Imperial Valley
Housing Authority

Kirk Mann
Executive Director

1402 “D” Street ● Brawley, CA 92227

FAX (760) 344-9712

REQUEST FOR PROPOSALS

ISSUED BY: Imperial Valley Housing Authority
ADDRESS: 1402 “D” Street / Brawley, CA 92227

ISSUE DATE: June 30, 2023

TITLE: **Application Software**

Sealed proposals will be received until 4 p.m. local time, Monday, August 7, 2023, for furnishing the services described herein. Facsimile proposals will not be accepted. Proposals received after the date and hour designated are non-responsive, automatically disqualified, and will not be considered.

Proposals shall be in a sealed envelope and identified with the following information:

RFP: APPLICATION SOFTWARE 2023

It is the Authority’s objective to integrate all property management and financial functions into the new system, thereby minimizing the existence of duplicate systems and eliminating most or all stand-alone systems and databases. The system needs to support the needs of the entire enterprise and provide data to support decision-making. Software vendors that are unable to provide an integrated system that meets most of the needs identified in the RFP need not submit a proposal.

Waiver of Irregularity: The Housing Authority reserves the right to waive any or all irregularities and may reject any or all proposals.

Firms/agencies not meeting the selection criteria will be considered non-responsive. All proposals are to be submitted with one (1) original hard copy with original signatures of an owner or officer of the firm and a completed PDF Document on compact disc (cd).

All inquiries regarding the Request for Proposals should be directed to Alex Celis, Procurement Officer at: (760) 351-7000, ext. 121 or acelis@ivha.org.

Kirk Mann
Executive Director

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I. Introduction

A. Introduction & Purpose of RFP

The Imperial Valley Housing Authority ('the Housing Authority') is a Public Housing Agency (PHA), comprised of the following entities, associated properties, and programs:

- Imperial Valley Housing Authority
  - Low rent public housing located in multiple buildings on multiple sites – 511 units
  - Housing Choice Vouchers –1686 vouchers
  - Mainstream vouchers – 154 vouchers
  - Emergency Housing Vouchers – 156
  - VASH vouchers - 10
  - USDA-RD Farm Labor - 182 Units
  - HUD Section 202 – 60 units
  - State RHCP Units – 106 (56 of which have Low-Income Housing Tax Credits)
  - HUD Multi-Family – 105 Units
  - Market Rate – 36 Units
  - CDBG Mobile Home Spaces – 98 Spaces
  - Family Self-Sufficiency
  - Homeownership

It is IVHA objective to integrate all property management and financial functions into a new system, thereby minimizing the existence of duplicate systems and eliminating most or all of the stand-alone systems and databases. The system needs to support the needs of the entire enterprise and provide data to support decision-making.

B. RFP Terms & Condition

All proposals shall remain valid for a period of one hundred twenty (120) calendar days after the date specified for receipt of proposals. All cost of the proposal process, interviews, contract negotiation, and related expenses, are solely the responsibility of the vendors.

IVHA reserves the right to cancel this RFP or to reject any informalities, and all proposals received which include, but are not limited to, noncompliance with the RFP and stated requirements.

C. RFP Scope

General: The vendor is to provide a proposal for software that will manage the following application areas:

1. **Financial Applications:**
   - General Ledger
   - Budget Preparation and Forecasting
   - Budget Control
   - Accounts Payable

- Accounts Receivable
- Tenant Billing
- Financial Report
- Fixed Assets
- Cash Management
- Grant Management
- Purchasing
- Inventory with bar coding capabilities, Requisition
- Contract Management

2. **Housing Applications:**

    - Client Management & Services (Applications, Waiting List, Certifications, Resident Services)
    - Property Management (leases, unit management, billing, inspection, and maintenance)
    - Housing and Property Inspections
    - HUD & USDA Program Reporting and Compliance
    - Payroll and Human Resources
    - Web-based self service
    - Tax Credit Compliance
    - Creation & Submission of 50058/50059 form
    - Rent Calculation
    - UPC Inspections
    - HQS Inspections
    - Voucher Management System (VMS) Report

3. **Other Desired Features:**

    - Capabilities for integration with online banking applications and facilitate direct deposit of housing assistance payments.
    - Mobile application for inspection and work orders and devices supported
    - Online housing application for applicants.
    - Online Landlord access to account information.
    - Follow best practices for cyber security, backing up data and business recovery policies.
    - Optional off site/cloud location and maintenance of software associated hardware and equipment.

    Vendor will use the checkoff list on page 12.

