HMIS Transition

Bitfocus

We're here to make the HMIS transition as easy as possible. So how about a simple checklist to keep track of the process?

Keep in mind that the order of the steps presented may not necessarily be the same for each CoC. Be sure to shape the resources to meet your unique needs.

☐ Building a Vendor Selection Committee
- ☐ Outline responsibilities for each committee role (Project Manager, HMIS Lead, Etc.)
- ☐ Assign each role

☐ CoC Assessment of Software in Place
- ☐ Identify features that work well for you
- ☐ Identity desired or missing features

☐ Develop Vendor Requirements
- ☐ Outline common workflows
- ☐ Create master list of HUB and custom data requirements
- ☐ Create requirement database to document this list
- ☐ Consult other CoCs

☐ RFP Document Development
- ☐ Research the marketplace
- ☐ Develop firm understanding of RFP process
- ☐ Develop RFP: Define business needs, desired functional requirements, and technical requirements

☐ Evaluation Tool Development
- ☐ Proposal evaluation tool
- ☐ Requirements database evaluation tool
- ☐ References check evaluation tool
- ☐ Demonstration evaluation tool

☐ RFP Release
- ☐ Curate list of vendors to notify
- ☐ Craft emails alerting vendors and outlining HMIS procurement process for them
- ☐ Send official documents to Vendors and post on online
- ☐ Identify resources needed for HMIS transition

☐ RFP Review (Phase I Review)
- ☐ **First Cut:** Preliminary evaluation
- ☐ **Second Cut:** Scoring rubric
- ☐ **Final Cut:** Reference check
- ☐ Calculate scores
- ☐ Create shortlist of desired vendors

☐ Vendor Demonstrations (Phase II Review)
- ☐ Send out demonstration invitation emails
- ☐ Evaluate demonstrations with assessment tools
- ☐ Collect evaluations

☐ Vendor Selection
- ☐ Calculate vendor scores
- ☐ Present recommendation to selection committee
- ☐ Notify participating vendors of final decision
- ☐ Communicate decision to community

☐ Contracting
- ☐ Get access to legal advice
- ☐ Set contract components
- ☐ Establish service level agreement (SLA)