OFFICE OF THE CITY ATTORNEY
CHARLES PARKIN, City Attorney
411 West Ocean Boulevard, 9th Floor
Long Beach, CA 90802-4664

AGREEMENT

36175

THIS AGREEMENT is made and entered, in duplicate, as of December 20, 2021, for reference purposes only, pursuant to a minute order adopted by the City Council of the City of Long Beach at its meeting on November 9, 2021, by and between BITFOCUS, INC., a Nevada corporation ("Contractor"), with a place of business at 1930 Village Center Circle, 3-963 Las Vegas, NV 89134, and the CITY OF LONG BEACH, a municipal corporation ("City").

WHEREAS, City desires to purchase a web-based software to provide the Health Department with a Health Management Information System; and

WHEREAS, City has selected Contractor in accordance with City's administrative procedures using a Request for Proposal No. HE21-055 ("RFP"), incorporated herein by this reference, and City has determined that Contractor and its employees are qualified, licensed, if so required, and experienced in performing these specialized services; and

WHEREAS, City desires to have Contractor perform these specialized services, and Contractor is willing and able to do so on the terms and conditions in this Agreement;

NOW, THEREFORE, in consideration of the mutual terms, covenants, and conditions in this Agreement, the parties agree as follows:

1. SCOPE OF WORK OR SERVICES.

A. Contractor shall furnish specialized services more particularly described in Exhibit "A", attached to this Agreement and incorporated by this reference, in accordance with the standards of the profession, and City shall pay for these services in the manner described below, not to exceed One Hundred Forty-Three Thousand One Hundred Forty Dollars ($143,140), at the rates or charges shown in Exhibit "B".

B. City shall pay Contractor in due course of payments following receipt from Contractor and approval by City of invoices showing the services or task performed, the time expended (if billing is hourly), and the name of the Project. Contractor shall certify on the invoices that Contractor has performed the services in full conformance with this Agreement and is entitled to receive payment. Each invoice shall be accompanied by a progress report indicating the progress to date of services performed and covered by the invoice, including a brief statement of any Project problems and potential causes of delay in performance, and listing those services that are projected for performance by Contractor during the next invoice cycle. Where billing is done and payment is made on an hourly basis, the parties acknowledge that this arrangement is either customary practice for Contractor's profession, industry or business, or is necessary to satisfy audit and legal requirements which may arise due to the fact that City is a municipality.

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C. Contractor represents that Contractor has obtained all necessary information on conditions and circumstances that may affect its performance and has conducted site visits, if necessary.

D. By executing this Agreement, Contractor warrants that Contractor (a) has thoroughly investigated and considered the scope of services to be performed, (b) has carefully considered how the services should be performed, and (c) fully understands the facilities, difficulties and restrictions attending performance of the services under this Agreement. If the services involve work upon any site, Contractor warrants that Contractor has or will investigate the site and is or will be fully acquainted with the conditions there existing, prior to commencement of services set forth in this Agreement. Should Contractor discover any latent or unknown conditions that will materially affect the performance of the services set forth in this Agreement, Contractor must immediately inform the City of that fact and may not proceed except at Contractor's risk until written instructions are received from the City.

E. Contractor must adopt reasonable methods during the life of the Agreement to furnish continuous protection to the work, and the equipment, materials, papers, documents, plans, studies and other components to prevent losses or damages, and will be responsible for all damages, to persons or property, until acceptance of the work by the City, except those losses or damages as may be caused by the City's own negligence.

F. CAUTION: Contractor shall not begin work until this Agreement has been signed by both parties and until Contractor's evidence of insurance has been delivered to and approved by City.

2. TERM. The term of this Agreement shall commence at midnight on January 1, 2022, and shall terminate at 11:59 p.m. on January 1, 2025, unless sooner terminated as provided in this Agreement, or unless the services or the Project is completed sooner. City shall have the option to extend the term of this Contract for five (5) additional one-year periods, at the discretion of the City Manager.

3. COORDINATION AND ORGANIZATION.

A. Contractor shall coordinate its performance with City's representative, if any, named in Exhibit "C", attached to this Agreement and incorporated by this reference. Contractor shall advise and inform City's representative of the work in progress on the Project in sufficient detail so as to assist City's representative in making presentations and in holding meetings on the Project. City shall furnish to Contractor information or materials, if any, described in Exhibit "D", attached to this Agreement and incorporated by this reference, and shall perform any other tasks described in the Exhibit.

B. The parties acknowledge that a substantial inducement to City for entering this Agreement was and is the reputation and skill of Contractor's key employee, named in Exhibit "E" attached to this Agreement and incorporated by this reference. City shall have the right to approve any person proposed by Contractor to replace that key employee.

4. INDEPENDENT CONTRACTOR. In performing its services,

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Contractor is and shall act as an independent contractor and not an employee, representative or agent of City. Contractor shall have control of Contractor's work and the manner in which it is performed. Contractor shall be free to contract for similar services to be performed for others during this Agreement; provided, however, that Contractor acts in accordance with Section 9 and Section 11 of this Agreement. Contractor acknowledges and agrees that (a) City will not withhold taxes of any kind from Contractor's compensation; (b) City will not secure workers' compensation or pay unemployment insurance to, for or on Contractor's behalf; and (c) City will not provide and Contractor is not entitled to any of the usual and customary rights, benefits or privileges of City employees. Contractor expressly warrants that neither Contractor nor any of Contractor's employees or agents shall represent themselves to be employees or agents of City.

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5. INSURANCE.

A. As a condition precedent to the effectiveness of this Agreement, Contractor shall procure and maintain, at Contractor's expense for the duration of this Agreement, from insurance companies that are admitted to write insurance in California and have ratings of or equivalent to A:V by A.M. Best Company or from authorized non-admitted insurance companies subject to Section 1763 of the California Insurance Code and that have ratings of or equivalent to A:VIII by A.M. Best Company, the following insurance:

(a) Commercial general liability insurance (equivalent in scope to ISO form CG 00 01 11 85 or CG 00 01 10 93) in an amount not less than \$1,000,000 per each occurrence and \$2,000,000 general aggregate. This coverage shall include but not be limited to broad form contractual liability, cross liability, independent contractors liability, and products and completed operations liability. City, its boards and commissions, and their officials, employees and agents shall be named as additional insureds by endorsement (on City's endorsement form or on an endorsement equivalent in scope to ISO form CG 20 10 11 85 or CG 20 26 11 85), and this insurance shall contain no special limitations on the scope of protection given to City, its boards and commissions, and their officials, employees and agents. This policy shall be endorsed to state that the insurer waives its right of subrogation against City, its boards and commissions, and their officials, employees and agents.

(b) Workers' Compensation insurance as required by the California Labor Code and employer's liability insurance in an amount not less than $1,000,000. This policy shall be endorsed to state that the insurer waives its right of subrogation against City, its boards and commissions, and their officials, employees and agents.

(c) Professional liability or errors and omissions insurance in an amount not less than $1,000,000 per claim.

(d) Commercial automobile liability insurance (equivalent in scope to ISO form CA 00 01 06 92), covering Auto Symbol 1 (Any Auto) in an amount not less than $500,000 combined single limit per accident.

B. Any self-insurance program, self-insured retention, or deductible must be separately approved in writing by City's Risk Manager or designee and shall protect City, its officials, employees and agents in the same manner and to the same extent as they would have been protected had the policy or policies not contained retention or deductible provisions.

C. Each insurance policy shall be endorsed to state that coverage shall not be reduced, non-renewed or canceled except after thirty (30) days prior written notice to City, shall be primary and not contributing to any other insurance or self-insurance maintained by City, and shall be endorsed to state that coverage maintained by City shall be excess to and shall not contribute to insurance or self-insurance maintained by Contractor. Contractor shall notify City in writing within five (5) days after any insurance has been voided by the insurer or cancelled by the insured.

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D. If this coverage is written on a "claims made" basis, it must provide for an extended reporting period of not less than one hundred eighty (180) days, commencing on the date this Agreement expires or is terminated, unless Contractor guarantees that Contractor will provide to City evidence of uninterrupted, continuing coverage for a period of not less than three (3) years, commencing on the date this Agreement expires or is terminated.

E. Contractor shall require that all sub-contractors or contractors that Contractor uses in the performance of these services maintain insurance in compliance with this Section unless otherwise agreed in writing by City's Risk Manager or designee.

F. Prior to the start of performance, Contractor shall deliver to City certificates of insurance and the endorsements for approval as to sufficiency and form. In addition, Contractor shall, within thirty (30) days prior to expiration of the insurance, furnish to City certificates of insurance and endorsements evidencing renewal of the insurance. City reserves the right to require complete certified copies of all policies of Contractor and Contractor's sub-Contractors and contractors, at any time. Contractor shall make available to City's Risk Manager or designee all books, records and other information relating to this insurance, during normal business hours.

G. Any modification or waiver of these insurance requirements shall only be made with the approval of City's Risk Manager or designee. Not more frequently than once a year, City's Risk Manager or designee may require that Contractor, Contractor's sub-Contractors and contractors change the amount, scope or types of coverages required in this Section if, in his or her sole opinion, the amount, scope or types of coverages are not adequate.

H. The procuring or existence of insurance shall not be construed or deemed as a limitation on liability relating to Contractor's performance or as full performance of or compliance with the indemnification provisions of this Agreement.

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6. ASSIGNMENT AND SUBCONTRACTING. This Agreement contemplates the personal services of Contractor and Contractor's employees, and the parties acknowledge that a substantial inducement to City for entering this Agreement was and is the professional reputation and competence of Contractor and Contractor's employees. Contractor shall not assign its rights or delegate its duties under this Agreement, or any interest in this Agreement, or any portion of it, without the prior approval of City, except that Contractor may with the prior approval of the City Manager of City, assign any moneys due or to become due Contractor under this Agreement. Any attempted assignment or delegation shall be void, and any assignee or delegate shall acquire no right or interest by reason of an attempted assignment or delegation. Furthermore, Contractor shall not subcontract any portion of its performance without the prior approval of the City Manager or designee, or substitute an approved sub-Contractor or contractor without approval prior to the substitution. Nothing stated in this Section shall prevent Contractor from employing as many employees as Contractor deems necessary for performance of this Agreement.

7. CONFLICT OF INTEREST. Contractor, by executing this Agreement, certifies that, at the time Contractor executes this Agreement and for its duration, Contractor does not and will not perform services for any other client which would create a conflict, whether monetary or otherwise, as between the interests of City and the interests of that other client. And, Contractor shall obtain similar certifications from Contractor's employees, sub-Contractors and contractors.

8. MATERIALS. Contractor shall furnish all labor and supervision, supplies, materials, tools, machinery, equipment, appliances, transportation and services necessary to or used in the performance of Contractor's obligations under this Agreement, except as stated in Exhibit "D".

9. OWNERSHIP OF DATA. All materials, information and data prepared, developed or assembled by Contractor or furnished to Contractor in connection with this Agreement, including but not limited to documents, estimates, calculations,

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studies, maps, graphs, charts, computer disks, computer source documentation, samples, models, reports, summaries, drawings, designs, notes, plans, information, material and memorandum ("Data") shall be the exclusive property of City. Data shall be given to City, in a format identified by City, and City shall have the unrestricted right to use and disclose the Data in any manner and for any purpose without payment of further compensation to Contractor. Copies of Data may be retained by Contractor but Contractor warrants that Data shall not be made available to any person or entity for use without the prior approval of City. This warranty shall survive termination of this Agreement for five (5) years.

10. TERMINATION. Either party shall have the right to terminate this Agreement for any reason or no reason at any time by giving ninety (90) calendar days prior notice to the other party. In the event of termination under this Section, City shall pay Contractor for services satisfactorily performed and costs incurred up to the effective date of termination for which Contractor has not been previously paid. The procedures for payment in Section 1.B. with regard to invoices shall apply. On the effective date of termination, Contractor shall deliver to City all Data developed or accumulated in the performance of this Agreement, whether in draft or final form, or in process. And, Contractor acknowledges and agrees that City's obligation to make final payment is conditioned on Contractor's delivery of the Data to City.

11. CONFIDENTIALITY. Contractor shall keep all Data confidential and shall not disclose the Data or use the Data directly or indirectly, other than in the course of performing its services, during the term of this Agreement and for five (5) years following expiration or termination of this Agreement. In addition, Contractor shall keep confidential all information, whether written, oral or visual, obtained by any means whatsoever in the course of performing its services for the same period of time. Contractor shall not disclose any or all of the Data to any third party, or use it for Contractor's own benefit or the benefit of others except for the purpose of this Agreement.

12. BREACH OF CONFIDENTIALITY. Contractor shall not be liable for a breach of confidentiality with respect to Data that: (a) Contractor demonstrates Contractor

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knew prior to the time City disclosed it; or (b) is or becomes publicly available without breach of this Agreement by Contractor; or (c) a third party who has a right to disclose does so to Contractor without restrictions on further disclosure; or (d) must be disclosed pursuant to subpoena or court order.

13. ADDITIONAL SERVICES. The City has the right at any time during the performance of the services, without invalidating this Agreement, to order extra work beyond that specified in the RFP or make changes by altering, adding to or deducting from the work. No extra work may be undertaken unless a written order is first given by the City, incorporating any adjustment in the Agreement Sum, or the time to perform this Agreement. Any increase in compensation of ten percent (10%) or less of the Agreement Sum, or in the time to perform of One Hundred Eighty (180) days or less, may be approved by the City Representative. Any greater increases, taken either separately or cumulatively, must be approved by the City Council. It is expressly understood by Contractor that the provisions of this paragraph do not apply to services specifically set forth in the RFP or reasonably contemplated in the RFP. Contractor acknowledges that it accepts the risk that the services to be provided pursuant to the RFP may be more costly or time consuming than Contractor anticipates and that Contractor will not be entitled to additional compensation for the services set forth in the RFP.

14. RETENTION OF FUNDS. Contractor authorizes the City to deduct from any amount payable to Contractor (whether or not arising out of this Agreement) any amounts the payment of which may be in dispute or that are necessary to compensate the City for any losses, costs, liabilities or damages suffered by the City, and all amounts for which the City may be liable to third parties, by reason of Contractor's acts or omissions in performing or failing to perform Contractor's obligations under this Agreement. In the event that any claim is made by a third party, the amount or validity of which is disputed by Contractor, or any indebtedness exists that appears to be the basis for a claim of lien, the City may withhold from any payment due, without liability for interest because of the withholding, an amount sufficient to cover the claim. The failure of the City to exercise the

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right to deduct or to withhold will not, however, affect the obligations of Contractor to insure, indemnify and protect the City as elsewhere provided in this Agreement.

15. AMENDMENT. This Agreement, including all Exhibits, shall not be amended, nor any provision or breach waived, except in writing signed by the parties which expressly refers to this Agreement.

16. LAW. This Agreement shall be construed in accordance with the laws of the State of California, and the venue for any legal actions brought by any party with respect to this Agreement shall be the County of Los Angeles, State of California for state actions and the Central District of California for any federal actions. Contractor shall cause all work performed in connection with construction of the Project to be performed in compliance with (1) all applicable laws, ordinances, rules and regulations of federal, state, county or municipal governments or agencies (including, without limitation, all applicable federal and state labor standards, including the prevailing wage provisions of sections 1770 *et seq.* of the California Labor Code); and (2) all directions, rules and regulations of any fire marshal, health officer, building inspector, or other officer of every governmental agency now having or hereafter acquiring jurisdiction. If any part of this Agreement is found to be in conflict with applicable laws, that part will be inoperative, null and void insofar as it is in conflict with any applicable laws, but the remainder of the Agreement will remain in full force and effect.

17. ENTIRE AGREEMENT. This Agreement, including all Exhibits, constitutes the entire understanding between the parties and supersedes all other agreements, oral or written, with respect to the subject matter in this Agreement.

18. INDEMNITY.

A. Contractor shall indemnify, protect and hold harmless City, its Boards, Commissions, and their officials, employees and agents ("Indemnified Parties"), from and against any and all liability, claims, demands, damage, loss, obligations, causes of action, proceedings, awards, fines, judgments, penalties, costs and expenses, including attorneys' fees, court costs, expert and witness fees,

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and other costs and fees of litigation, arising or alleged to have arisen, in whole or in part, out of or in connection with (1) Contractor's breach or failure to comply with any of its obligations contained in this Agreement, including all applicable federal and state labor requirements including, without limitation, the requirements of California Labor Code section 1770 *et seq.* or (2) negligent or willful acts, errors, omissions or misrepresentations committed by Contractor, its officers, employees, agents, subcontractors, or anyone under Contractor's control, in the performance of work or services under this Agreement (collectively "Claims" or individually "Claim").