4. **Data Conversion:** Proposals must include a detailed data conversion plan for IVHA current data from the existing system to installation, and successful implementation and testing of the software and hardware in IVHA computer network. Data conversion to include conversion of historical data.

    IVHA will require proposer to provide a detail listing of what duties and tasks IVHA and its staff will be required to perform regarding the data conversion process including but not limited to data conversion, data history and software implementation, among others.

5. **Training:** training of IVHA staff to include end-user, intermediate and technical level training sufficient for the IVHA to operate independently.

6. **Technical Support:** Ongoing technical support and software updates to maintain compliance with Federal directives, and to provide for bug fixes and product enhancements.

7. **Demonstration:** A product demonstration is not a requirement of the RFP; however, IVHA may request a demonstration from vendor(s) and if so, the demonstration shall be provided.

    Each proposal must include a full description of the proposer's software standard maintenance and support agreements including annual costs to IVHA for these services**.** These maintenance agreements must provide for periodic updates to the software for product enhancements, bug fixes, tax and regulatory compliance, etc. Each proposal must fully document the Respondent's upgrade policy including any costs for upgrades outside the standard maintenance contract. Also, include a description of services to provide individual modifications and add-ons requested by IVHA that would be unique and serve a special need of our organization.

When describing telephone support, proposals must specify all conditions (Including availability time and escalation processes) for its use by both end-user and technical staff.

D. System Installation and Support

The Respondent shall be responsible for installation and testing of the system to the point of independent operation by the IVHA personnel. In addition, the Respondent, as part of the proposal, shall provide support services necessary to ensure successful operation of the system including, but not limited to, the following:

- Acceptance testing after installation
- Maintenance support for bug fixes, enhancements and tax and regulatory compliance updates
- End user, intermediate user, and staff training

The respondent must also have to support the system after installation is completed and accepted by IVHA. The support must take the form of on-going programming and management support to accommodate regulatory changes and for immediate resolution of user problems. Furthermore, the on-going programming support must have the capability of using Internet communications for on-line problem solving and analysis.

E. Current Operating Environment (Systems)

1) Housing Program

- Tenmast Application hosted by Tenmast through Cintrix.
- All application, tenant information is stored on Tenmast Servers.
- Printing is done through TS Print.

2) IVHA Hardware & Communications

- Domain: Windows 2019 Server
- Remote: Windows Server 2019
- 38 fully network workstations with Window 10 pro
- Spectrum Business Internet
- 3 Remote Sites, Login through VPN
- 25+ network printers (Canon, Okidata, Lexmark, HP)
- Static IP addresses \ LAN

2) Software

- PHA software –
    - Tenmast – Housing and Section 8
    - ProvideX – PVX (Maintenance, Inventory, and Purchasing).
    - Real Page & Tenmast for the tax credit program.
- Microsoft 365 – Word, Excel, Outlook.
- Payroll software

Vendors whose response must provide support services necessary for the application software to operate with the current IVHA infrastructure to ensure successful conversion and operation.

F. RFP Schedule of Activities

The following schedule outlines the approximate time frame of the activities that will be followed to assist in the selection of the vendor. The schedule, except for the deadline for receiving proposals, is subject to change. The Housing Authority may also deem some of the activities to be unnecessary and may choose not to conduct some or all of the activities listed below:

Issue RFP date	June 30, 2023
Last day for clarification/questions	July 27, 2023
Proposal due date	August 7, 2023
Evaluation/demo period	August 8 – September 8, 2023
Final selection (Estimated)	September 14, 2023
Implementation Commencement	TBD

II. Proposal Conditions

A. Proposal Due Date and Addressee

Respondents must submit one (1) original hard copy proposal and a completed PDF Document on compact disk (CD) to:

Imperial Valley Housing Authority, 1402 'D' Street, Brawley, CA 92227

Please mark submission "RFP: APPLICATION SOFTWARE 2023"

Proposals must be received by **August 7, 2023, 4:00 p.m. local time.** All proposals that are not received by the deadline will be considered late and will be returned to the proposer unopened. Elaborate, bound proposals are not desired. Submissions received by fax will not be accepted.

B. Contacts

Please direct all inquiries for additional information regarding the request for proposal to the following individuals. All inquiries must be by e-mail.

