



**Request for Proposals for:**

Coordinated Entry Evaluation for the Eastern PA Balance of State Continuum of Care

**Issue Date:**

Friday, June 25, 2021

**Proposals Due:**

No later than 5:00PM Eastern Time Friday, July 23, 2021

**Submission Instructions:**

Email proposals to [easterncoc@pennsylvaniacoc.org](mailto:easterncoc@pennsylvaniacoc.org) with the Subject “Response to RFP for Coordinated Entry Evaluation.”

**Questions:**

Email questions to [easterncoc@pennsylvaniacoc.org](mailto:easterncoc@pennsylvaniacoc.org) with the Subject “Question about Coordinated Entry Evaluation RFP” no later than 5:00PM Eastern Time on Friday, July 16, 2021.

**RFP, Selection, and Contracting Timeline**

The CoC anticipates the following timeline. Applicants are welcome to propose a shorter timeline for the project.

RFP issued	Friday, June 25, 2021
Deadline for submission of questions to <a href="mailto:easterncoc@pennsylvaniacoc.org">easterncoc@pennsylvaniacoc.org</a> with Subject “Question about Coordinated Entry Evaluation RFP”	Friday, July 16, 2021, 5PM Eastern Time
Deadline for submission of proposals to <a href="mailto:easterncoc@pennsylvaniacoc.org">easterncoc@pennsylvaniacoc.org</a> with Subject “Response to RFP for Coordinated Entry Evaluation”	Friday, July 23, 2021, 5PM Eastern Time
Eastern PA CoC Governing Board Review of Proposals	Monday, July 26, 2021 - Friday, August 6, 2021
Conduct interviews, if necessary	Monday, August 9, 2021 – Friday, August 20, 2021
Issue Notice of Intent Award	Monday, August 23, 2021
Complete contract negotiations	Friday, August 27, 2021
Commencement of Contract	Tuesday, September 7, 2021
Completion of Evaluation/ Final Report Prepared	Monday, February 28, 2022
Presentation of Final Report to Full CoC Membership	Monday, April 18, 2022

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## Introduction and Background

The purpose of this RFP is to obtain the professional services of a firm or individual, hereinafter referred to as the “Applicant”, to perform service for the Eastern PA Balance of State Continuum of Care (BoS CoC), hereinafter referred to as the “CoC”, in evaluation of the Coordinated Entry (CE) system for all individuals and families who are homeless or at imminent risk of homelessness. This includes examining the existing components of the current CE system and process, recommending needed changes, and ensuring that the process works most effectively for the households it is designed to serve. The work is to be done in collaboration with the Eastern PA BoS CoC governing board.

The mission of the Eastern PA Continuum of Care (CoC) is to end homelessness throughout its geographic region, which encompasses 33 counties, primarily rural, in the eastern part of Pennsylvania. The Eastern PA CoC receives ~\$15 Million in CoC Program funding. Representatives of relevant organizations in these counties have come together to establish the CoC in order to carry out specific responsibilities laid out by the federal government in advancing efforts to end homelessness.

The Eastern PA CoC includes 33 counties located in five regions, represented by Regional Housing Advisory Boards (RHABs):

- Central Valley – Columbia, Cumberland, Juniata, Lebanon, Mifflin, Montour, Northumberland, Perry, Schuylkill, Snyder, Union
- Lehigh Valley – Lehigh, Northampton
- Northern Tier – Bradford, Clinton, Lycoming, Sullivan, Susquehanna, Tioga, Wyoming
- Pocono – Carbon, Monroe, Pike, Wayne
- South Central – Adams, Bedford, Blair, Cambria, Centre, Franklin, Fulton, Huntingdon, Somerset



The [Connect to Home: Coordinated Entry System of the Eastern PA CoC \(CES\)](#) coordinates and manages access, assessment, prioritization and referral to housing and services for people experiencing or at imminent risk of homelessness in the CoC's geographic area. HUD requires that all communities have a Coordinated Entry System, which prioritizes limited homeless-dedicated resources to households who for without the assistance would not be able to prevent or resolve their homelessness. Prioritization is based on assessment of household's vulnerability, barriers to resolving their housing crisis, and homelessness history. The Coordinated Entry System is a critical tool to support communities prevent homelessness for households at imminent risk of homelessness and move those experiencing homelessness to permanent housing as quickly as possible in a trauma-informed manner.