B. In addition to Contractor's duty to indemnify, Contractor shall have a separate and wholly independent duty to defend Indemnified Parties at Contractor's expense by legal counsel approved by City, from and against all Claims, and shall continue this defense until the Claims are resolved, whether by settlement, judgment or otherwise. No finding or judgment of negligence, fault, breach, or the like on the part of Contractor shall be required for the duty to defend to arise. City shall notify Contractor of any Claim, shall tender the defense of the Claim to Contractor, and shall assist Contractor, as may be reasonably requested, in the defense.

C. If a court of competent jurisdiction determines that a Claim was caused by the sole negligence or willful misconduct of Indemnified Parties, Contractor's costs of defense and indemnity shall be (1) reimbursed in full if the court determines sole negligence by the Indemnified Parties, or (2) reduced by the percentage of willful misconduct attributed by the court to the Indemnified Parties.

D. The provisions of this Section shall survive the expiration or termination of this Agreement.

19. <u>FORCE MAJEURE</u>. If any party fails to perform its obligations because of strikes, lockouts, labor disputes, embargoes, acts of God, inability to obtain labor or materials or reasonable substitutes for labor materials, governmental restrictions, governmental regulations, governmental controls, judicial orders, enemy or hostile

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governmental action, pandemic, civil commotion, fire or other casualty, or other causes beyond the reasonable control of the party obligated to perform, then that party's performance will be excused for a period equal to the period of such cause for failure to perform.

20. <u>AMBIGUITY</u>. In the event of any conflict or ambiguity between this Agreement and any Exhibit, the provisions of this Agreement shall govern.

21. <u>NONDISCRIMINATION</u>.

A. In connection with performance of this Agreement and subject to applicable rules and regulations, Contractor shall not discriminate against any employee or applicant for employment because of race, religion, national origin, color, age, sex, sexual orientation, gender identity, AIDS, HIV status, handicap or disability. Contractor shall ensure that applicants are employed, and that employees are treated during their employment, without regard to these bases. These actions shall include, but not be limited to, the following: employment, upgrading, demotion or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship.

22. <u>EQUAL BENEFITS ORDINANCE</u>. Unless otherwise exempted in accordance with the provisions of the Ordinance, this Agreement is subject to the applicable provisions of the Equal Benefits Ordinance (EBO), section 2.73 et seq. of the Long Beach Municipal Code, as amended from time to time.

A. During the performance of this Agreement, the Contractor certifies and represents that the Contractor will comply with the EBO. The Contractor agrees to post the following statement in conspicuous places at its place of business available to employees and applicants for employment:

"During the performance of a contract with the City of Long Beach, the Contractor will provide equal benefits to employees with spouses and its employees with domestic partners. Additional information about the City of

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Long Beach's Equal Benefits Ordinance may be obtained from the City of Long Beach Business Services Division at 562-570-6200."

B. The failure of the Contractor to comply with the EBO will be deemed to be a material breach of the Agreement by the City.

C. If the Contractor fails to comply with the EBO, the City may cancel, terminate or suspend the Agreement, in whole or in part, and monies due or to become due under the Agreement may be retained by the City. The City may also pursue any and all other remedies at law or in equity for any breach.

D. Failure to comply with the EBO may be used as evidence against the Contractor in actions taken pursuant to the provisions of Long Beach Municipal Code 2.93 et seq., Contractor Responsibility.

E. If the City determines that the Contractor has set up or used its contracting entity for the purpose of evading the intent of the EBO, the City may terminate the Agreement on behalf of the City. Violation of this provision may be used as evidence against the Contractor in actions taken pursuant to the provisions of Long Beach Municipal Code Section 2.93 et seq., Contractor Responsibility.

23. NOTICES. Any notice or approval required by this Agreement shall be in writing and personally delivered or deposited in the U.S. Postal Service, first class, postage prepaid, addressed to Contractor at the address first stated above, and to City at 411 West Ocean Boulevard, Long Beach, California 90802, Attn: City Manager, with a copy to the City Clerk at the same address. Notice of change of address shall be given in the same manner as stated for other notices. Notice shall be deemed given on the date deposited in the mail or on the date personal delivery is made, whichever occurs first.

24. COPYRIGHTS AND PATENT RIGHTS.

A. Contractor shall place the following copyright protection on all Data: © City of Long Beach, California ____, inserting the appropriate year.

B. City reserves the exclusive right to seek and obtain a patent or copyright registration on any Data or other result arising from Contractor's

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performance of this Agreement. By executing this Agreement, Contractor assigns any ownership interest Contractor may have in the Data to the City.

C. Contractor warrants that the Data does not violate or infringe any patent, copyright, trade secret or other proprietary right of any other party. Contractor agrees to and shall protect, defend, indemnify and hold City, its officials and employees harmless from any and all claims, demands, damages, loss, liability, causes of action, costs or expenses (including reasonable attorneys' fees) whether or not reduced to judgment, arising from any breach or alleged breach of this warranty.

25. COVENANT AGAINST CONTINGENT FEES. Contractor warrants that Contractor has not employed or retained any entity or person to solicit or obtain this Agreement and that Contractor has not paid or agreed to pay any entity or person any fee, commission or other monies based on or from the award of this Agreement. If Contractor breaches this warranty, City shall have the right to terminate this Agreement immediately notwithstanding the provisions of Section 10 or, in its discretion, to deduct from payments due under this Agreement or otherwise recover the full amount of the fee, commission or other monies.

26. WAIVER. The acceptance of any services or the payment of any money by City shall not operate as a waiver of any provision of this Agreement or of any right to damages or indemnity stated in this Agreement. The waiver of any breach of this Agreement shall not constitute a waiver of any other or subsequent breach of this Agreement.

27. CONTINUATION. Termination or expiration of this Agreement shall not affect rights or liabilities of the parties which accrued pursuant to the Sections titled "Ownership of Data", "Confidentiality", "Breach of Confidentiality", "Law "Indemnity", and "Audit" prior to termination or expiration of this Agreement.

28. TAX REPORTING. As required by federal and state law, City is obligated to and will report the payment of compensation to Contractor on Form 1099-Misc.

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Contractor shall be solely responsible for payment of all federal and state taxes resulting from payments under this Agreement. Contractor shall submit Contractor's Employer Identification Number (EIN), or Contractor's Social Security Number if Contractor does not have an EIN, in writing to City's Accounts Payable, Department of Financial Management. Contractor acknowledges and agrees that City has no obligation to pay Contractor until Contractor provides one of these numbers.

29. ADVERTISING. Contractor shall not use the name of City, its officials or employees in any advertising or solicitation for business or as a reference, without the prior approval of the City Manager or designee.

30. AUDIT. City shall have the right at all reasonable times during the term of this Agreement and for a period of five (5) years after termination or expiration of this Agreement to examine, audit, inspect, review, extract information from and copy all books, records, accounts and other documents of Contractor relating to this Agreement.

31. THIRD PARTY BENEFICIARY. This Agreement is not intended or designed to or entered for the purpose of creating any benefit or right for any person or entity of any kind that is not a party to this Agreement.

IN WITNESS WHEREOF, the parties have caused this document to be duly executed with all formalities required by law as of the date first stated above.

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BITFOCUS, INC., a Nevada corporation

Jan 7, 2022 By ______________________
Name Jeffrey Vaidi
Title COO, Bitfocus. Inc

________________, 202_ By ______________________
Name ______________________
Title ______________________

"Contractor"

CITY OF LONG BEACH, a municipal corporation

________________, 202_ By ______________________
City Manager

"City"

This Agreement is approved as to form on ________________, 202_.

CHARLES PARKIN, City Attorney

By ______________________
Deputy

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BITFOCUS, INC., a Nevada corporation

Jan 7 , 20222 By [signature]
Name Jeffrey Vobi
Title COO, Bitfocus, Inc

, 202_ By
Name
Title

"Contractor"

CITY OF LONG BEACH, a municipal corporation

1/14/ , 2022 By Linda F. Tatum
City Manager

EXECUTED PURSUANT TO SECTION 301 OF THE CITY CHARTER.

"City"

This Agreement is approved as to form on January 13 , 2022.

CHARLES PARKIN, City Attorney

By [signature]
Deputy

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State of Hawaii

County of Kaua'i }

On 1-7-2022, before me, Karlina Tasaka (here insert name of notary),

personally appeared Jeffrey Uaai (name(s) of Signer(s)),

personally known to me (or proved to me on the basis of satisfactory evidence) to be the person(s) whose name(s) is/are subscribed to the within instrument and acknowledged to me that he/she/they executed the same in his/her/their authorized capacity(ies), and that by his/her/their signature(s) on the instrument the person(s), or the entity upon behalf of which the person(s) acted, executed the instrument.

WITNESS my hand and official seal.

Signature Karlina Tasaka *(SEAL)*

My Commission Expires: 04-24-2024

Karlina Tasaka NOTARY 16-460 PUBLIC STATE OF HAWAII

This area for Official Notarial Seal

NOTARY PUBLIC CERTIFICATION

Doc. Date: 1-7-22 # Pages: 17

Notary Name: Karlina Tasaka Judicial Circuit: 5

Doc. Description: Contract w/ att. ack

Notary Signature: Karlina Tasaka

Date: 1-7-22

Karlina Tasaka NOTARY 16-460 PUBLIC STATE OF HAWAII

ALL PURPOSE ACKNOWLEDGMENT

ID-1770 (HI) (Rev. 7/09)

EXHIBIT “A”

Scope of Work

3. SCOPE OF PROJECT

3.1 Background

The Continuum of Care (CoC) Program (24 CFR part 578, the CoC Program interim rule) is a community-wide system of care with the goal of ending homelessness. Efforts toward reaching this goal include providing funding for community-based organizations and local governments to quickly re-house those experiencing homelessness while minimizing the trauma and dislocation caused by homelessness, to promote access to and provide effective utilization of mainstream programs, and to optimize self-sufficiency among those experiencing homelessness within the jurisdiction of Long Beach. One of the components of the CoC Program is the HMIS.

The HMIS is administered by the CoC lead agency, the City. The HMIS is a centralized electronic data collection system that allows the City to obtain an deduplicated/distinct count of persons served by participating organizations. Additionally, the HMIS provides information about the flow of individuals and families through the Long Beach homeless services system, which includes who accesses services and the types of services that lead people to positive housing outcomes. Analyzing the system assists the CoC in evaluating the effectiveness of programs while providing information for policy creation and advocacy. By gathering and analyzing data on the individuals and families who experience homelessness over time, the CoC can work to increase performance and outcomes, which is a direct benefit for the organizations utilizing the system. The HMIS technology also improves service delivery to persons experiencing homelessness in allowing for improved coordination.

3.2 Proposal Format

Narrative Proposals should include a Company Profile per Section 9. The Narrative Proposal should also address the requirements and desirables listed in Section 7, Specifications (see Section 5.1 for Evaluation Criteria). Additionally, successful proposals should also demonstrate:

- Past experience working with CoCs in the following areas:
  - Contract execution
  - Large scale migration, data mapping, document transfers, and integrations.
  - Meeting deadlines for go-live functionality
- Software functionality and user experience.
- Functionality requested in the System Features (Section 7.1), Reporting (Section 7.2), and System Administration (Section 7.4) sections.
- Process by which the company reviews and incorporates required HUD data changes and functionality.
- How the company monitors national and regional technology and data trends within homeless services and how customer input becomes incorporated within the software's functionality.

- A timely, effective, and convenient customer support system available to users, including a help desk available to users during business hours.
- Technical support available for system administrators, technologists, and other systems integrators/implementors under contract by CoCs, specifically during initial implementation, provisions for ongoing system maintenance, software update materials, and the ability to make ongoing enhancements to comply with standards, as well as, satisfactory response times for system fixes.
- Training materials made available to support system change. For example, documents that support system, project, and service setup, train-the-trainer materials, guidelines on creating custom reports.
- Documentation that shows financial stability, including recent increases in sales and customer retention without signs of defaults, extended terms, and other signs of financial hardships – see Section 9.1
- Conformance to all the terms and scope, and demonstrate the full functionality of all HUD standard system reports.
- The ability to meet the transition timeline.

3.3 Project Timeline

The timeline for this project is quick and proposers must be capable of meeting the fast-paced timeline:

- Month 1:
  1) Kick off meeting
  2) System admin training
  3) Data element mapping (HUD data elements, custom data elements, services, and assessments)
- Month 2:
  1) Formatting and mapping of data/documents transitioning from other software system.
  2) Project configuration
  3) System configuration
  4) End user training
  5) End of July: All HUD data elements migrated and available in live-site
- Month 3:
  1) August 1st: Go-live in new system
  2) Assessment and Case Management migrated and available in live-site
- Month 4:
  1) Custom Data elements (services, notes, contacts, etc.) migrated and available in live-site
- Month 5:
  1) File attachment migrated and available in live-site

Purpose-built to support high-performing Continuums of Care

Section 3: Scope of Project

Past experience working with CoCs in the following areas: Contract execution, Large scale migration, data mapping, document transfers, and integrations.

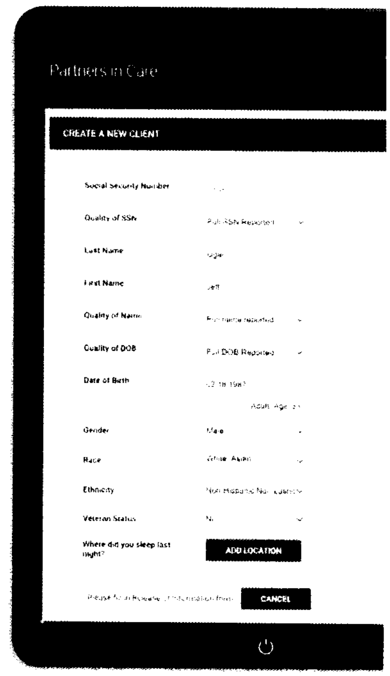
Extensive experience working with Long Beach and other leading Continuums

Since our partnership began last September, close collaboration with the Homeless Services Division and broader continuum of providers allowed Bitfocus to quickly complete contract execution, reliably map and migrate legacy data, and successfully launch Clarity Human Services as the community's designated HMIS shortly thereafter.

The nation's fastest-growing HMIS, our work in Long Beach builds on our extensive experience transitioning CoCs to Clarity Human Services. Quickly becoming the HMIS of choice for the nation's highest-performing communities, Bitfocus proudly partners with many of the largest continuums, including Los Angeles, San Francisco, Boston, Denver, San Diego, Las Vegas, Silicon Valley, and Seattle. The Clarity Human Services customer base includes over 75 systems, including HMIS implementations for over 51 CoCs across 40 implementations.

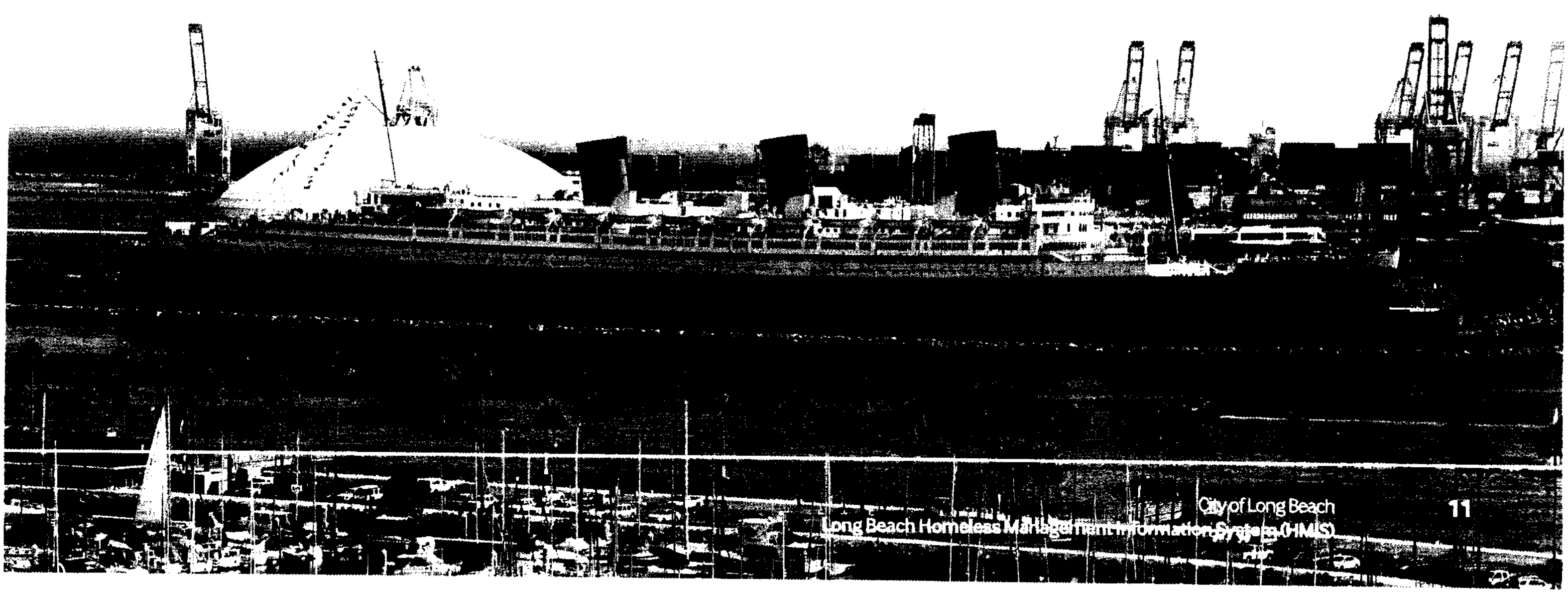
We are the software provider for 6 statewide implementations (Rhode Island, Washington, Wisconsin, Nebraska, Nevada, and Colorado) and currently manage over 80% of the Permanent Supportive Housing (PSH) beds in California. We have been in the HMIS market since 2003, serving as the HMIS vendor for 7 of the 10 US cities with the largest homeless populations. For the past year, we have also served as the HMIS vendor for the Long Beach CoC.