Staff	Email:
Alex Celis, Purchasing / IT	acelis@ivha.org
Phillip Grant, Contract Admin.	pgrant@ivha.org

The deadline for submitting such questions is **July 27, 2023**. If, in the Authority's opinion, additional information or interpretation is necessary, such information will be supplied in the form of an Addenda that will be mailed to all individuals, firms, etc., having received this Request for Proposal, and such Addenda shall have the same binding effect as though contained in the main body of the Request for Proposal. Oral instructions or information concerning the specifications of the project given out by the Housing Authority, its managers, employees, or agents to prospective proposers shall not bind the Housing Authority. All Addenda shall be issued by e-mail not fewer than four (4) calendar days prior to the proposal deadline.

Please direct any questions regarding additional clarification on the proposal requirements to Alex Celis and Phillip Grant who will be responsible for ensuring that your requests are addressed in a timely manner. Questions posed by you, and our responses, may be distributed to all responding vendors.

C. Proposal Format

All proposals should follow the format provided. Responses will be reviewed for completeness prior to detailed evaluation. A response submitted in a manner that makes evaluation unnecessarily time-consuming may be eliminated from further consideration. We require the proposal in both hardcopy and CD format. Elaborate, bound proposals are not desired. We are more interested in proposal quality, brevity, and clarity.

- An individual authorized to bind the vendor(s) contractually must sign the vendor's Transmittal Letter.

- The vendor must specify how long product and service pricing will be valid (a minimum of 120 days will be required).

- The vendor response should include the following information in the order indicated:
  1. **Introduction -** Provide a brief, non-technical overview of the vendor's business, including the range of products and services offered by the vendor.
  2. **Vendor Information -** Response to questions concerning vendor credentials as specified in Section III.
  3. **General and Technical Requirements -** Response to report writer, system software, hardware specifications, and other technical questions, as specified in Section IV.
  4. **Application Requirements -** Responses to application requirements, as specified in Section V.
  5. **Customer Service and Support -** Responses to education, implementation, maintenance, documentation, and other customer service/support questions, as specified in Section VI.
  6. **Cost -** Detail and summary of fees and costs, as specified in Section VII.
  7. **Required HUD Form –** HUD-5369-C Certifications and Representations of Offerors – Included at IX. Appendix D.
  8. **Required Section 3 Certification –** Included at IX Appendix C.
  9. **References -** Vendor is required to submit a minimum of three (3) customer references, as specified in Section VIII.
  10. **Warranty –** Vendor must include all initial guarantees & warranties.
  11. **Appendix -** Product information, such as, brochures, demo disk, course catalogs, and other material that contributes value to the response document.

D. Evaluation Criteria

The following are the criteria that will be used in evaluating the submitted proposals. They are listed in order of importance. As some vendor's software functionality may not be applicable to the full scope of the RFP, please note that evaluations will be performed on a module-by-module basis, as defined in the functional requirements.

Criteria	Points Available
Degree to which the package fits functional requirements (on a modular basis) listed in the RFP without requiring modification	15
System adaptability to change and expand, including timeliness of changes	15
Implementation services, including application training, conversion assistance, timing, etc.	15
Support services, including maintenance, new releases, hot lines, and responsiveness	15
Vendor qualifications and financial stability	10
Total three (3) year cost of ownership / Terms of Sale	15
Customer references	10
Section 3 Compliance Strategy*	5
Total Points	**100**

*See documents contained in IX Attachment C for the HUD Section 3 requirements, preference for Section 3 businesses, evaluation instructions and documentation requirements. Applicants who meet the Section 3 Business categories must indicate the category under which they are qualified and must provide documentation that supports the claimed qualification

E. Terms and Conditions II

The following are terms and conditions to which the vendor must adhere:

1. The vendor must keep information both published and unpublished confidential and not disclose such information or make it available to third parties.
2. An officer of the business capable of binding the offer must sign proposals.
3. The Housing Authority reserves the right to reject any or all responses to this RFP.
4. Proposer must comply with all applicable requirements of federal and State Civil Rights Law and Rehabilitation Statutes.
5. The Housing Authority strongly encourages the participation of minority, women, and small businesses in this and in all Housing Authority projects, programs, and services.
6. Costs incurred by the vendor in preparing or submitting a proposal will be the responsibility of the respondent and will not be reimbursed by the Housing Authority.
7. In case of any doubt or differences of opinions regarding the items or services to be furnished hereunder, or the interpretation of the provisions of the RFP, the decision of the Housing Authority shall be final and binding upon all parties.
8. Neither the resultant contract, nor any of the requirements, rights, or privileges demanded by it, may be sold, assigned, contracted, or transferred by the Contractor without the express written consent of the Housing Authority.
9. A Proposer, submitting a Proposal hereby certifies that no officer, agent, or employee of the Housing Authority has a pecuniary interest in this Proposal; that the Proposal is made in good faith without fraud, collusion, or connection of any kind with any other Proposer; the Proposer is competing solely in its own behalf without connection with, or obligation to, any undisclosed person or firm.
10. Any publicity giving reference to this project, whether in the form of press releases, brochures, photographic coverage, or verbal announcement, shall be only with the general or specific approval of the Housing Authority.