To design and implement the Coordinated Entry system in the 33 counties that comprise the Eastern PA CoC, the CoC established a Coordinated Entry Committee and engaged Capacity for Change, LLC for ongoing consultation on system design, policies, and operational procedures and processes. The Coordinated Entry Committee and Capacity for Change, LLC report to the CoC's governing board. The CoC governing board is the body facilitating the Coordinated Entry evaluation, via a third party selected through this RFP process, to identify changes needed to improve the system design and related policies and procedures.

## **Project Scope of Work**

### Coordinated Entry Evaluation Background

Conducting an annual evaluation of the Coordinated Entry process established by the Continuum of Care is required by [HUD Notice CPD-17-01](#). Through this RFP, the selected Applicant will provide an evaluation of the Eastern PA BoS CoC Coordinated Entry System and make recommendations for system improvement based on that evaluation. The Eastern PA BoS CoC has budgeted a maximum of \$40,000 for the evaluation and culminating report of observations and recommendations.

The evaluation will focus on the quality and effectiveness of the entire coordinated entry experience, including access/intake, assessment, and referral process, for both participating projects and participants/ people experiencing homelessness who use the system. HUD requires a CoC's annual Evaluation Plan to be incorporated into its Coordinated Entry Policies and Procedures. The intent is to understand:

- how to make our CE system better in a way that improves the user experience and movement out of homelessness to housing for participants
- if our system is not meeting / compliant with HUD's requirements, what changes need to be made
- how effective the CE process is in connecting people experiencing homelessness to appropriate referrals: exploring system need, time to referral, referral appropriateness, and referral outcomes
- how effective the CE process is in diverting households from homelessness through referrals to homelessness prevention and community resources

- whether the CE process has been implemented / is currently operating as intended and in accordance with the CoC's established policies and procedures

According to HUD, the CoC must facilitate ongoing planning and stakeholder consultation concerning the implementation of coordinated entry. Through this evaluation process, the CoC aims to meet HUD's requirement that CoCs solicit feedback at least annually from participating projects and from households that participated in coordinated entry during that time period. Such solicitations must address the quality and effectiveness of the entire coordinated entry experience for both participating projects and households, and appropriate feedback methodologies include: surveys designed to reach either the entire population or a representative sample of participating providers and households; focus groups of five or more participants that approximate the diversity of the participating providers and households, incorporating a focus on understanding how different populations (veterans, households fleeing domestic violence, people experiencing chronic homelessness, and youth) experience and are served by the Coordinated Entry System and how different project types (street outreach, emergency shelter, transitional housing, rapid re-housing, and permanent supportive housing) experience the system; and individual interviews with participating providers and enough participants to approximate the diversity of participating households,

**Applicants are encouraged to use their expertise and experience to develop an appropriate scope of services based on the budget available. Applicants are welcome to propose an alternative timeline to complete the scope in less than 6 months.** The evaluation should consider all aspects of the Key Elements / Core Requirements of Coordinated Entry and provide recommendations on how to improve the system's effectiveness, efficiency, and user experience. The CoC expects the selected Applicant to focus its evaluation on:

- [Compliance with HUD's Coordinated Entry Requirements](#) regarding planning, access, assessment, prioritization, referrals, data management, and evaluation as described in [HUD's Coordinated Entry System Self-Assessment tool](#) and make recommendations for each topic addressed in the evaluation
- HUD's Coordinated Entry Management and Data Guide (Chapter 4) <https://www.hudexchange.info/resources/documents/coordinated-entry-management-and-data-guide.pdf>
- evaluation approaches described by HUD CPD in its April 16, 2019 Strategies for Evaluating and Monitoring Coordinated Entry <https://nhsdc.org/wp-content/uploads/2019/05/2.1.6-Strategies-for-Evaluating-and-Monitoring-Coordinated-Entry.pdf>

The evaluation should rely on multiple sources of data:

- Interviews and/or focus groups with key stakeholders such as CE operators, participating projects, and people with lived experience who are currently engaged with the Coordinated Entry System or have been referred to housing through the coordinated entry process in the past year; said interviews and/or focus groups should include a focus on understanding how different populations (veterans, households fleeing domestic violence, people experiencing chronic homelessness, and youth)

experience and are served by the Coordinated Entry System and how different project types (street outreach, access sites, emergency shelter, transitional housing, rapid re-housing, and permanent supportive housing) experience the system

- Call center or intake data
- Screening and/or assessment tools and results
- Policies and procedures and other governance documents
- Observation of the assessment process by reviewing redacted transcripts if available, using a “secret shopper” approach, or other means proposed by the Applicant
- Cost and resource data
- HMIS data, and/or data from other CE management systems, including existing CoC reports and analyses, such as the annual gaps analysis, Coordinated Entry System Reports, System Performance Measures and Longitudinal Systems Analysis data, and Racial Disparities Assessment.