Data Migration and Integration



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. Having migrated millions of client records from legacy systems to Clarity Human Services -- including custom data elements, case notes, and document transfers --, we've been down this road before, and we know what it takes to get things right.

Looking forward, with Long Beach's migration complete, 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, all of 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.



Meeting deadlines for go-live functionality

Bitfocus consistently meets our deadlines. We migrated millions of client records from legacy systems to Clarity Human Services and have a robust process, highly experienced team, and well-established track record of achieving non-negotiable go-live dates.

Our successful implementation in Long Beach resulted from accomplishing crucial milestones quickly and communicating clearly and consistently throughout the process. Most importantly, with Go Live behind us and the Long Beach CoC is already using Clarity Human Services, no additional work is necessary.

Software functionality and user experience

Clarity Human Services Functionality: An HMIS experience users love

Clarity Human Services is a modern, purpose-built homeless data platform that supports the nation's high-performing Continuums of Care

Since its inception, Bitfocus has always served as an HMIS system administrator - first for the State of Nevada, then expanding to numerous other CoCs several years later. We built Clarity Human Services out of necessity after spending several years hindered by using clunky software in our Nevada HMIS system administrator role. This is why we designed Clarity Human Services from the bottom up to be an HMIS, first and foremost.

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. 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, including PDDEs. These reports are well-documented and are kept updated and in full compliance with standards. Users can generate and submit these reports on-demand and with almost no processing time depending on the access role.

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.

Fully Integrated Coordinated Entry Outreach: Built-In Support for Tracking Engagement, Performance, and Trends

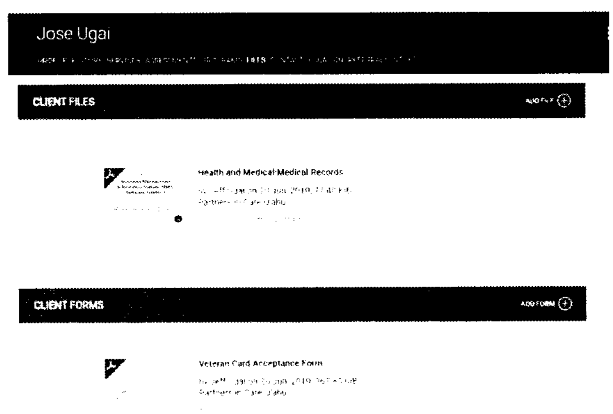
Clarity Human Services provides an accessible and intuitive means of tracking individual progress, program performance, and community-wide performance and trends.

Individual Progress

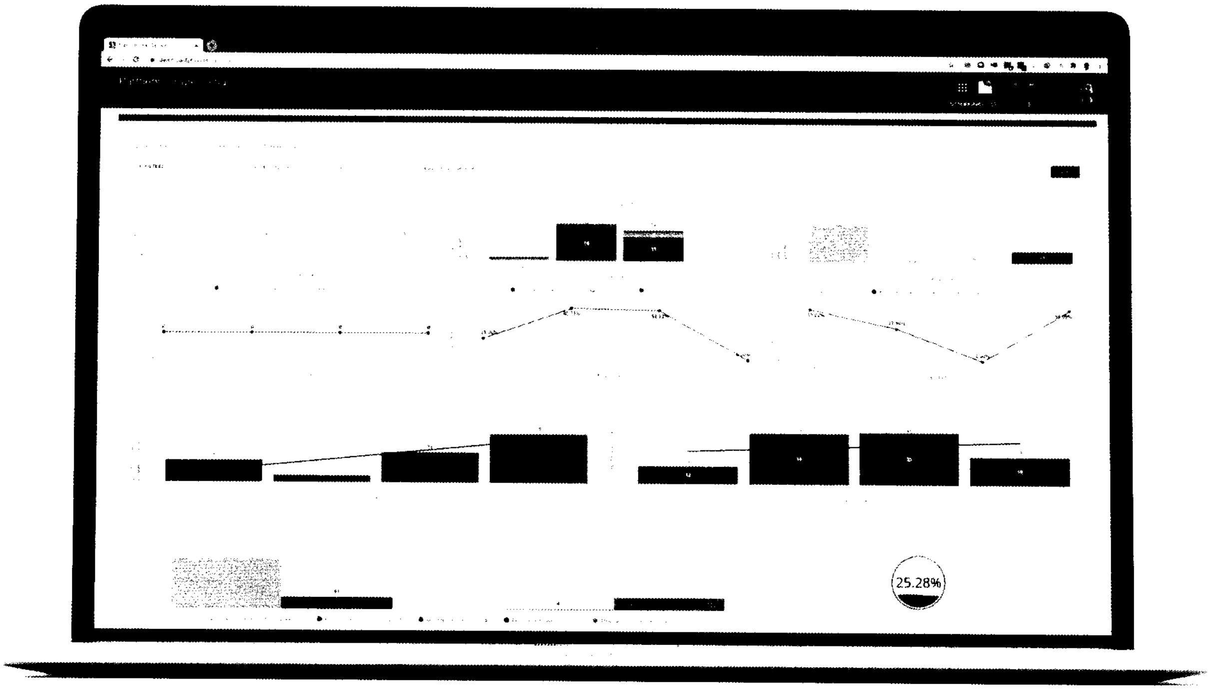
The built-in progress tracking tools in Clarity Human Services make simple work of tracking individual progress and case plan customization.

- **Assessments**: Clarity Human Services offers the flexibility to configure multiple assessments and assign them to programs as necessary. Assessments can be used to measure client status as well as ongoing progress longitudinally over time. Variables can be tracked automatically by the system or

Esri ArcGIS® Built-In: Clarity Human Services adds geospatial context to HMIS data using information captured by GPS or automatically geocoded from manually entered locations. Data can then be applied to maps and other visualizations using the built-in Data Analysis tool, or exported for further analysis.



Documents and Files: Clarity Human Services allows end-users to upload documents & photos, (including partnership information, contracts, attachments, etc), to client record



captured on-demand (i.e., status assessment) manually. Clarity Human Services offers numerous pre-built assessments but also provides the ability to create your own assessments to match your local priorities. Assessments can be populated with custom fields, and they can be as lengthy or brief as necessary. These custom fields will then be available in the ad-hoc data analysis tool by default. The system administrator or agency manager can enable Assessment Processors for any assessment that needs to be scored. When creating assessments, the system administrator can select a pre-built system processor or a custom Assessment Processor that they created specifically for that assessment. Also, to document changes over time (i.e., client progressing to self-sufficiency), the system administrator can implement Assessment Measures and track changes in the specified variables longitudinally over time. There is no limit to the number of assessment measures that can be created. Individual assessments based on goals can also be used, tracking things such as Employment, Education, earned income, or Housing. These assessments have proven to be extremely useful when you need to collect real-time data manually.

- **Program Goals**: Program Goals in Clarity Human Services let communities set program-wide or client-specific goals and tie them back to measurable outcomes, such as enrollment in mainstream benefits programs. Clarity Human Services will automatically track a client's progress towards the goal based on their latest status assessments. Associated dashboards and reports can be pinned to user's start pages or distributed automatically via email (or other means). Goals can be manually created or auto-assigned, meaning they will be automatically assigned when a client is enrolled in a program. Completion of goals can then be manually documented through a program status assessment or automatically recorded by providing a service that satisfies the goal.

Measuring Community Performance

Custom configuration and robust business intelligence make measuring objective service and activity outcomes possible at the system-, agency-, program-levels.

- **Flexible Configuration**: Clarity Human Services includes program, performance-target, and contract configuration capabilities. The Clarity Human Services program configuration functionality allows for creating a highly flexible workflow for any program and captures unique workflows and performance metrics. Individual goals, funding sources, eligibility requirements, contracts, automated service delivery, documentation requirements, and myriad other configuration options ensure that the program is set up in a method that ultimately leads to better data quality and performance analytics. Administrators can set custom program performance targets based on HUD or custom data elements. Associated dashboards and reports can be pinned to user's start pages or distributed automatically via email (or other means).

Powerful Outcome Reporting and Analysis

The Data Analysis Tool

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. All data elements in the Clarity Human Services system (including custom fields) are automatically translated to this tool, making it possible to report on service data from all imaginable angles.

- **Public-facing dashboards and embeddable visualizations**: The public data model in our Data Analysis

Tools allows analysts to 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.

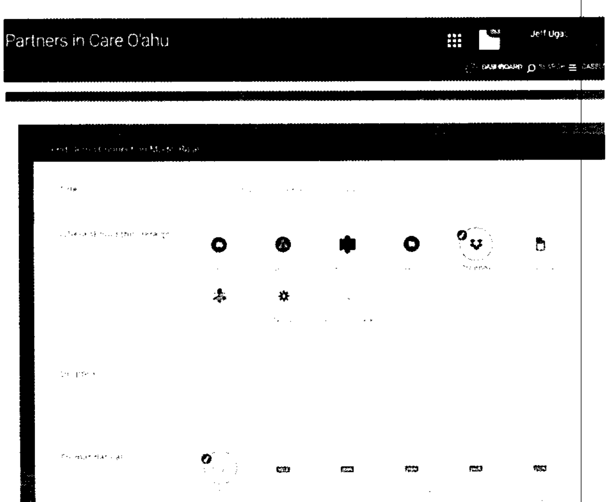
- **Data Model**: For advanced reporting and backup applications, Clarity Human Services supports direct VPN access to a real-time replica of your client data, allowing you to run custom queries or connect third-party tools like Tableau®.

The User Experience

The Clarity Human Services interface is clean, modern, and easy to use. It is clear of unnecessary elements. The end-user enjoys a consistent pattern in language, layout, and design throughout the application. When it comes to staying organized, there are several ways that users can track to-do lists, schedule appointments, and reminders:

- **Client Appointment Scheduler and Appointments Report**: Event reminders can be created using the Appointment tool and synced securely to the staff member's calendar. Reports and dashboards can also be generated to view the list of appointments for a specific client.

- **Calendar**: Clarity Human Services also offers an integrated Calendar, which may be subscribed to through an external email client such as Outlook. The Calendar feed also contains links directly to client programs and services. For example, a staff member can set a due date for re-assessment for a particular program. The link will automatically appear on the calendar when the re-assessment is due. When the link is selected, it will automatically direct the user to the requested location.



Point-and-Click Integrations: The Clarity Human Services Data Analysis Tool empowers even the novice analyst with robust automated data exports, notifications, and alerts.

- **Daily Reports**: Also, if the Case Plans are generated through assessments, daily automated reports can be designed with date fields such as Follow-Up and Next Appointment Date, etc.

- **Triggers**: the Alerts feature in our Data Analysis Tool can be used to trigger email notifications, hit a Zapier webhook, or send notifications via third-party providers such as Twilio. Alerts are highly customizable, allowing authorized users to set the title, conditions, recipients, frequency, and permissions associated with each notification.

- **Referral Notifications**: Clarity Human Services also includes customizable referral notification alerts that can be delivered via in-app message and/or external email (without client PII).

- **Status Assessment Due Notification**: These alerts specify staff when a client assessment due date nears. An Assessment Due notification appears in the right sidebar of the Program tab in the client record. The system can also be configured to send the caseworker an email reminding them of the status assessment.

It Matters Where it Starts: Data Entry

Data can be entered into Clarity Human Services in several ways to accommodate the needs of all types of caseworkers, whether in the field or at their desk:

- **Data entry tools**: Attention to user experience and user interface design are hallmarks of the Clarity Human Services HMIS. This attention to detail and first-hand knowledge has led our platform to be the most straightforward and automated system for direct client data entry. Auto-populating screens, display logic, on-screen calculations, and income verification features are just a few features that ensure ease of data entry.

- **ID and/or biometric scanning technology-based intake**: Clarity Human Services includes a tool that allows the user to take photographs of clients directly from the web browser or mobile device and to create photo-ID cards with a personal barcode. These cards can then support high-volume check-ins to shelters, bed nights, and other services. We can customize these cards with local logos, additional fields, or other details (additional fees may apply). In most cases, we can also transfer legacy IDs during the migration—allowing you to continue to use your current scan cards with Clarity Human Services (barcode, scan card, or biometric capabilities for data entry).

- **Integrated for mobile devices**: Clarity Human Services is mobile-friendly and includes several features such as signature and location capture that take advantage of mobile devices' unique capability. The application empowers outreach workers with full access to the data system functionality from their tablet or phone. Authorized users can securely track outreach efforts, complete Coordinated Entry assessments, and-- where appropriate-- reserve housing and service resources from the field. It's also Location-Aware, with the ability to add geographic context to homeless data by using GPS coordinates (e.g., using a mobile device) and automatic geocoding of manually entered addresses. Location information can be combined with other data points to create geographic visualizations using our built-in Data Analysis tool or third-party reporting tools (e.g., Tableau® or ArcGIS®) via our Customer Data Model.

- **Document and file management**: Clarity Human Services allows end-users to upload documents & photos (including partnership information, contracts, attachments, etc.) to client records, including unassigned clients, to have a better record of client needs. System administrators (and agency managers, if access role allows) can also create custom PDF document templates that are both readable and printable. End users can quickly take and crop photos from within the Clarity Human Services application.

Functionality requested in the System Features (Section 7.1), Reporting (Section 7.2), and System Administration (Section 7.4) sections.

Please see Section 7 for this content.

Process by which the company reviews and incorporates required HUD data changes and functionality.

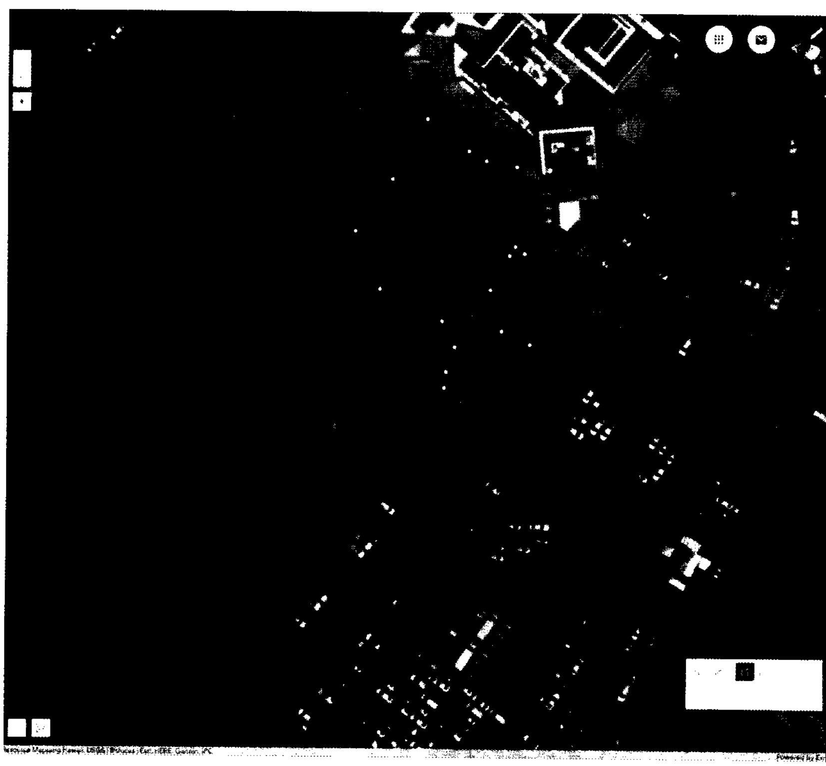
As system administrators ourselves, we use the same Clarity Human Services software as our customers. So, reviewing and incorporating required HUD data changes and functionality is vital to our operations, just as much as they are to yours! We can not afford the risk of missing a HUD/Federal Partner deadline nor risk a report being non-compliant. This requirement is unique to Bitfocus, compared to other vendors in this industry, and it 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



Mobile-Ready Outreach and Encampment Functionality: The location-aware outreach and encampment features in Clarity Human Services facilitate the progressive engagement of hard-to-reach populations and add geographic context to HMIS data. Built using Esri's ArcGIS® platform, location information in Clarity Human Services can be easily combined with other data sources or exported to ArcGIS® for in-depth analysis.

esri Partner Network Bronze

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.