F. Appeals

Proposers may appeal only deviations from laws, rules, regulations, or procedures. Disagreement with the process, e.g., scoring by evaluators, is <u>not</u> appealable. The following procedure applies to applicants who wish to appeal a disqualification of proposal or award of contract:

1. Applicants shall submit Appeal, in writing, to the Executive Director. Appeals must be received by the Executive Director no later than 4 p.m. on the fifth (5th) <u>working</u> day after the postmarked Notice of Award or disqualification.
2. Address Appeal to:

   Imperial Valley Housing Authority
   Attn: Kirk Mann
   1402 ‘D’ Street
   Brawley, CA 92227

   Appeal must specify the grounds for the Appeal, including the specific citation of law, rule, regulation, or procedure upon which the protest is based. The judgment used in scoring by individual evaluators is not grounds for appeal.

3. Appeals not filed within the time specified in paragraph 1, above, or which fail to cite the specific law, rule, regulation, or procedure upon which the appeal is based shall be dismissed.

III. Vendor Information

1. Identify the individual(s) in your organization who will be our contact(s) throughout the evaluation process. Please include name, title, mailing address, e-mail address, and both voice and fax phone numbers.
2. What is your primary business? Provide a short history of your business, including when it was founded, any major milestone events, and a product list.
3. Discuss the factors that differentiate your system from systems offered by other vendors.
4. How many employees does your business have in each functional area (sales, customer support, implementation, R&D, etc.)?
5. Did you design and develop the proposed software, or are you marketing the proposed system for another vendor or third party? If marketing, who designed the system and who will provide on-going support?
6. How many customers do you have in total? How many in California?
7. Please specify the range of seats installed at your client base. What is your average number of seats?
8. How many customers do you have in the Property Management area? In the Housing Authority area? In the LIHTC property management area? In the USDA-RD property management area?
9. What is the <u>average</u> portfolio size of your Property Management/Housing Authority customers?
10. *Housing Authority customers only*: What is the average number of public housing units, Section 8 vouchers, and the corresponding range for your customer base?
11. Who is your largest customer?
12. When was the proposed software system first installed?
13. List the North American and international locations where you have offices. Designate functions at each office (e.g., sales, support, service, etc.).
14. Do you intend to subcontract any part of the work for the proposed system? If yes, specify the percentage of the total contract to be subcontracted and identify the subcontractor organization(s). We reserve the right to approve all subcontractor participants and will expect you to perform as the primary contractor, responsible for all subcontractor activities. Additionally, we expect you to serve as the primary contact for all issues regarding implementation of the solution. Do you agree to these terms? If no, please discuss differences.
15. Please provide a financial statement covering the last two years. Publicly held companies should also provide their most recent Annual Report.
16. How do you stay current on HUD mandated changes to software systems?

IV. General and Technical Requirements

A. General

1. Does your company provide hosting and data backup?
2. Does your system contain or interface with any E-mail systems (please list)? If so, how are they linked to your product?
3. Is it possible to open multiple screens at the same time?
4. Is your system flexible where users could adjust the font to meet users needs?
5. Does the system have import/export capabilities? If so, please explain.
6. Does the system provide flexibility throughout to route inquiry requests directly to the screen, printer, fax, e-mail, file, etc.?
7. Does the system provide for any connectivity/access to the Internet? If so, please describe. Also provide details on how the system is safeguarded from any potential problems from the Internet.
8. Does the system provide complete "Drill-Down" capability on-screen (summary level to transaction level) in all areas of the application?
9. Do interfaces exist to allow for HR/Payroll accounting transactions (from a third-party vendor) to be passed into the accounting system (e.g., employee time & expense reporting, accrued vacation & sick time)? If yes, please describe existing interfaces.
10. Does your system currently contain established links to any HUD and/or USDA-MINC reporting packages? Please list:
11. Does your system support EDI (Electronic Data Interchange)? If so, please describe.
12. Are any third-party software packages suggested and/or required with this solution (e.g., human resources, leasing, EDI, etc.)? If so, please list and describe.
13. Who supports required third party software packages?
14. Do you support OLE and DDE, which allow for the edit, import, and export capability of data to other commercially available packages, such as, Microsoft Excel and Word?
15. Does your system support ODBC?
16. If yes to #15, do ODBC drivers come with the system? If not, what is the cost?
17. Does the system support on-line data entry, inquiry, and update in a global sense?
18. Does your system provide context sensitive on-line help (technical and end-user)?
19. Do you provide source code? If yes, is there a fee involved?
20. Please describe system flexibility in adding user-defined fields.
21. State your future technology direction for your software over the next three to five years.
22. Does your company have application portal, resident portal, and landlord portal available to help expand our agency?