**It is anticipated that the tasks to be performed would likely include the following, but the Applicant should delineate whatever activities they believe would result in a thorough evaluation of the Eastern PA CoC’s Coordinated Entry system within the proposed budget.**

- Collection of information on the Coordinated Entry system and the CoC’s homeless crisis response system as a whole, including all Coordinated Entry and CoC system data available; and soliciting input and feedback from CoC stakeholders, including CoC leadership; participating projects; Coordinated Entry leadership, operators, and providers (both management and front line staff); and participants (households, including unaccompanied children and youth, experiencing homelessness who are currently engaged with the Coordinated Entry System or have been referred to housing through the coordinated entry process in the past year) with a focus on evaluating the following:
  - participant experience of the coordinated entry system, such as: ease of locating access points, efficiency of intake and assessment processes, and effectiveness of referrals / rate of acceptance or denial of direct CE referrals by providers and/or participants
  - analysis of the housing and service needs of families and individuals who are homeless or at risk of homelessness in order to make recommendations on process changes or refinements to result in a more effective homeless crisis response system; this may include identification of gaps in the process/ system which create barriers to housing stability for families and individuals, including gaps in specific housing and/or service intervention types (some of this is captured in the CoC’s annual gaps analysis)
    - the CoC recognizes that to a certain extent, effectiveness of CE referrals is driven by system capacity; the CoC welcomes recommendations regarding the types of interventions and number of new units the CoC needs to invest in to improve system effectiveness
  - frequency of participant attempts to access system, effectiveness of call center or intake process, such as call volume, hold times, dropped calls, call length,

length to appointment time (some of this is captured in the Coordinated Entry System and PA211 call center reports), and referral results/ the rate of acceptance or denial of direct CE referrals

- compliance with applicable HUD Coordinated Entry Notices, CoC Program Interim Rule, ESG Interim Rule, and HUD Equal Access Rule, etc.; provide recommendations on policies and procedures to ensure full compliance with all relevant requirements
- consistently following CoC's written Coordinated Entry policies and procedures and standards for providing CoC and ESG assistance regarding participant eligibility and prioritization of eligible participants for assistance
- reach of system participation and the quality of collaboration, including considerations for expanding access to hard to reach populations, including those who are unsheltered / staying in places not meant for habitation
- the Access Point process and the homeless system's overall accessibility, including assessment of the cost and resources data to determine cost effectiveness of the system, making recommendations regarding the CoC's investment of resources into PA211 call centers, physical access point sites in the community, street outreach as mobile access sites, etc.
- the CoC's assessment tool, considering recommendations from staff currently completing assessments and people with lived experience; determine if assessment is being delivered with fidelity to policies and procedures and assessment process trainings, is being administered consistently across access points and subpopulations (this data collection option may not always be appropriate or viable), and is accurately capturing participant's needs; recommend any necessary changes or refinements to the tool or adoption of a different tool
- the assessment process, considering recommendations from staff currently completing assessments and people with lived experience; recommend any changes or refinements to the assessment process to ensure the process is comprehensive, effective, and timely; participants' needs and preferences are accurately documented through the assessment process; and effectiveness of current diversion efforts, identifying opportunities to incorporate more triage and diversion strategies
- comparing assessment data across demographics, prioritization determination, and housing and service needs to other community data sources (e.g., HMIS, PIT Count, census data) to ensure assessed populations are consistent with larger service population (some of this is captured in CoC's racial disparities analysis and annual gaps analysis)
- referral procedures to determine how they are functioning and their appropriateness; recommend changes to the process, including the HMIS portion of the process, if needed
- the effectiveness and efficiency of the current prioritization and referral process and procedures in connecting households to and with CoC resources that prevent or end their homelessness, including understanding how many literally