How the company monitors national and regional technology and data trends within homeless services and how customer input becomes incorporated within the software's functionality; A timely, effective, and convenient customer support system available to users, including a help desk available to users during business hours.

National and regional trends

Bitfocus rigorously monitors national and regional technology and data trends within homeless services. We take 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 engagement in the national conversation around HMIS and homeless policy. Our staff is among the most active participants in the HUD Vendor Workgroup. 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.

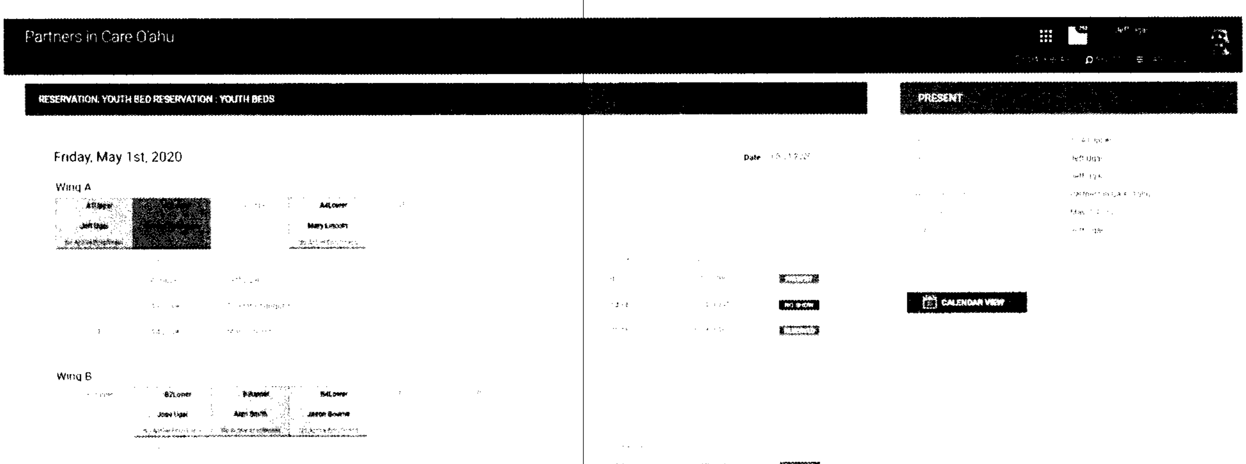
As HMIS System Administrators ourselves, we rely on Clarity Human Services for our own success and are committed to continuously advancing the platform according to national best practices and industry standards. We also understand the importance of publishing HUD and other federal reports on time and in full compliance with published specifications. We have consistently delivered updates to official data collection screens and reports on or before the published HUD deadlines. Our standard agreements include contractual commitments to maintain full compliance with current Data Standards, Programming Specifications, and other HMIS policies and regulations established by HUD and its federal partners.

Incorporation of Customer Feedback

Customer feedback means a lot to us. We view ourselves as collaborative partners in our customer's effort to end homelessness in their communities, which means we rely heavily on their feedback to guide the development of Clarity Human Services and shape our efforts to improve our services.

We have an active Product Roadmap and Idea Board. Customers can view the current product roadmap, offer comments and feedback, or suggest new features and functionality via an online customer forum. If you see an idea you like, you can upvote it to let us know it matters to you, too. The roadmap also provides easy reference to track feature ideas, upcoming development, and recent releases.

For more day-to-day collaboration, we have a community Slack group. You can join your peers on our Bitfocus Community Slack workspace, clarityHS.



Attendance Module: Clicking a button will record clients and their household members as 'checked-in' for any attendance-based service. Mass check-in is available for this method, too.

slack.com. This group is open to all Clarity Human Services users. Our Slack community offers a forum for frank and open discussion about emerging issues, best practices, and new ideas.

Technical support available for system administrators, technologists, and other systems integrators/implementors under contract by CoCs, specifically during initial implementation, provisions for ongoing system maintenance, software update materials, and the ability to make ongoing enhancements to comply with standards, as well as, satisfactory response times for system fixes.

Technical Support for System Administration Staff

Helpdesk

Technical support is available for all system administrators throughout the entire duration of the contract. We staff our help desk with experienced technical experts ready to assist users via email, phone, or chat.

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. During business hours, the Customer Support Team responds to all initial support tickets within 30 minutes. Our users love us, with our Help Desk averaging a 99.5%+ satisfaction rating.

Dedicated Account Manager

In addition to our standard help desk and training resources, we assign each community 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, support tickets, and proactively check in throughout the length of the contract to make sure you're getting the most of your Clarity Human Services implementation. Authorized users can be given direct access to ticket content and resolution times for all users via our Help Center.

Help Center

The Clarity Human Services Help Center (get.clarityhs.help) 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.

Training Site (LMS)

A dedicated learning management system (LMS) provides access to a comprehensive curriculum of on-demand training, with learning paths dedicated to various user roles and functional areas of the system. For more information or to view sample courses, visit learn.bitfocus.com.

In-Application Support

Our in-app support widget provides instant access to relevant help desk articles and other resources directly from within the Clarity Human Services interface.

Ongoing System Maintenance

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 and the timely resolution of technical and performance maintenance issues.

Comprehensive Support, Maintenance, and Upgrades

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 the 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 take 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 allow users to use and test the changes before applying 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 most updates, and no effort is required on behalf of the system administrators. Sufficient notice is provided if downtime should occur.

Clarity Human Services SaaS software development and refinement 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 both parties agree upon a scope of work for requested customizations or professional services.)

Training materials made available to support system change. For example, documents that support system, project, and service setup, train-the-trainer materials, guidelines on creating custom reports.

Getting System Administrators Ready: System Administration and Train-the-Trainer Courses

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 to support system, project, and service set up and train their users. We will provide the entire City of Long Beach system administration team with a full system administration training and a train-the-trainer session to prepare the City of Long Beach 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 end-user experience. Our Learning and Development team partners with our own system administrators to create in-depth content to 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.

Clarity Human Services also includes ready-to-use program templates covering the data collection and reporting requirements for each HUD and federal partner program type.

Guidance for working with reports

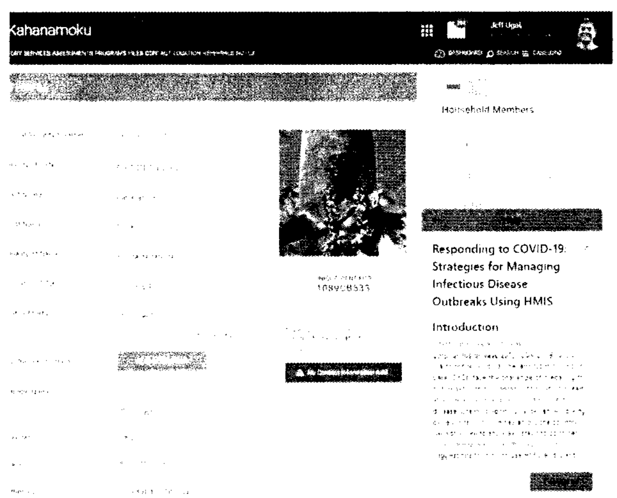
Data Analysis Tool training for custom reporting is included as part of our standard implementation. Additionally, our LMS has a free Intro to Reports course covering the basics of running reports in the Report Library and the Data Analysis Tool. To see a full list of course offerings, go to learn.bitfocus.com. We also have many Data Analysis sessions available in the archives of our Clarity Connect Conference sessions. To view the most recent conference sessions, go to bitfocus.com/connect.

Bitfocus offers extensive online report documentation for Clarity Human Services canned reports 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. 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.

The Bitfocus Data Services Team releases updates to the Clarity Human Services Ad Hoc Data Visualization Tool, on average, 3-4 times per month. Often, a corresponding email accompanies these updates, informing the system administrator of any important changes. There is also a section of the Clarity Help Center (get.clarityhs.help/) dedicated to the Ad Hoc Data Visualization Tool. 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. Also, the ClarityHuman Services application itself includes a searchable list of all fields and picklist values, including custom fields. 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. A dedicated learning management system (LMS) provides access to a comprehensive curriculum of on-demand training, with learning paths dedicated to various user roles and functional areas. For more information or to view sample courses, visit learn.bitfocus.com. Our in-app support widget provides instant access to relevant help desk articles and other resources directly from the Clarity Human Services interface.

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

System administrators will receive comprehensive training in the train-the-trainer sessions during the Implementation phase. However, should they ever need additional support or guidance, they can contact our help desk, which has agents standing by, or independently consult the available documentation in the online library. (example: bit. ly/2kLp3eG).



Full Documentation and Live Chat In-App: Quickly access relevant knowledge base articles or search our full documentation library directly from the Clarity Human Services application. Authorized users can also chat directly with our dedicated HMIS help desk or request an immediate call-back via phone.

Documentation that shows financial stability, including recent increases in sales and customer retention without signs of defaults, extended terms, and other signs of financial hardships – see Section 9.1

See "Qualifications & Experience" on page 50.

Conformance to all the terms and scope, and demonstrate the full functionality of all HUD standard system reports.

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. 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.

The ability to meet the transition timeline

Not applicable. The Clarity Human Services HMIS is already fully implemented in Long Beach.

3.3 Project Timeline

Ability to meet the fast-paced Timeline: Month 1: Kick off meeting, System admin training, Data element mapping (HUD data elements, custom data elements, services, and assessments // Month 2: Formatting and mapping of data/documents transitioning from other software system. Project configuration System configuration End user training End of July: All HUD data elements migrated and available in live-site // Month 3: August 1st: Go-live in new system Assessment and Case Management migrated and available in live-site // Month 4: 1) Custom Data elements (services, notes, contacts, etc.) migrated and available in live-site\ // Month 5: 1) File attachment migrated and available in live-site

Not applicable. The Clarity Human Services HMIS is already fully implemented in Long Beach.

7.1 System Features

7.1a) Client intake and update functionality.

Client intake

Adding a client profile is as easy as pressing a button and filling out basic questions on pre-built or custom profile creation screens. Once the client record has been created, the end-user can easily manage ROI permissions, upload a client photo, or navigate a suite of case management functions.

(i) Centralized module independent of program enrollments that records historical changes made to each field and indicates last time intake was updated.

Clarity Human Services Audit Log

Clarity Human Services records historical changes made to each field and provides complete auditing records on all client data entry screens. This includes a full record of historical changes made to each field that indicates the last time intake was updated. A Log Link is presented at the bottom right of the screen on every page, 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 end-user who made the update are all historically presented in a concise format. The audit log is a centralized module independent of program enrollments.

Client History

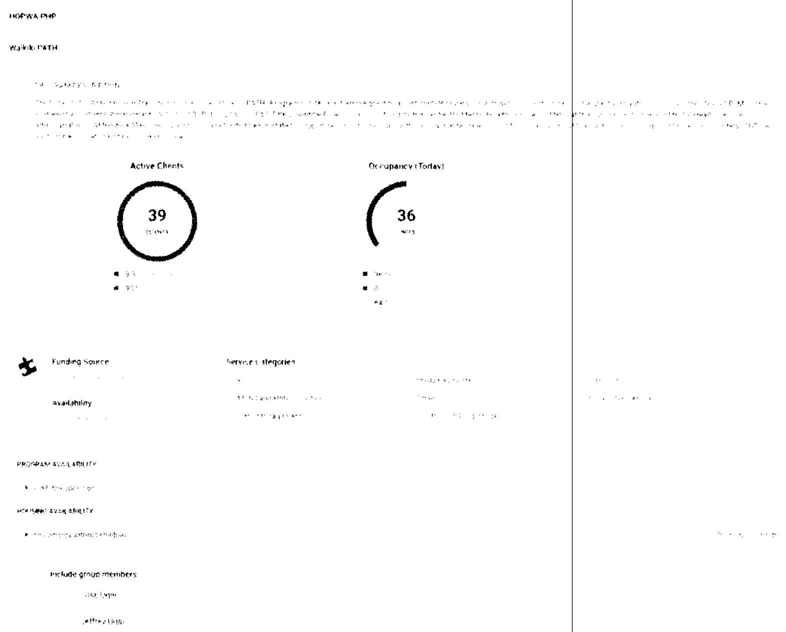
Additionally, the Client History Tab provides a consolidated overview of activity for a client record. Here the end-user can view and conduct advanced, filtered searches on all client activities (program enrollments and exits, service transactions, assessments, referrals, reservations, etc.), listed in a color-coded fashion. Note that the items included in a client's history tab will directly coincide with the sharing permissions of the client, agency, program, and the end user's access role. So, in short, they can only view what they are authorized to view.

(ii) Ability to track benefit eligibility and participation. (Desired)

Clarity has automated the ability to track benefit eligibility and participation. Clarity Human Services automates eligibility screening, streamlining participation tracking and goal-setting to provide easy integration of benefits enrollment in performance measurement and program evaluation. Features include:

- **Automated eligibility screening**: Take the manual work out of the eligibility screening process with a robust and highly configurable eligibility engine.
- **Program Goals**: Set program-wide or client-specific goals and tie them back to measurable outcomes, such as enrollment in mainstream benefits programs. Clarity Human Services will automatically track clients' progress towards the goal based on their latest status assessments.

7.1b) Ability to create, record, and track



Program Enrollment: Clarity Human Services takes the guess work out of program enrollment with real-time bed/unit inventory management, reservations and referrals, and automated eligibility screening.

referral (type, status, follow up), eligibility, and participation data

Referrals, Eligibility, and Participation Data

Clarity Human Services is built around the concept of assessment and referral; thus, the ability to create, record, and track referral (type, status, follow up), eligibility, and participation data is seamlessly integrated into the system.

Ability to Create, Record, and Track Referrals

Clarity Human Services is built around the concept of referrals. Thus, it goes well above and beyond simply notifying project staff when an incoming referral has been received. The referral is what sets the very cogs of Clarity Human Services into motion.

The ability to refer clients to programs with or without eligibility criteria, match and prioritize those referrals based on specific criteria, and manage referrals across multiple programs is a key functionality of Clarity Human Services and an essential component of coordinated entry process management. There are two main methods by which clients can be referred to programs. The first is direct referrals, where a client is referred directly to one or more programs. The other involves the client being referred to the Coordinated Entry waitlist called the Community Queue, where referrals will be reviewed for program eligibility and prioritization by a designated staff member.

Referrals can be made from two different locations in the client record:

- The Referrals tab: when the user wants to directly refer the client to a specific program regardless of eligibility criteria
- The Assessments tab: when the user wants to directly refer the client to a program based on eligibility criteria or refer a client to the Community Queue

Clarity Human Services includes a complete referral system with robust tracking and reporting. Referrals are made and accepted or denied within a few simple clicks. Whether the referral is the direct result of an assessment or generated by a staff member who is proactively screening the waitlist for eligible clients, the robust eligibility engine automates program eligibility screening, ensuring the referral is swift and accurate. Moreover, the referral can be made based on real-time unit inventory information. In fact, a reservation can be made simultaneously along with the referral using the Clarity Human Services Reservation System, which provides real-time inventory management and reservations for both long-term and daily attendance services. This tool enables staff members to understand current and anticipated availability with real-time unit inventory management—including support for reservations to prevent duplicate referrals to the same resource. The Reservation System allows for batch entries for multiple household members simultaneously, and it is also scan card compatible. System administrators can ensure that the information is provided to relevant end-users through the use of access roles.

The Referrals section allows for documentation of client-specific attributes such as subpopulation type, ADA needs, etc. You can have the system automate finding document-ready clients, and it 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 staff member that they are ready for placement. Regarding case conferencing, referral-specific case notes, a full referral history, and automated eligibility screening facilitate secure collaboration between navigators and provide an ideal platform for case conferencing.

When the change in status generates a referral, it is easy for end-users to communicate this change in status via customizable referral notification alerts, which can be delivered either via in-app message and/or external email (without client PII). Or, for more advanced applications, our API can be used to power notifications via third-party providers such as Twilio.

Tracking Referrals by Type, Status, And Follow-up

Referral-Specific Ad Hoc Data Analysis and Data Visualization
Clarity Human Services includes a data analysis tab in the coordinated entry section of the system. The analysis tab extends Clarity's power business intelligence tool and is designed specifically for referral monitoring and outcome tracking. In addition to quick viewing and sorting of the Community Queue (i.e., waitlist), this agile tool provides additional details such as CES intake data, housing navigation assignment, and ad-hoc referral information such as housing match and housing placement.