B. Hardware/Network

Provide technical specifications on the preferred hardware configuration, including all components (e.g., CPU, disk, memory, workstation, peripherals, etc.) to run your application.

C. System Software

1. Provide information on the recommended operating system.
2. Describe other operating systems/environments that your system supports. Please provide any performance benchmarks.
3. Does the same functionality exist across all supported platforms?
4. Provide information regarding the recommended programming language and relational database management system. Please indicate if the purchase of the database is outside the scope of your proposal.
5. Describe other database management systems that your system supports.

D. Reporting Requirements

1. Describe the ad hoc reporting capabilities of your system.
2. Are your files accessible to commercially available report writers? If so, please list these report writers.
3. Are these report writers required or do you provide a proprietary report writer?
4. Can standard users develop reports easily with your report writer, or will they require assistance from systems personnel or a "power user"?
5. Does your report writer have the capability to export reports to spreadsheets, word processors, or desktop publishing packages? Describe, in detail, how this is accomplished.
6. Describe the HUD and USDA reports provided with the system.
7. Identify the demographic data available through the reporting software.

E. History Maintenance

1. What amount of data (maximum number of years) may be kept on-line (not considering system storage limitations)?
2. Describe how your system maintains and stores historical data.
3. Can users view data for a particular point in time on-line?
4. Is an archive facility provided to purge history to Optical Storage, CD-ROM, or other media? If so, please describe.
5. Does your system provide a facility to restore archived history to production files?
6. Does your system have built-in back-up and restore procedures for production processing?

F. Security

1. How is application security established?
2. Describe the levels of security offered by your system.

3. Can security profiles be established for users or groups of users? How specific are the user profiles?
4. Is a Disaster Recovery Plan for hardware/software issues currently available? If so, please provide information.

V. Application Requirements

A. Applications Overview

The Housing Authority plans to acquire applications for all areas of the business: Voucher Programs, HUD and USDA reporting, Property Management (leases, unit management, billing, inspections, and maintenance), Tax credit management, Resident Services, Collections, Budgeting, General Ledger, Accounts Payable, Accounts Receivable, Payroll, Document Storage, Purchasing, Utility Management, Capital Fund, Wait list management, etc.

B. Instructions for Completion

For each application, a specification check list has been developed. This is not a complete list. For each item in the list, please provide a Yes or No response. Please add comments to make your responses as complete and accurate as possible.

No.	Item	Yes/No	Comments
1	Hosting & Data backup		
2	Active and inactive landlords and AP vendors		
3	Active waiting list(s)		
4	Bank accounts		
5	Check formats		
6	Check registers		
7	Collection loss account with details (24 months of history)		
8	Maintenance work order forms		
9	Inventory, distribution, tracking, reorder		
10	Inventory bar coding capabilities		
11	Fixed maintenance work orders		
12	General ledger (24 months of detailed transactions)		
13	General ledger chart of accounts for each fund		
14	Inactive applicants (24 months of history)		
15	Invoice history (24 months of detailed transactions)		
16	Tenant deposits (24 months of history)		
17	Recurring invoices		
18	Repayment agreements (24 months of history)		

19	Section 8 properties		
20	Security deposit account balance and transaction detail (24 months of history)		
No.	**Item**	**Yes/No**	**Comments**
21	Client/tenant contracts		
22	Client/tenant dependents		
23	Client/tenant expenses		
24	Client/tenant FSS information		
25	Client/tenant income		
26	Client/tenant notes in current system (24 months of history)		
27	Tenant references		
28	Units/buildings/entrances		
29	Vendor information, Section 8 and Accounts Payable		
30	Waiting list preferences and weights		
31	Waiting lists		
32	Landlord Portal		
33	Resident Portal		
34	Application Portal		
35	Integrate document		

Please provide a response using the response codes detailed below. We encourage you to add comments to make your responses as complete and accurate as possible.