- homeless households access permanent housing as a result of a CE referral, and how many diversion attempts are successful; the time between assessment and referral, referral and housing, and total time between assessment and housing; and the role the Coordinated Entry Regional Managers play in the prioritization and referral process
  - technical aspects of the Coordinated Entry system that can be improved (for Coordinated Entry leadership, operators, and providers)
- Preparing and presenting to the full CoC a final report to include the Applicant’s critical evaluation observations and recommendations related to improving the effectiveness and efficiency of the Eastern PA CoC’s Coordinated Entry System, including recommendations for how to incorporate diversion strategies into the system; ensuring compliance with HUD’s Coordinated Entry requirements, including recommendations for the CoC’s Written policies and procedures describing the frequency and method by which the Coordinated Entry evaluation will be conducted and how the evaluation will be used to implement updates to existing policies and procedures and recommendations regarding changes to the community’s inventory of specific housing and/or service intervention types that will improve the Coordinated Entry system’s ability to move people out of homelessness to housing are welcome.

**Proposal Preparation and Submission**

These instructions outline the guidelines governing the format and content of the proposal. Only that information which is essential to an understanding and evaluation of the proposal should be submitted. No limitation on the content of the proposal is intended in these instructions and inclusion of any pertinent data or information is permitted within the page requirements. The Eastern PA CoC will penalize applications up to five (5) points for submissions that do not follow formatting requirements in this section. The Eastern PA CoC will not consider submissions submitted after the due date.

- **Proposal Format**
  - Proposals must be computer-generated or typed using 12-point font with 1-inch margins.
  - Page numbers must be included on each page of the proposal.
  - The proposal must have a table of contents that corresponds to the sections and appendices.
  - All documents must be submitted as one (1) PDF.
  - The proposals must be executed by a duly authorized officer or agent of the Applicant.
- **Proposal Content Requirements**
  - Table of Contents
  - Executive Summary
    - The Executive Summary provides the context in which the CoC Board assesses the applicant’s qualifications and proposal. The Executive



Summary shall not exceed one (1) page. The Executive Summary must concisely identify the organizations and individuals who are a part of the proposal. This section must summarize the methods the Applicant and Proposal partners, if any, would employ to complete the project's scope of work by Monday, February 28, 2022.

- **Organizational and Key Personnel Information** - The Organizational Information section provides the basic information about the Applicant and proposal partner, if any. This section must not exceed four (4) pages and must include the following:
  - Identify the Applicant and include the business's complete name, address, including headquarters and all local offices, and telephone numbers. The name, mailing address, and telephone number of the duly authorized officer or agent of the Applicant and the person the Eastern PA CoC should contact regarding the proposal.
  - If applicable, identify other individuals or businesses, or "Proposal Partners", that played a role in developing the proposal. For these individuals and businesses, provide their complete name, address, including headquarters and all local offices, and telephone numbers, as well as the name, mailing address, and telephone number of the person(s) the Eastern PA CoC should contact regarding the proposal.
  - Describe the organization, including names of principals, number of employees, longevity, client base, areas of specialization, and expertise for the Applicant and Proposal Applicant Partners, if applicable.
  - A complete disclosure if the Applicant or Proposal Partners have defaulted in their performance on a contract during the past five years which has led the other party to terminate the agreement, and if so, the identity of the parties involved and the circumstances of the default or the termination for the Applicant and Proposal Partners, if applicable.
  - Identify the key personnel at the Applicant and Proposal Partners, if applicable, who would work on this project, including their names, qualifications, and experience. Attach resumes of key project staff.
    - Resumes will not be counted toward the narrative page limit.
- **Proposal Narrative** - The Proposal Narrative must not exceed six (6) pages and must include the following:
  - A description of experience of the Applicant and Proposal Partners, if applicable, in working with Balance of State Continua of Care;
  - A description of experience of the Applicant and Proposal Partners, after January 2017, if applicable, in evaluating a Coordinated Entry System, particularly one established by a Balance of State Continuum of Care, including information relating to the outcomes or success of the work

- A description of the competence of the Applicant and Proposal Partners, if applicable, working with and interviewing people with lived experience of homelessness or similar populations;
  - A description of the experience of the Applicant and Proposal Partners, if applicable, in data analysis, including experience with Homeless Management Information System (HMIS) or databases similar to HMIS; and
  - A description of the methods the Applicant and Proposal Partners, if applicable, would use to implement the scope of work. Please include a timeline with the project ending no later than Monday, February 28, 2022.
- **Workplan**
  - A detailed work plan outlining the Applicant’s scope of services. Work plan should include a description of process to be used, deliverables, timeframes for each element in the scope of services, and which key personnel will be assigned to each deliverable and element. The timeline should indicate the length of time suggested for each activity and its beginning and ending point within the contract period.
- **Budget**
  - The Budget specifies the applicant’s funding request and details how and when the applicant would use the funding. The budget should be itemized, with the quantity and description for each requested cost included.
- **References**
  - Two (2) professional references/ a list of two clients (Name, Title, Organization, Address, Email Address, and Phone Number for each reference) for whom similar work has been prepared in the past five years, including a brief summary (not to exceed one page for each client) of the work completed and how it relates to the scope of services included in this RFP
  - Two (2) Coordinated Entry evaluations created by the Applicant or Proposal Partners, if applicable