Pre-built Reports
Bitfocus designed the pre-built reports listed below to assist with referral and tracking and provide an overall understanding of how referrals are being used in the community. These reports answer questions such as:

- Which clients are being referred, their assessment scores and subscores, and who conducted the assessment?
- Which clients are getting assessed by my agency?
- Which staff is conducting the assessment?
- Who is getting assessed but not referred, either directly or to a waitlist?
- Who is on the waitlist?
- What referrals are coming to my agency?
- What referrals is my agency making?

Eligibility

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 level. 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. The Eligibility Engine automates program eligibility screening and aids housing navigators in quickly screening for eligible clients for particular programs from the project level.

Participation Data

Clarity Human Services automates eligibility screening, streamlining participation tracking and goal-setting to provide easy integration of benefits enrollment in performance measurement and program evaluation. Features include:

- **Automated eligibility screening**: Take the manual work out of the eligibility screening process with a robust and highly configurable eligibility engine.
- **Program Goals**: Set program-wide or client-specific goals and tie them back to measurable outcomes, such as enrollment in mainstream benefits programs. Clarity Human Services will automatically track clients' progress towards the goal based on their latest status assessments.

Each referral has a history section, allowing users to see the lifecycle of a referral from creation to completion. For detailed information on what referral history is collected, you can read our help center article Viewing a Referral's History by going to https://bit.ly/366Wdtr.

7.1c) Ability to implement electronic consent form

Clarity Human Services has the ability to implement electronic consent forms. Release of Information forms, including e-signature, can be electronically compiled, stored, and managed from within the client record. This includes the ability to de-identify/segregate the records of non-consenting clients, automatic expiration reminders, and a full audit trail for the consent form.

Features

- **Multi-Level Configuration**: ROIs can be required and standardized at the system- or CoC-level, meaning that all agencies within the system or the CoC (in communities with more than one CoC) will share the same requirements and language for their ROI. However, there is the ability for the system administrator to 'override' this blanket approach for specific agencies that require a unique ROI language and/or requirements. Different documentation requirements can be applied at the various levels (e.g., electronic signature, pdf upload, verbal consent, outside agency verified, etc.)
- **Anonymous Clients**: Clients who refuse consent can still be entered into the system; however, the ability to enter (and subsequently access) their PII will be restricted to specific users with authorized access roles. This enables the community to track anonymous clients and include them in their aggregate reporting.
- **ROI maintenance**: mass ROI 'clean-up' tools are available to system administrators, including the ability to mark all ROIs as expired at the click of a button. Also, the system can be configured to have ROI status appear next to the client's name in client search results.
- **ROI Expiration:** As for ROI expiration, this is achieved via the Compliance Expiration setting within the ROI configuration screen. The Compliance Expiration setting allows system administrators to set the threshold at which end users will begin seeing a Compliance Warning on the client record. Options are 5 days, 10 days, 15 days, 1 month, 2 months, and 3 months.

7.1d) Integrated intake for mobile devices (phone and tablet)

The Clarity Human Services application is optimized for mobile devices and can be accessed on any device that supports a modern web browser. Mobile users enjoy full access to the data system functionality and several additional mobile-specific features such as signature, photo crop, and location capture that take advantage of mobile devices' unique capabilities.

Clarity Human Services also features a dedicated mobile outreach and encampments tool to support outreach providers working with encampments and other difficult-to-serve populations. This functionality allows you to track encampments as well as individuals who live outside of an encampment. Authorized users can also complete Coordinated Entry assessments and—where appropriate—reserve housing and service resources from the field.

7.1e) ID scanning technology-based intake (ID cards)

Clarity Human Services includes a tool that allows the user to take photographs of clients directly from the web browser or mobile device and create photo-ID cards with a personal barcode. These barcode scan cards can then be used for high-volume check-ins to shelters, bed nights, and other services/housing, including on tablets and/or other mobile devices.

7.1f) Document and file uploading capability for City staff

Users can upload forms, files, photos, scans, and other documents into a client record. You can also scan documents (either on a mobile device or external scanner) and upload them directly to a client record using the web photo upload feature. This same feature also allows users to quickly take and crop photos from within the Clarity Human Services application, eliminating the need to upload photo files for a client profile photo.

To facilitate referrals, System Administrators can designate the types of documents required for program enrollment. From there, Clarity Human Services automatically flags clients as "Document Ready" when their record contains all required document types.

There are no storage limits for files uploaded to the system. All files uploaded to the system, whether to the client record or a specific agency, are encrypted at levels that exceed industry standards. By default, all Clarity Human Services traffic is 2,048 bit SSL encrypted at transit and at rest.

Alternatively to uploading files, System administrators (and agency managers, if access role allows) can create custom PDF document templates that are both readable and printable and include an electronic signature. This is an excellent option when translating paper forms to electronic format.

7.1g) Ability to create and modify client assessment forms with weighted scoring

Custom Assessment Forms in Clarity Human Services

Clarity Human Services allows you to build your own community-specific, scored assessment(s) rather than requiring that you use a pre-existing tool. You can also create your own scoring processors for those assessments. The powerful data field editor and screen designer tools allow for creating custom assessments at the system, agency, and program levels. These forms can include conditional factors, jump logic, and incorporate pre-existing data to inform form attributes. In addition, administrators can use the Assessment Score Processor tool to create custom scoring.

Creating Custom Fields and Forms

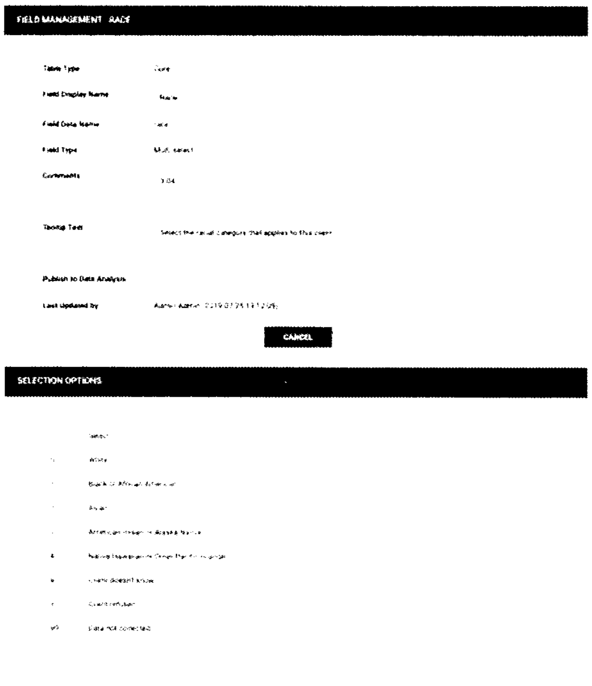
The easy-to-use Field Editor and Screen Designer built into Clarity Human Services allows for the custom creation, via drag-drop, of intelligent data entry forms and assessments built around automation and intake logic. These intelligent forms include the ability to embed conditional factors, jump logic, and use pre-existing data to inform the attributes displayed on the form.

Field Editor

Depending upon your needs, Clarity Human Services allows you to either copy 'system' fields and then customize the response items to meet local priorities and/or create entirely new custom fields - whichever option suits your particular purpose(s). Regardless, numerous field types are available, including:

- **Text**: intended for short text strings.
- **Textbox**: displays a larger area for collecting longer text strings, like notes and descriptions.
- **Number**: only integer responses will be accepted.
- **Dollar**: only accepts integers and will record '.00' at the end of recorded responses.
- **Checkbox**: creates a toggle button field.
- **Date**: collects integers in xx/xx/xxxx format.
- **Phone**: collects integers in xxx-xxx-xxxx format.
- **Picklist**: fields with drop-down menu options.

System administrators can also add comments (visible only to system administrators) and tooltip text to clarify data entry tasks and purposes for each field (visible to end-users). And, upon creating a custom field, the user will have the option to include it in the data analysis tool.



Screen Designer

Pre-configured system screens are available to system administrators. These screens collect common data, such as the HUD HMIS Data Elements. These screens can be copied to create custom screens by populating the screen with custom fields and a workflow that meets local priorities. System administrators can also create new screens that are fully populated with data fields custom to their needs.

Custom Assessments Scoring Processor

- Use existing core fields or custom fields
- Each score can include complex criteria across multiple assessment questions.
- Scores can include subscores and weighted scoring
- Scores can have custom groupings that can later be used to filter the Community Queue (i.e., waitlist)

Multiple score processors can be applied to a single assessment, if necessary. So, for example, a system administrator can easily duplicate one of the standard OrgCode assessments that are already built-in to Clarity Human Services and tailor them by adding custom data fields and custom scoring formulas – making for compelling prioritization tools tailored to your local priorities.

7.1h) Ability to match homeless clients and appropriate housing and service resources based upon assessment responses and housing eligibility requirements

Clarity Human Services allows for manual referrals and automated referrals based on customizable eligibility requirements. Clarity Human Services includes everything required to determine eligibility at both the client and project level. Clarity's 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. The Eligibility Engine automates program eligibility screening and aids housing navigators in quickly screening for eligible clients for particular programs from the project level.

7.1i) Ability to maintain and bed and unit inventory and track real time occupancy and availability of beds and units

Bed and unit availability is tracked in real-time in Clarity Human Services, using a combination of project inventory and enrollment data. Clarity Human Services supports real-time inventory management (i.e., bed and unit) and reservations for long-term and daily attendance services of external provider agencies and internal programs for information and referral purposes. This inventory availability is tracked using a combination of project inventory and enrollment data. Users can 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. Reservations can be made simultaneously with the referral, and reservations can be dated into the future, with the ability to select various bed arrangements that are most suitable for the client. The Reservation System also allows for batch entries for multiple household members simultaneously. It is also scan card compatible. The Reservation tool and Attendance module offer graphical room/bed management in the form of a filterable, sortable calendar with multiple views. The Referrals module has a section dedicated to unit inventory that allows for a visual view of the state of the unit inventory. Finally, when conducting an assessment, eligibility and availability for each relevant program result will be plotted and graphed within the assessment results screen. System administrators can ensure that the information is provided to relevant users through the use of access roles.

We are also pleased to announce the introduction of Clarity Human Services: INVENTORY. Expanding on the base HUD HMIS data standards, inventory introduces the ability to manage your physical housing inventory directly from Clarity Human Services.

With this new model, you'll be able to track housing inventory in a more detailed manner. Rather than setting up housing inventory at the Program/Project level, with this update, you'll be able to set up Sites, Buildings, and Units, with the ability to assign Programs, Funding, and even Eligibility criteria. Reporting will also be built around this new model to maintain compliance with the HUD Data Standards and federal regulations.

7.1j) Prioritization of clients on Master List/ By-Name List, waiting lists, etc.

Customizable Prioritization

Prioritize your clients on the Master List/By-Name List and more with the Community Queue features in Clarity Human Services. The Community Queue features collectively serve as a customizable prioritization tool (i.e., priority list; waitlist), helping CoCs manage the inventory of community housing resources and services available and ensuring that those persons with the greatest need and vulnerability receive the resources needed to resolve their housing crisis.

The Community Queue is equipped with advanced search functionality that allows navigators to filter and sort their searches based on several variables. There is only one client record for each client, and all Coordinated Entry information is available within that record. You can also link to the client record directly from its listing in the community queue. Other features include:

- **Customizable Prioritization and Waitlist Management**: Maintaining an accurate and timely waitlist of eligible persons seeking housing can be challenging-- particularly for large continuums. Clarity Human Services offers a variety of tools to aid communities in managing their waitlist. Features include the ability to distinguish active vs. inactive clients based on system activity, "snooze" clients to remove them temporarily from the waitlist, and interactive reporting to gain insight into system inflow, wait times, and placements.

- **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 for documentation of client-specific attributes such as subpopulation type, ADA needs, etc. Regarding documentation ready status, this is 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.

- **Referral Notifications**: These customizable referral notification alerts can be automatically delivered 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.

Multiple Community Queues

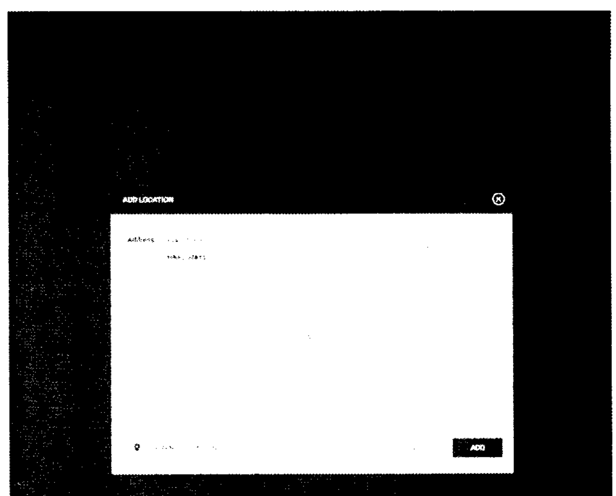
One important thing to note is that you can have up to ten different community queues in your Clarity system, each of them for a different purpose, such as Shelters, Transitional, Navigation, or Permanent Housing. Clients can be listed on up to five different Community Queues simultaneously, with their respective position on each queue maintained.

7.1k) Ability to prepare Housing Assistance Payment Contracts, unit inspection reports, and payment records. (Desired)

In Clarity Human Services, system administrators have the ability to configure their programs and projects in a multitude of financial/budget allocation models, including the ability to map various and multiple funder contracts to a single program. It allows them to 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



Custom Fields and Reporting: Local System Administrators can add and report on custom fields and forms to support almost any data collection or reporting need, including GIS and SDoH fields.

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 sub-granted funding sources and attach them to programs and services.

7.1l) Printing of individual client records. (Desired)

Yes, selecting a conveniently positioned Print icon on the client profile page allows the end-user to print entire client records or individual segments of the client record— such as client reports, case notes, forms, client history, photo ID card, and profile screens—without leaving the client record.

7.1m) Assessments/history of services provided (i) Client profile page that provides a summary of programs and services utilized. (Desired)

The Client History Tab provides a comprehensive look at the history for a given client from within the client record. All client activities are automatically recorded in the Client History Tab. From there, users can view and conduct advanced, filtered searches on all client activities (service transactions, assessments, referrals, reservations, etc.), listed in a color-coded fashion. Note that the items included in a client's history tab will directly coincide with the sharing permissions of the client, agency, program, and the end user's access role. So, in short, users can only view what they are authorized to view.

Each program also features a History Tab with a filterable record of all the client's activities within that program.

For a general client summary, users may run the [CLNT-125] Client Summary report. This report provides a summary of the client's housing history, coordinated entry information, and a list of all agencies that have provided services for the client. The Client Summary report is housed in the client-level reports, which are accessed and run directly from the client profile screen.

7.2 Reporting

7.2a) Ability to separate reporting by contract for multi-funded projects

Advanced report filtering allows users to easily separate reports based on contracted funding sources for programs with blended funding streams. Support for multiple funding streams enables organizations to rely on HMIS as their sole source of reporting for all their funders, increasing the incentive for adoption and reducing the burden of duplicate data entry or manual reporting.

7.2b) Ability to meet federal, state, county and local reporting requirements

We have nearly 20 experience developing and administering HMIS implementations. At Bitfocus, we started our journey as HMIS System Administrators, translating federal, state, and local grant guidelines and program regulations into compliant technology solutions that advance sustainable solutions to homelessness. Today, we continue to serve as System Administrators for many of our largest implementations. As such, we have skin in the game when it comes to full and punctual compliance with the HUD data standards and other applicable regulations. To ensure we're on top of evolving requirements, we actively participate in the HUD Vendor Workgroup and assist directly in the testing and development of data standards and programming specifications to the greatest extent we're able. Our hard work has paid off with a consistent track record of meeting or beating established HUD deadlines.

Clarity's pre-built report library generally has all of the HUD and federal partner reports you'll need. But if you require a report that's not in there, you can easily create, save, and send one using Clarity's built-in Data Analytics tool.

7.2c) Ad hoc reporting functionality that allows users to generate reports at client, program, agency, and system levels.

Both standard and ad-hoc reporting functionality allow users to generate reports at the client, program, agency, and system levels. For example, authorized users can run a HUD System Performance Report for a specific program, an agency, the CoC (as per official specs), or the system as a whole. Individual HUD System Performance Measures (SPM) are also available in our Data Analysis tool to include in custom dashboards and ad-hoc queries. These categories can be further grouped by funding source.

7.2d) Ability to export raw data in csv/xls, and, ability to export reports to PDF for portability

Reports can be saved in multiple formats such as CSV, PDF, Excel, and other formats. We do not currently support Microsoft Word exports. All standard Report Library reports feature print options of Microsoft Excel (.xls), Adobe PDF (.pdf), and Web Page.

For raw data, authorized users can use the data analysis API, which does not require data transformation. It can produce exports in the following formats: PDF (for dashboards), CSV, Excel Spreadsheet (XLSX), HTML, JSON, Markdown, PNG (Image of Visualization), and TXT (tab-separated values).