RESPONSE CODE	DESCRITPION
Yes	The function or feature is present in the current release and operates as described.
Release	The function or feature is available in an upcoming release; indicate number and date of release.
User	The user can modify the system so that the function or feature works as described.
Minor	The system can be modified through programming effort to function as described. The programming effort is included in estimate of costs and time to implement.
Major	The system can be modified through programming effort to function as described. Please provide an estimate of the programming hours/cost to achieve this result.
No	The function or feature is not available or does not function as described.
Financial Interface	This function is available with a custom interface to an external financial system included in the proposal.
Dependency	This function is dependent on another module that has not been requested by the RFP. Please discuss how to best achieve this functionality.

Other	If your response does not fit any of the above response's codes, please provide an explanation in the comments field.

No.	Category	Requirement	Response Code	Modification Cost	Comments
1	Overall/General	Software modules are arranged in a logical manner according to order of processing.			
2	Overall/General	Data entry fields are arranged in a logical manner for ease of data entry, with pertinent information summarized on initial screen.			
3	Overall/General	All software modules have easy-to-use online help.			
4	Overall/General	Integrated appointment calendar.			
5	Overall/General	Integrated reminder system (with pop-up tickets).			
No.	Category	Requirement	Response Code	Modification Cost	Comments
6	Overall/General	Time/date fields are displayed in a standardized manner_			
7	Overall/General	Initial training of all users by the software vendor.			
8	Overall/General	Tab-based screens with drill-down menu and shortcut icons.			
9	Overall/General	Validation feature that is fully compliant with the current HUD-50058 Technical Reference Guide			
10	Overall/General	Reports on PIC submissions that will help maintain 95% or higher on all submission rates.			
11	Overall/General	Automatically retrieve PIC error reports and store ticket numbers and PIC error reports.			
12	Overall/General	Translate PIC errors into user friendly directions for corrections.			
13	Overall/General	Ability to compare PIC records with system records to identify any records not currently in PIC system that are in our system.			
14	Overall/General	Search for an applicant/tenant account using the unit number, address, lease date, termination date, SSN, tenant name or tenant number.			
15	Overall/General	Unlimited number of notes for tenants to indicate balances owed or previous problems with residents along with flags for intake to spot if tenant was to apply again.			
16	Overall/General	Ability to list the current HUD regulations and the current A&O Policy while entering the income or deductions for a resident.			
17	Overall/General	Tenant reports that can be filtered by project number, caseworker, and user-defined codes.			
18	Overall/General	Provide detailed rent and utility allowance calculations, kept up to date with latest HUD requirements and formulas.			
19	Overall/General	Automatically calculates Earned Income Disallowance.			

20	Overall/General	Tracks full history of Earned Income Disallowance and automatically determines when a certification is required.			
21	Overall/General	Keeps unit history of prior clients for all programs.			
22	Overall/General	Tracks and maintains all data required for PHAS reporting			
23	Overall/General	GAAP compliant account.			
24	Overall/General	Dashboard features for the accounting modules.			
25	Overall/General	Ability to print labels individually for files or in bulk for mass mailing.			
26	Overall/General	Database is ODBC compliant.			
27	Overall/General	Database is SQL compliant.			
28	Overall/General	Provide audit trails tracking user access to system and activity.			
29	Overall/General	Flexible, robust report writer equal to or better than Crystal Reports available in all subsystems. Ability to modify canned reports and design own reports.			
No.	**Category**	**Requirement**	**Response Code**	**Modification Cost**	**Comments**
30	Overall/General	Fully functional dashboard report system that allows customization for various levels of management and drill-down to individual data items.			
31	Overall/General	Database fields can be exported to and imported from MS Office products using OLE standard.			
32	Overall/General	Intelligent/customizable purge routines for all modules.			
33	Overall/General	Ability to print from system to network printer.			
34	Overall/General	Queuing system for reports/printers and ability to check print status.			
35	Overall/General	Ability to set levels of security for users (i.e., not everyone can change Master File of resident, not everyone can do account adjustments).			
36	Overall/General	Provide security (user and group level) by application.			
37	Overall/General	Provide security (user and group level) by menu item/function within application.			
38	Overall/General	Provide security (user and group level) by reports.			
39	Overall/General	Provide security (user and group level) by queries.			
40	Overall/General	Ability to restrict access by individual users, departments, and positions.			
41	Overall/General	Ability for a complete test environment with all modules.			
42	Overall/General	System tracks security-related incidents (e.g., sex offense, trespassing, drug offense) related to PHA properties and tenants.			