**Selection Criteria**

- Organizational and Key Personnel Information – 7 Points
  - Demonstrated expertise and experience of the organization and the key personnel assigned to the project to deliver the scope of services
  - The Applicant and Proposal Partners have not defaulted in their performance on a contract in the past five years.
- Proposal Narrative and Resumes/ CVs of Key Personnel assigned – 15 Points

- Proposal Narrative - Demonstrated ability to fully meet the objectives of this RFP, including expertise and experience of the applicant and the personnel assigned working with BoS CoCs and people with lived experience of homelessness or similar populations, conducting Coordinated Entry Evaluations, conducting data analysis and working with HMIS or similar databases, and methods used to meet the objectives of this RFP
- Workplan – 10 Points
  - Demonstrated ability to complete the Scope of Service and Tasks within the timeline proposed and the timeline is reasonable and feasible; proposed work plan includes detailed timeline/ schedule of tasks, desired outcomes, and strategy for accomplishing scope of work; if applicable, demonstrated ability to complete the Scope or Services/ meet of the objectives of the RFP using alternative strategies or a shorter timeline than what is described in the RFP
- Budget – 8 Points
  - cost details/ narratives for each task, number of hours required for each task and overall project, and hourly rate
- References/ Sample Evaluations – 10 Points
  - Demonstrated expertise and experience of the personnel assigned to the contract to carry out the Coordinated Entry evaluation
- Interview (if any)

## Appendix – Small and/or Diverse Business Firm Disclosure Form

### About

The Eastern PA CoC is committed to taking affirmative steps to engage with Small Businesses and/or Diverse Businesses, including Minority, Woman, LGBTQ, and Disability-Owned Business, when possible.

### Instructions

Complete these forms, as applicable, and submit them with your proposal. Incomplete or unsigned forms will be invalid.

**Name of Firm:** Click or tap here to enter text.

**Date of Incorporation:** Click or tap here to enter text.

**State of Incorporation:** Click or tap here to enter text.

**Owner's Name:** Click or tap here to enter text.

**Business Address:** Click or tap here to enter text.

**Telephone:** Click or tap here to enter text.      **Fax:** Click or tap here to enter text.

**Email Address:** Click or tap here to enter text.

**Type of Business:** Click or tap here to enter text.

**Owner Signature:** Click or tap here to enter text.

## Minority, Woman, LGBTQ, and Disability-Owned Business Enterprises Eligibility Criteria

To qualify as a Minority, Woman, LGBTQ, and Disability-Owned Business, at least 51 percent of the business must be owned by members of a “minority group,” which includes people who identify as Women, African Americans, Indigenous Americans, Asian Americans, Latinx, LGBTQ, and/or having a disabling condition.

We qualify as a “Minority, Woman, LGBTQ, and Disability-Owned Business” as per the above definition and declaration:

- Yes
- No

The percent ownership of this business entity is as follows:

Group	Percent Ownership
Women	Click or tap here to enter text.
African Americans	Click or tap here to enter text.
Indigenous Americans	Click or tap here to enter text.
Asian Americans	Click or tap here to enter text.
Latinx	Click or tap here to enter text.
LGBTQ	Click or tap here to enter text.
People with disabilities	Click or tap here to enter text.

### Small Business Enterprise Eligibility Criteria

To qualify as a Small Business, a business must meet each of the following requirements:

- be a for-profit, United States business;
- be independently owned;
- may not be dominant in its field of operation;
- may not employ more than 100 full-time equivalent employees; and
- may not exceed three-year average gross revenues of \$38.5 Million, regardless of business type

We qualify as a Small Business as per the above definition and declaration:

- Yes
- No

Our business structure is:

- Sole proprietor
- Partnership
- Limited Liability Company
- Corporation
- Other: [Click or tap here to enter text.](#)

This form must be returned with a copy of the partnership agreement, articles of the organization, or articles of incorporation.