Customers can also define custom exports to be downloaded directly, scheduled for regular SFTP upload, or access problematically via a RESTful API structure. Regardless of the method, all exports and reports are generated in real-time, with no delay between data entry and availability for export and analysis.

7.2e) Programmatic access to data via a well-documented API (JSON over Rest preferred)

Data Import, Data Export, and Data Analysis APIs

Our Clarity Human Services and Clarity Human Services Data Analysis APIs offer programmatic access to data import and exports using a standard RESTful architecture. These two APIs support integrations with other systems and applications. Both APIs utilize a RESTful architecture and are well-documented in our knowledge base. For raw data, authorized users can use the data analysis API, which does not require data transformation. It can produce exports in the following formats: PDF (for dashboards), CSV, Excel Spreadsheet (XLSX), HTML, JSON, Markdown, PNG (Image of Visualization), and TXT (tab-separated values).

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

In addition to the APIs, Clarity Human Services offers multiple other ways of importing and exporting both HUD and community-defined data elements. Options include:

- **HUD CSV/XML Formats**: Standard HUD CSV and XML formats are included in the Report Library. Both formats can be uploaded using our Data Import Tool (DIT) (additional fees apply for this tool). HUD XML data can also be imported using the Clarity Human Services API.
- **Custom Data: Custom Data can also be imported via the Data Import Tool (DIT);** we extend the HUD XML schema to accommodate custom data elements. Users can also create custom export schemas using our Data Analysis Tool in numerous formats (including JSON and XML) for one-time or scheduled export.
- **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.

Data Integration Documentation

All integration options are well documented in our Help Center found at bit.ly/ClarityHSMigrate. Also, the same Clarity Human Services Help Center includes an integrated, live Data Dictionary that provides easy reference to all system, HUD, and custom fields configured in the HMIS. Our

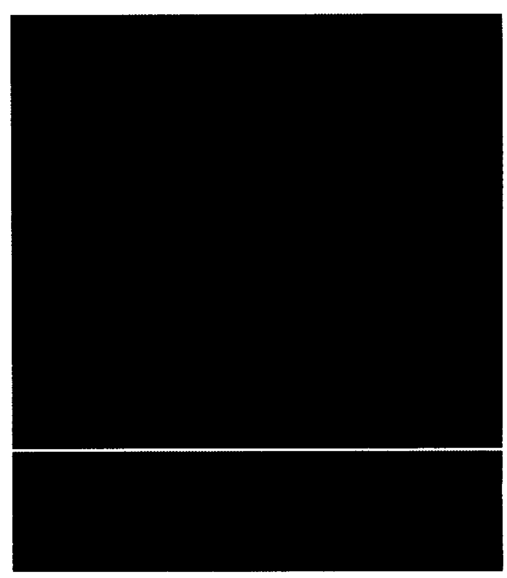
Clarity Human Services **Data Import Tool**

The Clarity Human Services Data Import Tool (DIT) provides system administrators with a powerful suite of data import tools designed to help communities bring both HUD as well as locally-defined client data into HMIS.

Full Support for HUD HMIS CSV and XML Standards
Our Data Import Tool supports federal formats for CSV and XML exports of HMIS data. Your standard license fee includes regular maintenance and updates to the latest release of the HUD Data Standards.

RESTful API
For programmatic access to your Clarity Human Services HMIS, the Data Import Tool includes a full RESTful API, allowing for automated imports into the system. (XML Only)

Custom Fields and Data
By extending the HUD XML schema, the Data Import Tool supports the import of customer-defined data elements. (XML Only)



data structure uses clear naming conventions and straightforward table structures, and we make a full Entity Resource Diagram (ERD) available to support custom reporting and local analysis.

7.2f) Ability to query data fields and/or provide access to data fields via common reporting methods (e.g. integration with commonly used business intelligence tools or data warehousing solutions)

Clarity Human Services features an ad-hoc data analysis tool that provides authorized users with the ability to query data fields and report them with ease. Clarity allows for simple 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 automatically translated to this tool, making it possible to report on service data from all possible angles. Reporting and Data Analytics in Clarity Human Services run against real-time changes to the Client Database—ensuring your team is always working with the most current information available.

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.

Third-Party Visualization Systems:

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

7.2g) Ability to schedule and automate report generation, including automated email report delivery

Scheduled pre-built 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 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.

7.2h) Protocols for handling report requests that are too burdensome to generate through the user interface (i.e. reports for very high-volume programs, CoC System Performance Measures Report)

Our reporting infrastructure is designed to handle large reports and exports—including reporting for multi-CoC systems and high-volume programs—on-demand, without special accommodations or procedures. Reports in Clarity Human Services run on a separate server, so you can continue to use your system without any slowdown while large reports are running. The below summarizes the average runtime for various reports:

	Average	Small CoC	Large CoC
Runtime	[illegible]	[illegible]	[illegible]
Length of Time Homeless	[illegible]	[illegible]	[illegible]
HUD Point-in-Time Count	37.95 Seconds	15.50 Seconds	118.47 Seconds
HUD Data Quality	[illegible]	[illegible]	[illegible]
Project-Level APR	17.35 Seconds	18.95 Seconds	8.16 Minutes
LSA	[illegible]	[illegible]	[illegible]

Clarity Human Services **Data Analysis**

We built accessible business intelligence and data analytics directly into the Clarity Human Services platform giving everyone access to fresh, reliable data.

Easy access to powerful insights
Clarity Human Services demystifies data exploration, providing drag-and-drop analysis and visualization tools anyone can understand.

Data Analysis API
Our RESTful Clarity Human Services Data Analysis API provides secure, real-time access to client data, system performance, and other insights

Custom Fields and Data
Our data analysis tools include full support for customer-defined fields. No additional fees or services required.

Direct database access
For advanced needs, connect directly to our database servers to integrate third-party statistical and analysis tools (Tableau, Crystal Reports, etc.)

That said, our Data Services and Technical Support teams stand ready should the need arise. Exports resulting in large file sizes can also be scheduled for regular upload via SFTP or other means as necessary.

7.2i) Data visualization tools and/or ability to integrate with third party data visualization systems to maximize the visibility of key performance indicators. (Desired)

Data Analysis Tool

Clarity Human Services features an ad-hoc data analysis tool that allows 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) are automatically translated to this tool, making it possible to report on service data from all possible angles.

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.

Third-Party Visualization Systems

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

7.2j) Provide geolocation for outreach activities

In Clarity Human Services, there are a couple of ways to track geolocation information for outreach activities. It can be assigned to screens and services to track individual client data. We have also developed the Outreach module to track Outreach activities at a community-wide level.

Adding Geolocation Fields

System Administrators can add geolocation fields to screens and services within the system. Clarity Human Services adds geospatial context to HMIS data using information captured by GPS or automatically geocoded from manually entered locations. Data can then be applied to maps and other visualizations using the built-in Data Analysis tool or exported for further analysis in tools such as ArcGIS©. The Explore tab of the Data Analysis tool supports map-based visualizations, exportable in various formats.

Clarity Human Services Outreach

Built using Esri's ArcGIS platform, Outreach offers new ways for service providers to engage with clients in the field to analyze geospatial data about their unsheltered community members. Designed to support the progressive engagement of clients and street encampments, this tool also allows you to track the physical movement of people and encampments over time, enabling you to report on and thereby understand trends ranging from risk factors to support and service provision.

Feature Highlights

- **HMIS, Meet GIS**: Empower your community to understand better where and what is occurring in your continuum. Location-aware technology lets users drop a pin, redirect to your exact location, limit search suggestions to a geographic area, smart predict searches, and so much more.
- **Customize the information that gets pulled in**: Pick the geolocation fields you want to include in your Outreach map to track all the various points in the system where client locations and location-based services can be tracked.
- **Serve People & Encampments**: Draw encampments and place service interactions/client location directly on the map. View current and historical summary encampment data, and zoom in to access individual client records
- **Map Layers**: Analyze interactions and outcomes within a geographic area using HUD CoC boundaries or custom maps.

7.2k) Thorough and continually updated report documentation (including data models, data dictionaries) for standard reports that shows data sources from the database and describes purpose and uses of the report. (Highly Desired)

Report Documentation

Bitfocus offers extensive online report documentation, including data models and data dictionaries, for Clarity Human Services pre-built reports and the ad-hoc data visualization 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.

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.

Ad-Hoc Data Visualization Tool Reporting Documentation

The Bitfocus Data Services Team releases updates to the Clarity Human Services Ad-Hoc Data Visualization 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 (get.clarityhs.help/) dedicated to the Ad-Hoc Data Visualization 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.

7.3 Customer Service

7.3a) Installation and Customization:

(i) Comprehensive conversion strategy from the existing system, Clarity Bitfocus, including outlining estimated time needed for conversion and verification of data accuracy.

Not applicable, Clarity Human Services is already the HMIS for the Long Beach CoC. No migration is necessary.

(ii.)Ability to migrate data across systems on demand without limits on frequency and volume and in HUD standard CSV and XML format.

Clarity Human Services includes the ability to generate both standard HUD and custom data exports in CSV or XML format. Likewise, our Data Import Tool (DIT) and Data Import API allow for importing HUD CSV and XML formatted files. We also support the importing of custom data elements by extending the HUD XML schema. There are no limits on frequency or volume in either case, with authorized users able to migrate data across the system on-demand.

(iii) Coordinate activities related to the implementation and installation of the HMIS.

Not applicable, Clarity Human Services is already the HMIS for the Long Beach CoC. No migration is necessary.

(iv.) Structure for receiving feedback on future software development.

We keep in touch with our customers and want them to have an active voice in the ongoing development of Clarity Human Services. The main way is through the Product Roadmap, where all our customers can share their development ideas, and other customers can upvote their ideas. We review and respond to technical support requests in an average of 30 minutes. Bitfocus is a regular participant in the HUD HMIS Vendor Work Group, and we have always completed HUD-mandated data standards updates on time. Continue reading for more detailed information.

Customer Engagement Protocol

We view ourselves as collaborative partners in our customer's effort to end homelessness in their communities. We rely heavily on their feedback to guide the development of Clarity Human Services and shape our efforts to improve our services continuously. Here are a few of the ways we engage our customer base.

- **Slack Group**: Join your peers on our Bitfocus Community Slack workspace, clarityHS.slack.com. Open to all Clarity Human Services users, our Slack community offers a forum for frank and open discussion about emerging issues, best practices, new ideas.
- **Product Roadmap and Idea Board**: Customers can view the current product roadmap, offer comments and feedback, or suggest new features and functionality via an online customer forum. The roadmap also provides easy reference to track feature ideas, upcoming development, and recent releases.
- **Help Center**: The Clarity Human Services Help Center (get.clarityhs.help) includes full documentation, how-to guides, videos, and other resources to help communities maximize the return on their investment.
- **Newsletters**: We send regular updates on upcoming features, best practices, events, and other news via our email newsletters.
- **Bitfocus Help Desk**: 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 99.5%+ satisfaction rating.
- **Surveys and Research**: We use surveys, usage statistics, and other analytics to understand better how users interact with our software and services.
- **Regular Check-ins**: Our Customer Success team regularly reaches out to communities to gain proactive feedback on their needs and experiences with Clarity Human Services.
- **Annual Customer Conference**: Our annual customer conference, Clarity Connect, offers Clarity Human Services users an opportunity to meet face-to-face with Bitfocus staff and each other.

- **Industry Events**: Bitfocus is also engaged in the broader homeless data community, with staff regularly attending or presenting at national homelessness and HMIS events, including the National Human Services Data Consortium (NHSDC) and the National Alliance to End Homelessness (NAEH) conferences.

(v.) Protocol for receiving, reviewing, and responding to both automated and requested software fixes in agreed upon timeframe.

Yes, see the note above. Additionally, we have a fair and well-documented process in all of our contracts regarding service-level review.

Feature Enhancements, Issues, Errors, and System Bugs

- **Issue Tracking and Response:** The Customer Support Team responds to all initial support tickets within 30 minutes. 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.

Feature Enhancement Notification Process

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

- **Customer Notification**: First, customers are notified via our email newsletter(s) and help center, including full documentation of any new features and functionality.

- **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.

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

(vi).) Participation in the HUD HMIS Vendor Work Group and willingness to make required changes within a certain timeframe.

HUD HMIS Compliance

Regarding compliance with the Federal HMIS Data Standards, we do more than meet deadlines (which we historically met consistently and dependably). Through our participation in the HUD HMIS Vendor Workgroup, our role as an HMIS System Administrator, and our partnership with organizations such as NHSDC and NAEH, we are helping to lead the conversation around the development of HMIS standards and best practices.

HUD HMIS Vendor Work Group

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. We are quick to seize any opportunity to participate in developing 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.

7.3b)Training and Support

(i) Train-the-trainer service to City staff as part of the installation process.

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 City of Long Beach system administration team with a full system administration training and a train-the-trainer session to prepare the City of Long Beach 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 end-user experience. Our Learning and Development team partners with our own system administrators to create in-depth content to 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.

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

(ii) Provide ongoing technical support for the duration of the contract

System Administrators have direct access to our technical support team throughout the duration of the contract. 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 with an average of 8 years of customer support experience and experience in the human services industry. Many have worked as caseworkers, case managers, and even system administrators. They know the unique challenges that your end-users face and are eager to provide customized solutions. We offer end-to-end support from various angles to ensure that your system administrators and their end-users are comfortable--and even savvy--users of Clarity Human Services.

(iii)Provide after-hours emergency support. (Desired)

Our standard customer support hours are from 5 AM to 5 PM, Pacific Time, Monday through Friday. If after-hours support is required, we can establish an SLA to cover after-hours support. We also operate an extensively automated infrastructure monitoring system, ensuring 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.

(iv) Provide training and support materials for user navigation

Online Help Center

All staff has access to online documentation, which can be found at get.clarityhs.help. This online documentation is appropriate for users of all types, from volunteers to agency managers to system administrators. It's chocked full of helpful videos, how-tos, workflows, and other helpful documentation to ensure that learners of all types feel not only confident when they use Clarity Human Services, but savvy. This site also offers additional technical documentation, including a data dictionary, data schema, and custom reporting guidance.

Learning Management System (LMS)

Bitfocus also offers a standalone Learning Management System (LMS), a dedicated site that provides access to a comprehensive curriculum of on-demand training, with learning paths dedicated to various user roles and functional areas of the system. For more information or to view sample courses, visit learn.bitfocus.com.

In-Application Support

Our in-app Help widget on the bottom right of each page provides instant access to relevant help desk articles and other resources directly from within the Clarity Human Services interface.

(v) User Acceptance Test (UAT) procedures and test environment for every upgrade, patch, enhancement, and other system changes

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 before release to the production site, allowing the end-users to test the new features before release.

(vi) Designated training environment

The proposal includes two separate Clarity Human Services instances: (1) the [Client Name] production instance and (2) a dedicated training environment. The training environment includes full reporting functionality and is updated in tandem with the production instance. To ensure clear separation between training and production environments, each operates from a dedicated URL.

(vii) Integrated ticketing system for users (~200) and system administrators (3)

See item (ii) above. The integrated ticketing system is available for system administrators. It may be possible to add access for other users for an additional cost, but this would be done through a separate SLA.

(viii) Well-coordinated patch release timing, content, communication, and testing

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. 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. For an example of such communication, please see https://get.clarityhs.help/hc/en-us/articles/360025765654.

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

- **Customer Notification**: First, customers are notified via our email newsletter(s) and help center, including full documentation of any new features and functionality.
- **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.
- **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.

(ix) Ability to receive feedback via user forums. (Desired)

Yes. We view ourselves as collaborative partners in our customer's efforts to end homelessness in their communities. We rely heavily on their feedback to guide Clarity Human Services' development and shape our efforts to improve the services we offer continuously. Our product board, ideas.

bitfocus.com, allows customers to view the current product roadmap, offer comments and feedback, or suggest new features and functionality via an online customer forum. The roadmap also provides easy reference to track feature ideas, upcoming developments, and recent releases.

Please see the answer to question 7.3a for more information.

(x) Ability to integrate with other City service providers on data integration projects.

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. These systems include hospitals, local law enforcement agencies, and others. Our Data Import and Data Analysis APIs provide a robust toolkit for programmatic access to the case management system—without limits on frequency or volume. Furthermore, all of our standard agreements include contractual commitments to support 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. We support integration of CSV, XML, custom data elements, .pdf, .jpg, .docx., and other file types.

7.4 System Administration

7.4a) Solution Hosting and Maintenance

(i) Provide all requisite infrastructure, data backup/recovery/storage, security, and application functionality for the duration of the contract

Bitfocus provides all required infrastructure, data backup/recovery/storage, security, and application functionality for the duration of the contract. Data is stored at our Las Vegas, Nevada, data center. This data center employs established best practices for physical access control, including round-the-clock security and technical staff, dual-actor authentication access, biometric scanners, and monitored security cameras. Off-site backup and supplemental storage are hosted in the AWS Cloud. Please see the attached Disaster Recovery Plan for backup, restoration, and recovery procedures.