No.	Category	Requirement	Response Code	Modification Cost	Comments
43	Overall/General	System allows police reports to be tagged to security incidents.			
44	Overall/General	Ability to scan, view, print, email and/or fax archived documents to field staff prior to applicant moving in.			
45	Overall/General	A fully integrated document imaging system with the ability to archive, view, print, email, and fax documents directly from the system. Paper documents can be scanned. Reports can be directly archived. Items outside the system on a computer can be archived, such as digital pictures and Microsoft Office documents.			
46	Overall/General	System includes capability to attach electronic files such as digital images and electronic documents directly to specific entities (i.e., applicant, landlord, unit, etc.) without using a separate application.			
47	Overall/General	Ability to distribute reports via email.			
48	General Ledger	Inter-fund balancing—software must automatically set up inter-fund accounts receivable and accounts payable between funds.			
49	General Ledger	Project-based accounting—software must comply with HUD's project-based accounting format and be able to post at the project level as well as multiple-fund level- This posting also applies to budgeting and producing balance sheets and income statements. Produce project-based financials for both the balance sheet and income statement.			
50	General Ledger	Ability to block/control transaction posting to prior periods so no posting is done to the wrong period.			
51	General Ledger	Module posting—The posting to the general ledger must be at the summary level (with the option to post in detail).			
52	General Ledger	Account setup—Multiple segment account numbers should be available as well as the ability to use any combination of segments between funds.			
53	General Ledger	Recurring entries: monthly recurring entries must be available to post manual journal vouchers.			
54	General Ledger	FDS: The Financial Data Schedule for HUD's REAC submission must be made available based on the monthly/annual general ledger processing and postings. Able to pull FDS by Fund/Project.			
55	General Ledger	Monthly postings: Ability to maintain multiple months open at any particular time to process in the future or at year end to process the year-end adjustments. Manage multiple year ends.			
56	General Ledger	Accommodate minimum of 4 account number segments.			
57	General Ledger	Ability to support multiple fiscal calendars.			

58	General Ledger	User-defined inter-fund account numbers.			
59	General Ledger	Automatic creation of inter-fund transactions with complete balancing.			
60	General Ledger	Ability to drill down to detailed information from the GL system to all interfacing subsystems.			
61	General Ledger	Ability to view transaction source and origin in allocated account.			
62	General Ledger	Ability to support unit allocation table (number of contracts per fund automatically determines allocation percentage).			
63	General Ledger	Capability to process subsequent year transactions before completely closing previous year.			
64	General Ledger	Capability to deactivate accounts from further posting without deletion.			
65	General Ledger	Capability to tie GL number to FDS number and facilitate transmission to REAC.			
66	General Ledger	Project-based: The software should allow for input and posting of multiple budgets within a specific fund for project-based budgeting.			
67	General Ledger	Monthly reporting: Reporting should be available for any reporting period even if the month is closed: reports should be capable of combining two or more projects within a fund.			

No.	Category	Requirement	Response Code	Modification Cost	Comments
68	General Ledger	Dashboard feature showing summary totals as well as detail total should be available to non-finance department staff. Feature should be restricted to "read only," with access only after security set up.			
69	General Ledger	Financial reporting: After monthly postings, a feature allows the user to email statements to other users.			
70	General Ledger	Ability to export and import data for the budget.			
71	General Ledger	Able to spread automatically over 12 months.			
72	General Ledger	Ability to enter annual approved budget amounts for each department, cost center or fund.			
73	General Ledger	Ability to track all actuals against approved budget amount by division, project, or fund.			
74	General Ledger	Capability to automatically allocate portions or percentages of budgets between accounts.			
75	Accounts Payable	Record each vendor record with the following basic criteria: vendor name, attention line, address, phone number, fax number, TIN, 1099 Yes or No, MBE, Section 3 vendor, vendor terms.			
76	Accounts Payable	Automatically warn user if a duplicate entity number is entered (Social Security, Federal Tax Identification) from any module within the software program.			
77	Accounts Payable	Organize vendor database by both vendor name and unique vendor number.			
78	Accounts Payable	Include list of individual invoices in each vendor's record.			
79	Accounts Payable	Vendor records split between outstanding and history invoices.			
80	Accounts Payable	Invoice number query by vendor.			
81	Accounts Payable	Each invoice record can have an unlimited number of line items.			