Our standard customer support hours are from 5 am to 5 pm PST, Monday through Friday. In the event after-hours support is required, we can establish an SLA to cover after-hours support. We also operate an extensive, automated infrastructure monitoring system, ensuring that the platform's environment is always operational and available. Our engineering team is notified immediately if an issue does arise, which further ensures that emergencies are minimized. We staff our help desk with experienced CoC and HMIS experts ready to assist users via email, phone, or chat.

Data is stored at our Las Vegas, Nevada data center. This data center employs established best practices for physical access control, including round-the-clock security and technical staff, dual-actor authentication access, biometric scanners, and monitored security cameras. Off-site backup and supplemental storage are hosted in the AWS Cloud. By default, all Clarity Human Services traffic is 2,048 bit SSL encrypted at transit and rest. All API traffic must be further AES encrypted. Each customer instance of Clarity Human Services operates under a separate hostname (i.e., ochca.clarityhs.com) with a dedicated MariaDB database dedicated to it. Other customer data is never intermixed. Employees with access to customer data are required to sign confidentiality agreements, and their use of the system is logged for auditing purposes.

(ii) APIs/SOAP/XML DataStream procedures exist to create a near real-time link between the live Database and a local copy at DHHS Homeless Services Division.

Yes, Clarity Human Services was designed with integration capabilities, including two APIs.

Data 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.

Getting Data Into And Out Of The System

Clarity Human Services offers multiples ways of importing and exporting both HUD as well as community-defined data elements. Options include:

- **HUD CSV/XML Formats**: Standard HUD CSV and XML are included in the Report Library. Both formats can be uploading using our Data Import Tool (DIT) (additional fees apply for this tool). HUD XML data can also be imported using the Clarity Human Services API.

- **Custom Data**: Custom Data can also be imported via the Data Import Tool (DIT); we extend the HUD XML schema to accommodate custom data elements. Users can also create custom export schemas using our Data Analysis Tool in various formats for one-time or scheduled export.

Automating and Scheduling 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 using a standard RESTful architecture. 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.

  » Clarity Human Services API: Our Clarity Human Services API allows for importing and exporting HUD HMIS XML and custom fields using a standard RESTful architecture.

  » Data Analysis API: Our more flexible Data Analysis API allows programmatic access to the business intelligence and ad-hoc reporting tools built into

Clarity Human Services.

Additional Methods

- **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 Data Services team can create a custom ETL solution. This is an excellent solution where complex business rules of unique use cases apply.

7.4b) Coordinated Entry System

(i) Provide environment, tools, and resources to ensure tracking Coordinated Entry related activities, incuding:

(1) Provide editable modules dedicated to Coordinated Entry.

Yes, Clarity Human Services has Coordinated Entry functionality built-in to the modules within the system, and you can edit your Coordinated Entry processes and activities as needed to match your community's priorities. 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 and local custom tools and best practices. The Coordinated Entry waitlist in Clarity Human Services is called the Community Queue. System Administrators have the ability to create up to ten different community queues in the system, each for a unique purpose.

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 and referral. Thus, the system provides the underlying structure that CoCs need to generate CE reports with clients ranked by vulnerability score, generate by-name lists by special population, and much more.

(2) Allow seamless integration of HUD required data elements; specifically, regularly update templates to align with HUD requirements

As HMIS system administrators ourselves, Bitfocus has boots-on-the-ground knowledge and a commitment to HUD compliance. Clarity Human Services is fully adaptable to all HUD-recommended Coordinated Entry configurations while remaining compliant with the Coordinated Entry data standards. HUD-required data elements and templates are kept updated in the system, so you can rest assured that you will be collecting all required Coordinated Entry data.

Fully compliant with HUD 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 and local custom tools and best practices. Your community will need to determine its 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

(3) Ability to submit, edit, and track referrals. (4) Ability for agencies to be notified via email and alerts within the system when a referral is submitted and updated. (5) Ability for end users to receive notification when agency updates referral

Clarity Human Services has a Referrals module built directly within the system. Referrals are made within the client profile and managed within the Referrals tab. Assigned case managers can see the referrals that are pending to them under their own caseload tab. Referral notification alerts can be sent via an in-app message and/or external email (without client PII) upon referral. You also have the option to create custom reports to track referrals and assign those reports to dashboards or to be automatically sent out, so the users you need to keep informed about referral updates will always have the current information.

Here is some additional information about Clarity's powerful Assessment and Referral features:

- **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. Regarding documentation ready status, this is 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 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 can reject a referral with a documented reason with a simple dropdown menu.

(ii) Ability to map the prioritization and determination of services related to Coordinated Entry, including the

(1) Ability to create a custom priority list based on criteria defined by the Long Beach CoC.

Yes, you have the ability to create up to 10 custom priority waitlists (community queues) based on your own unique criteria. Then you can track the placement and performance of each queue in your Coordinated Entry System.

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):

- Create a primary queue for basic Coordinated Entry

- 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.

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 Coordinated Entry reports that provide client-level 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

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-level.

- **Data Analysis Tool**: Likewise, the Data Analysis tool does quick 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).

(2) Create and edit services that link to program enrollments

Yes, you can configure services linked to program enrollments, meaning that they will automatically be assigned a suite of designated services for that program as soon as a client is enrolled in a program. Clarity Human Services allows for two types of services:

- **Stand-alone Service Items**: Service Items recorded under the Services tab in the client profile and not associated with a program enrollment.

- **Program-based Service Items**: Service Items recorded in association with a program enrollment. There are two ways to assign program-based services. The first way is to have them automatically assigned upon enrollment, and the second way is to assign them from within the program once the client is enrolled.

Program-based Service Items can be assigned to a single program or any number of additional programs. They can also be configured to be not associated with any program (stand-alone), or to both programs and services, or to services only (meaning they can be assigned outside of program enrollment).

7.4c) Local Administrator Functions:

(i) Ability to map multiple funder contracts to programs and to track performance outcomes separately

Yes, from the front-end 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 allows a system administrator the ability to configure their programs and projects in a multitude of financial/budget allocation models. The ability to map various and multiple funder contracts to a single program is included in this feature set. It allows them to 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 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 include queries and dashboards created with our Data Analysis tool

(ii) Program, performance target, and contract configuration capability

Administrators can set custom program performance targets based on HUD or custom data elements. Associated dashboards and reports can be pinned to user's start pages or distributed automatically via email (or other means). Clarity Human Services includes program, performance-target, and contract configuration capability. The Clarity Human Services program configuration functionality allows for creating a very flexible workflow for any program, including the ability to integrate non-HUD programs into the system and capture unique workflows and performance metrics that may differ from the standard workflows of other programs. Unique goals, funding sources, eligibility requirements, contracts, automated service delivery, documentation requirements, and myriad other configuration options ensure that the program is set up and configured in a method that ultimately leads to better data quality and performance analytics.

(iii) Data merge/de-duplication capability

Yes, Clarity features a Data Merge tool right on the user interface. System administrators and other users 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). 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.

The system administrator can also easily scan the system for duplicate records using an agency-based report that lists duplicate clients in that agency. For more detailed reporting, users can search for duplicates and analyze the system for potential errors using the Data Quality data model in Clarity's business intelligence tool.

(iv) Allow for flexible multi-funding project and service customization

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 their communities' unique needs and priorities. Administrators can also create custom assessments from scratch.
- **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 advanced customizability of Clarity Human Services allows the HMIS Lead to customize any workflow in the system significantly. Customizable program templates are handy for this purpose, as they aid System Administrators in the consistent and efficient management of each program type's unique data collection requirements.

- **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 include 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, 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 end-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, 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 between agencies and agency departments. Data sharing is easy, reliable, and allows for integration between systems while providing high-security functions.

(v) Open/close functionality for client and program records

Deleting or closing a full client record:

When necessary, Clarity does include the ability to delete client records. However, it is easy for system administrators to reopen a deleted record should the need arise. Moreover, there are ways to "close" a client record by using sharing settings to shield it from those who do not need access. The sharing settings in Clarity Human Services are multiple layers deep, meaning there are numerous ways for an agency to protect one of their client records - both from outside agencies (i.e., using the Agency share controls) and also from users within their own agency (i.e., using the Departmental share controls). Therefore, once a client has exited the care system, it is possible to maintain the client record for reporting purposes while still keeping it "closed" from those who do not need access but open to those who still need to access it.

Opening and closing program records (entering and exiting a client from a program):

As for opening and closing program records - this is easy. Clarity Human Services functionality includes:

- **Program enrollment (i.e., 'open')**: Program enrollment screens contain the same features as all other screens in Clarity Human Services (e.g., display logic, calculations, etc.). Batch entry is available with Program enrollment, so if the client is part of a household/family, you will be prompted to select family/household members to include in the enrollment.

- **Program Exit (i.e., 'close'):** Like Program enrollment screens, Program exit screens also offer a streamlined data entry experience. If enabled by the system administrator, much of the data will cascade from previous status assessments to pre-populate the Program exit screen. Batch entry is available for Program Exit screens, too, so the user can quickly exit all household members from the same program simultaneously. If the client is scheduled for services that will occur after the program exit date, these services will appear at the bottom of the Exit page, where you can end date them.

Once a program is closed, the client's history for the program is still easily accessible within the client record and can be edited if necessary.

(vi) User management for accounts(s) access and password

Authorized users can easily create, activate, and deactivate users, quickly edit agency and project associations, and create and assign locally-defined access roles.

They can assign individual access roles to a user or group of users to dictate which areas of the system they can view, read/write/edit/delete, and how those roles relate to agencies they are potentially sharing data with. Updating contact information and other information is just as easy via the staff profile.

The HMIS Lead can easily assign access to agencies and programs to any end-user, and HMIS Administrators can de-activate or terminate accounts at the click of a button.

Clarity Human Services allows end-users to set their own passwords and change them when necessary. Password reset tokens automatically expire to prevent abuse. (This functionality can be enabled/disabled by the system administrator at the system level.)

(vii) Ability to partition the view/access of data by user, program, and organization

Individual access roles are assigned to a user to dictate which areas of the system they can view, 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 end-user is denied access are eliminated from view, providing a seamless user experience on any access role. It is possible to define and create an unlimited number of access roles associated with varying access levels down to a granular level, including the field-level—more information @ bit.ly/ClarityHSAccessRoles.

- To partition the view/access of data by user, you would use access roles. Individual access roles are assigned to a user to dictate which areas of the system they can view, 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 end-user is denied access are eliminated from view, providing a seamless user experience on any access role.

- To partition the view/access of data by program, you would use Departmental share settings, which allow you to dictate how data is shared within an agency.

- To partition how data is shared between organizations, you would use Agency share settings, which allow you to dictate how data is shared across agencies.

(viii) Ability to create and manage rules for data elements collected, including the ability to hide or mask individual project-specific client data elements

Clarity offers numerous options to create and enforce data collection rules and mask/hide project-specific data elements.

Data entry screens include built-in form logic and validation that streamline the data entry process and provide error correction in real-time as users enter data. For further customization, system administrators can add custom interactive error messages; modify field labels, tooltips, display logic; and customize validation requirements to match local needs.

Also, universally sensitive PII, such as a social security number, is automatically masked on the screen (i.e., blurred). Neither the user nor a casual observer can obtain that information for undue purposes. Specific access roles can be created to temporarily permit/prohibit users from revealing the social security number for editing purposes.

For more granular control, place privacy flags on sensitive data elements, notes, files, or entire client records to allow for the exclusion of individual data elements from general sharing/access agreements.

And finally, conditional logic (i.e., display constraints) ensures accurate data entry into Clarity Human Services. It also removes or "hides" excess data fields that do not apply to the client, allowing users to enter meaningful data. Any field in the system can be used as a constrained field or a constraining field.

(ix) Ability to create and manage custom assessments including conditional and/or jump logic

Yes, there are multiple ways to create and manage rules for collected data elements. Conditional logic (i.e., display constraints) ensures accurate data entry into Clarity Human Services. It also removes or 'hides' excess data fields that do not apply to the client, allowing users to enter meaningful data.

With Display Constraints, system administrators can control how fields display on screens based on responses entered in previous fields. For example, if a user marks that the gender of a client is female, then a pregnancy question will also appear. However, if the user records a client's gender as male, this option will not appear. Any field in the system can be used as a constrained field or a constraining field.

Additionally, Clarity Human Services is equipped with Advanced logic. This allows 3 or more constraints to be added to a single field using nested AND/OR conditions.

(x) Ability to re-order data fields and pages

The easy-to-use Field Editor and Screen Designer built into Clarity Human Services allows for custom screen creation via drag-drop. These intelligent forms can include conditional factors, jump logic, and incorporate pre-existing data to inform form attributes.

(xi) Ability to access data fields programmatically via a well-documented API

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. As such, our APIs are fully exposed for integration with other applications. We are committed to a standards-based approach that aligns with modern industry best practices. Our APIs use a RESTful architecture and conform with established best practices and widely adopted code frameworks.

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 using a standard RESTful architecture. These two APIs support integrations with other systems and applications. Both APIs are well-documented in our knowledge base.

- **Clarity Human Services API**: Our Clarity Human Services API allows for importing and exporting HUD XML and custom fields.

- **Data Analysis API:** Our more flexible Data Analysis API allows programmatic access to the business intelligence and ad-hoc reporting tools built into Clarity Human Services.

(xii) Ability to access data fields via commonly used business intelligence tools such as PowerBI, Tableau, etc. (Desired)

Yes, this can be done through the Customer Data Model. Clarity Human Services supports direct access to a real-time replica of your client data for advanced reporting and backup applications, allowing you to run custom queries or connect third-party tools like Tableau® or PowerBI®.

(xiii) Ability for read access tolive/near-live data for on-demand

querying and analysis. (Desired)

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://get.clarityhs.help/hc/en-us/articles/360025647433-Data-Refresh-Rate.

All ad hoc reporting functionality provides near real-time data. The Explore tab of the data analysis tool can be made available to any user with the related license. The standalone tool allows for more advanced queries and exports of the database. As the use and complexity of the data analysis tool have evolved, some changes have been necessary to ensure the tool continues to have a high level of performance. As a result, the time from when a user changes data in Clarity Human Services to when those changes appear in the data analysis tool may not always occur in real-time (i.e., 'near real-time). The data refresh rates fall into the following categories:

- **Real-time**
- **Persist**: When initially accessing the data analysis tool, then will persist for the pre-defined amount of time until refreshed.
- **Triggered**: Refreshed at a pre-defined time(s) during the day

(xiv) Ability to communicate via notifications, alerts, messages, and reminders at the system-, organization-, program-, client-, and user-level. (Highly Desired)

The messaging and notification features in Clarity Human Services allow users to securely share and collaborate while ensuring sensitive information is properly protected.

- **Inter-system Messaging**: Clarity Human Services is equipped with an inter-system messaging system that securely allows staff members to communicate with other staff members. System-wide emails are accessed here as well.
- **Client-Level Public Alerts**: End users can also create Public Alerts to alert other users (system-wide) to any pertinent information regarding the client (e.g., they have mail, or they're up for housing).
- **Referral Notifications**: Clarity Human Services also includes customizable referral notification alerts that can be delivered via in-app message and/or external email (without client PII). The system administrator can also post user alerts on the login screen of the Clarity Human Services application.
- **Calendar Notifications**: Clarity Human Services also offers an integrated Calendar, which may be subscribed to through an external email client such as Outlook. Custom events and reminders can be created using the Appointment tool and synced securely to the staff member's calendar. This includes support for Outlook, Google Calendar, Apple iCal, and other popular calendaring services.
- **Program-Level Notifications and Alerts**: Automated notifications remind caseworkers of pending program referrals, status assessment due dates, and the expiration of client consent forms.

For more advanced applications, the alerts feature in our Data Analysis Tool can be used to trigger email notifications, hit a Zapier webhook, or send notifications via third-party providers such as Twilio. These alerts are highly customizable, allowing authorized users to set the title, conditions, recipients, frequency, and permissions associated with each notification.

(xv) Ability to configure user page and data field views. (Desired)

Yes, the administrator can control the User Page and workflows based on user role and agency level through a variety of techniques:

- **Custom Navigation Profiles**: At the agency level, the Navigation Profiles feature will allow you to control which tabs are available to an agency and their arrangement (i.e., how the system appears to the end-users in this agency. Once configured, the Navigation Profile can then be assigned to an agency or several agencies.
- **Custom User Dashboards**: At the user level, 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. These dashboards act as 'home screens' for that individual.
- **Access Roles:** Also at the user level, Access Roles, which are created by the system administrator and assigned to the individual end-user (or group of users at the same user level), determine the type of access to data and functionality (read/write/edit/delete) that users with this particular access role will experience.

They can control data field views through display logic and data validation. Also, privacy flags on sensitive data fields, notes, files, or entire client records allow for more granular control and exclude individual data elements from general sharing/access agreements. When configuring screens and forms, custom tooltip explanations can be assigned to any data field in the system to assist users. Default values are provided for HUD HMIS data elements.

Section 8: Warranty/ Maintenance and Service

The length and terms of the warranty/ maintenance and service provided for the software product shall be provided.

Standard Service Level Agreement (SLA)

Our standard arrangements provide for continuous access twenty-four ("24") hours a day, seven ("7") days a week, with guaranteed continuous service between 5 AM and 9 PM PST, Monday through Friday (holidays excluded). Further, we guarantee a Monthly Uptime Percentage of at least 99.9% during any monthly billing cycle (see the Master Agreement for Services for guarantee conditions and remedies).

Hosting Facilities

Hosting will be provided at facilities with standards meeting or exceeding Uptime Institute Tier III guidelines. The hosting facility will provide the appropriate physical and electronic security, redundant systems, and internet connectivity to ensure maximum service security, availability, and performance.

Contractors must specify if subcontractors will perform warranty/maintenance/service, location(s) where warranty / maintenance / service will be performed, along with contact name and phone number for each location.

Bitfocus does not rely on subcontractors for any warranty, maintenance, or service work for this project.

Section 9: Company Background and References

9.1 Primary Contractor Information

Company ownership. If incorporated, the state in which the company is incorporated and the date of incorporation. An out-of-state Contractor must register with the State of California Secretary of State before a contract can be executed (http://www.sos.ca.gov/business/).

Bitfocus is a Nevada S Corporation founded in 2003. We maintain active registration as a foreign corporation with the California Secretary of State (Registration Number: C4117177).

Location of the company offices.

We are headquartered in Las Vegas, Nevada, with staff located throughout the United States.

Location of the office servicing any California account(s).

Our corporate headquarters in Las Vegas, Nevada, serves all customer accounts.

Number of employees both locally and nationally. Specify the number of full time and part-time employees residing in Long Beach.

85+ Employees. We have full-time employees living and working throughout the United States. While we have a substantial California-based team, no one currently resides in Long Beach.

Location(s) from which employees will be assigned.

We are a distributed, fully remote company headquartered in Las Vegas, Nevada, with staff throughout the United States. Employees will be assigned based on specialty and role.

Name, address and telephone number of the Contractor's point of contact for a contract resulting from this RFP.

The following persons are authorized to represent Bitfocus in contract negotiations:

Jeff Ugal
Chief Operating Officer
(808) 378-7080
jeff@bitfocus.com

Cameron Shorkey
Director of Business Development
(719) 300-5522
camerons@bitfocus.com

Company background/history and why Contractor is qualified to provide the services described in this RFP.

About Bitfocus

Founded in 2003, Bitfocus became the Long Beach continuum's HMIS vendor last October. Built from the bottom up to serve the unique needs of homeless service and housing providers, Bitfocus equips 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 are honored by the opportunity to work with the CoC, its partner agencies, and funders. Beyond Long Beach, our Clarity Human Services HMIS software is quickly becoming the homeless data platform of choice for the nation's highest-performing communities. We proudly partner with some of the nation's largest continuums in Southern California and beyond, including LAHSA, San Francisco, Santa Clara County, Boston, and statewide implementations in Colorado, Nebraska, Nevada, Rhode Island, and Wisconsin.

We Live and Breathe HMIS

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.

SaaS Built for HMIS

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, and the results speak for themselves—Bitfocus is the fastest-growing HMIS vendor in the market.

Company History

Bitfocus launched in 2003 with our enlistment as HMIS System Administrator for Las Vegas, Nevada. Our legacy vendor certainly didn't make the job easy. Confident we could do more with a better, less cumbersome software, we built Clarity Human Services from the ground up to be the HMIS software we'd 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. From first outreach to program exit, Clarity Human Services facilitates a client's full journey through the service delivery system—connecting the dots between initial engagement, assessment, intake, and program placements while empowering decision-makers with actionable information for program improvement, service planning, and reporting.

And today, nearly 18 years later and 85 employees stronger, Bitfocus is still committed to leading the development of the next generation of tools and technology that will empower human services professionals to serve their clients better.

Length of time Contractor has been providing services described in this RFP to the public and/or private sector. Please provide a brief description.

18 years. Since our inception in 2003, we have worked closely with numerous private, non-profit, and public entities that provide services to the homeless. We got our start as system administrators for the state of Nevada. In 2012, we released our Clarity Human Services software. Steadily growing ever since, we currently serve 51 CoCs across 40 implementations.

Resumes for key staff to be responsible for performance of any contract resulting from this RFP.

See "Key Staff Resumes" on page 44.

Financial stability: Proposers must provide financial statements giving the City enough information to determine financial stability. These statements may include, but are not limited to: (a) Financial Statement or Annual Report; (b) Business tax return; (c) Statement of income and related earnings. The level and term of documentation required from the proposer to satisfy the City will be commensurate with the size and complexity of the contract and proposers should submit accordingly. If the information submitted by the proposer, or available from other sources, is insufficient to satisfy the City as to the proposer's contractual responsibility, the City may request additional information from the proposer or may deem the proposal non-responsive. The City's determination of the proposer's responsibility, for the purposes of this RFP, shall be final.

See "Qualifications & Experience" on page 50.

9.2 Subcontractor Information

- Does this proposal include the use of subcontractors? (Yes ____, No _X_ Initials _JSU_)

No. We do not rely on third-party subcontractors.

9.3 References

Contractors should provide a minimum of five (5) references from similar projects performed for state and/or large local government clients within the last three years. Information provided shall include: Client name; Project description; Project dates (starting and ending); Staff assigned to reference engagement that will be designated for work per this RFP; Client project manager name and telephone number.

Client name: Los Angeles Homeless Services Authority (LAHSA)

Project description: Homeless Management Information System vendor
Contract Start Date: November 1, 2016
Staff assigned to reference engagement that will be designated for work per this: Mazharul Islam, Director of Data Management
Client project manager name and telephone number: 213-797-4631

Client name: City of Pasadena

Project description: Homeless Management Information System vendor
Contract Start Date: January 1, 2017
Staff assigned to reference engagement that will be designated for work per this: Daniel Cole, Program Coordinator I
Client project manager name and telephone number: 626-744-8315

Client name: Regional Task Force on the Homeless (San Diego County)

Project description: Homeless Management Information System vendor
Contract Start Date: August 1, 2018
Staff assigned to reference engagement that will be designated for work per this: Tamera Kohler, CEO
Client project manager name and telephone number: (858) 292-7627 x40

Client name: County of Riverside

Project description: Homeless Management Information System vendor
Contract Start Date: January 1, 2021
Staff assigned to reference engagement that will be designated for work per this: Gordon Kuang, Business Process Analyst II
Client project manager name and telephone number: 951-206-3691

Client name: Community Alliance for the Homeless - Memphis/ Shelby County CoC (TN-501)

Project description: Homeless Management Information System vendor

Contract Start Date: June 13, 2019

Staff assigned to reference engagement that will be designated for work per this: Tara Williams, HMIS Director: 901-527-1302 ext 304

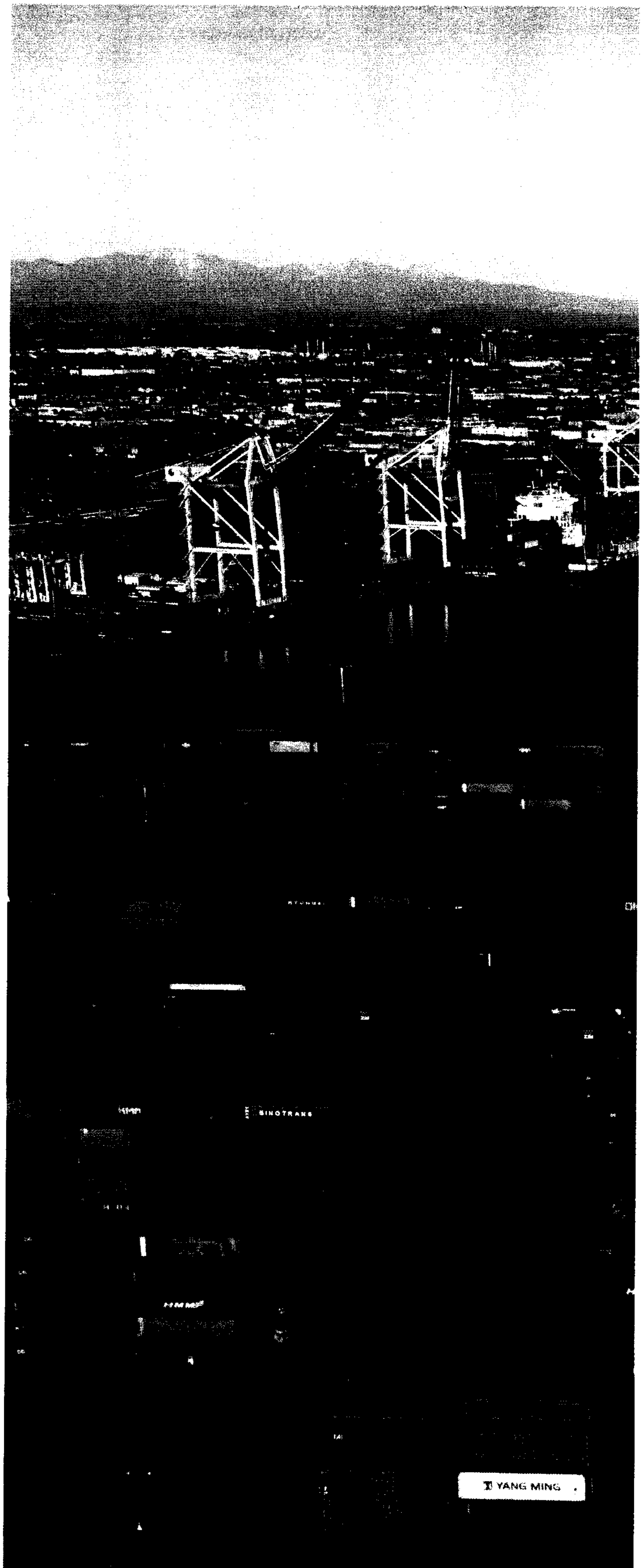


EXHIBIT “B”

Budget

Bitfocus

City of Long Beach CoC - HMIS (CA-606)

City of Long Beach
1301 W. 12th Street
Long Beach, CA 90813
United States

Reference: 20211028-101451766
Quote created: October 28, 2021
Quote expires: October 28, 2022
Quote created by: Cameron Shorkey
Solutions Consultant
camerons@bitfocus.com
+1 (800) 594-9854

Products & Services

Item & Description	Quantity	Unit Price	Total
Licensing: Enterprise User Enterprise User License Count: 203 Per-User Monthly Rate: $25.00	203	$780.00 / year	$60,900.00 / year after $97,440.00 discount for 1 year
Licensing: Administrator User System Administrator User License Count: 4 Per-User Monthly Rate: $150.00	4	$1,800.00 / year	$7,200.00 / year for 1 year
Add-On: Data Analysis (Standalone) Standalone monthly per seat license $100.	4	$1,200.00 / year	$4,800.00 / year for 1 year
Add-On: Data Analysis (Embedded) Embedded monthly per seat license $10.	50	$120.00 / year	$6,000.00 / year for 1 year
Data Integration Tool (DIT)	1	$7,200.00 / year	$7,200.00 / year for 1 year
Data Analysis Tool (System)	1	$6,000.00 / year	$6,000.00 / year for 1 year
Training Site License	1	$3,000.00 / year	$3,000.00 / year for 1 year

General LMS Training Access Access for 120 users per year over 12 months with the first month unlimited access. LMS general training also gives Long Beach Analytics access for up to 3 administrators for the full year. ($3.50 per user per month)	1	$5,040.00	$5,040.00 for 1 year
Comprehensive Needs Analysis, Dashboard Development & Training This project includes (for more detail, please see Purchase Terms): - Analysis of local goals and priorities, evaluation of different configuration options, and development of detailed metrics and specifications for proposed dashboards, visualizations, and other necessary project components. - Four Custom Dashboards to meet community needs. - Three Data Analysis Tool Training Sessions. - Ten Consultation & Support Hours	1	$43,000.00	$43,000.00

Subtotals

Annual subtotal	$95,100.00 after $97,440.00 discount
One-time subtotal	$48,040.00

Total $143,140.00

Purchase Terms

Comprehensive Needs Analysis, Dashboard Development & Training: $43,000

This project includes:

- **Analysis of local goals and priorities, evaluation of different configuration options, and development of detailed metrics and specifications for proposed dashboards, visualizations, and other necessary project components.**
    - 3-5 Stakeholder Engagement Sessions
    - 3-5 Design Sessions
    - Analysis & Design Recommendations Summary
    - Post-project Roadmap

- **Four Custom Dashboards to meet community needs.**
- **Three Data Analysis Tool Training Sessions:**
    1. **Clarity Data Analysis Tool Overview**: Data models, where to find what you need, query examples, dashboards
    2. **Advanced, Topic-specific Session**: Focused around a topic/problem identified by Long Beach team (i.e. CE monitoring, data quality monitoring, program outcomes, etc.)
    3. **Follow-up Session**: Opportunity to ask questions and troubleshoot queries built since initial training sessions

- **Ten Consultation & Support Hours:**
    - A block of prepaid support hours that can be used as needed to explore best practices, configuration options, and other topics with a Bitfocus subject matter expert. This option allows for the most flexibility as the hours can be used to explore any topic at any time.
    - Support hours are available in blocks of at least ten hours and must be used within one year of purchase. They can also be combined with other options.

- **Project Phases:**

Phase 1: Requirements Gathering (including stakeholder input)
Phase 2: Analysis
Phase 3: Solution Design
Phase 4: Dashboard Development
Phase 5: Quality Assurance
Phase 6: Implementation
Phase 7: Training

Questions? Contact me

Cameron Shorkey
Solutions Consultant
camerons@bitfocus.com
+1 (800) 594-9854

Bitfocus
5940 S Rainbow Blvd, Ste 400 #60866
Las Vegas, Nevada 89118-2507
United States

EXHIBIT “C”

City’s Representative:

Erica Valencia-Adachi, Homeless
Administrative Operations Officer
2525 Grand Ave, RM 235
Long Beach, CA 90815
562.570.4017

EXHIBIT "D"

Contractor's Key Employee:

Jeff Ugai - Chief Operating Officer

5940 S Rainbow Blvd Ste 400 #60866

Las Vegas, Nevada 89118-2507
808.378.7080

Resolution of Signing Authority

WHEREAS, the Corporation is determined to grant signing and authority to certain person(s) described hereunder.

RESOLVED, that the Board of Directors is hereby authorized and approved to authorize and empower the following individual to make, execute, endorse and deliver in the name of and on behalf of the corporation, but shall not be limited to, any and all written instruments, agreements, documents, execution of deeds, powers of attorney, transfers, assignments, contracts, obligations, certificates and other instruments of whatever nature entered into by this Corporation.

Name: **Jeffrey Ugai**
Position/Title: **Chief Operating Officer**
Telephone Number: **(808) 378-7080**
Email Address: **jeff@bitfocus.com**

Signature:

The undersigned certifies that he/she is the properly elected and qualified Secretary of the books, records and seal of Bitfocus, Inc., a corporation duly conformed pursuant to the laws of the state of Nevada, and that said meeting was held in accordance with state law and with the Bylaws of the above-named corporation.

This resolution has been approved by the Board of Directors of Bitfocus, Inc. (Company) on January 3, 2022.

I, as authorized by the Company, hereby certify and attest that all the information above is true and correct.

Signature:
Email: robh@bitfocus.com
Title: CEO
Company: Bitfocus

2003
CORPORATION
Bitfocus

Robert Herdzik
Founder, CEO, and acting Corporate Secretary

Contracting Authority

Final Audit Report 2022-01-05

Created:	2022-01-03
By:	Jeff Ugai (jeff@bitfocus.com)
Status:	Signed
Transaction ID:	CBJCHBCAABAATQ6cphigZ35Mqb6c3MxldHaMulir30V8

"Contracting Authority" History

Document created by Jeff Ugai (jeff@bitfocus.com)
2022-01-03 - 4:29:00 PM GMT- IP address: 24.165.53.5

Document emailed to Robert Herdzik (robh@bitfocus.com) for signature
2022-01-03 - 4:37:27 PM GMT

Email viewed by Robert Herdzik (robh@bitfocus.com)
2022-01-03 - 4:37:28 PM GMT- IP address: 72.14.199.254

Document e-signed by Robert Herdzik (robh@bitfocus.com)
Signature Date: 2022-01-05 - 5:47:24 PM GMT - Time Source: server- IP address: 68.108.165.128

Agreement completed.
2022-01-05 - 5:47:24 PM GMT