82	Accounts Payable	Real-time and/or batch posting and data entry.			
83	Accounts Payable	Multiple levels of holds for invoices.			
84	Accounts Payable	Automatic warning of duplication of Accounts Payable invoices.			
85	Accounts Payable	Global payment of invoices to be run by due date.			
86	Accounts Payable	Setup features for recurring payments that are amendable.			
87	Accounts Payable	MICR check encoding.			
88	Accounts Payable	Positive Pay bank verification capability.			
89	Accounts Payable	Produce check registers with multiple levels of detail.			
90	Accounts Payable	Automatic check voiding and invoice reinstatement.			
91	Accounts Payable	Unlimited banks and bank accounts with the ability to print checks from any account, creates interfund between funds and projects for A/P entries.			
92	Accounts Payable	ACH payment files to landlords, clients, Housing Authorities, and utility companies with payment email notification.			
93	Accounts Payable	ACH payment files to vendors with payment email notification.			
94	Accounts Payable	ACH pre-note functionality to test the file submission prior to funds transfer.			
95	Accounts Payable	Accounts Payable program integrates with Tenant Accounts Receivable and General Ledger programs so data is entered only once.			
No.	**Category**	**Requirement**	**Response Code**	**Modification Cost**	**Comments**
96	Accounts Payable	Generate separate vendor and landlord audit reports prior to 1099 production.			
97	Accounts Payable	Produce 1099 form for each tax entity (individual or organization).			
98	Accounts Payable	Print 1099 forms and mailers for transmission to the IRS.			
99	Accounts Payable	Ability to print 1099s individually and in bulk.			
100	Accounts Payable	Ability to print Section 8 and Accounts Payable 1099s separately.			
101	Accounts Payable	Archive 1099 history.			
102	Accounts Payable	Process 1099 MISC forms via laser printer.			
103	Accounts Payable	Ability to distribute costs across funds and projects based on agency-defined distribution rules (percentages to each).			
104	Accounts Payable	Integrated electronic filing system (document imaging system) to original invoices, vendor contracts, 1099s, W-9s, etc.			
105	Accounts Payable	Ability to enter manual check into the system.			
106	Tenant Accounting	Automatic posting of payments to residents' accounts.			
107	Tenant Accounting	Maintain security, pet, key and satellite dish deposits.			
108	Tenant Accounting	Ledgers with current and past transactions on all accounts (both active and vacated). Complete audit trail for all activity on tenant accounts.			
109	Tenant Accounting	Customized letters for notifying residents of billing on their accounts (pull information directly from file).			

110	Tenant Accounting	Periodic reporting module to provide audit tracking and review information for both daily and monthly financial data with the ability to set date parameters selection.			
111	Tenant Accounting	Process for month-end reports and printing rent statements.			
112	Tenant Accounting	Online payment processing for several accounts; ability to set maximum payment, ability to not accept payment.			
113	Tenant Accounting	Ability to enter alternate addresses for residents for either evictions or second party processing paperwork.			
114	Tenant Accounting	Ability to enter and bill residents living in units owned by Housing Authority that are not under any HUD program.			
115	Tenant Accounting	Ability to manually enter payments on residents in several accounts if they will not process through the automatic process.			
116	Tenant Accounting	Ability to charge maintenance charges, etc.			
117	Tenant Accounting	Ability to set up repayment agreements for either rent, maintenance or other charges.			
118	Tenant Accounting	Ability to create reoccurring monthly charges and create separate transaction codes for each charge, i.e., pet, congregate services and HAP charges.			
119	Tenant Accounting	Ability to apply late fees to accounts in different programs (different rules for separate programs).			
120	Tenant Accounting	Ability to interface with Accounts Payable for automated Tenant UAP check processing.			
121	Tenant Accounting	Ability to integrate with other software module, i.e., Wait List, General Ledger, Inspection, Maintenance Work Order, Custom or third-party report writer.			
122	Tenant Accounting	Maintains audit trail on resident accounts.			
No.	**Category**	**Requirement**	**Response Code**	**Modification Cost**	**Comments**
123	Tenant Accounting	Prepares customizable delinquent listings and notices.			
124	Tenant Accounting	Automatically posts maintenance charges from the work order program.			
125	Tenant Accounting	When moving in a resident, automatic check to determine whether unit is vacant.			
126	Tenant Accounting	Track lease terminations, court dates and court numbers. Provides summary reports to take to court.			
127	Tenant Accounting	Able to update the utility allowances in the unit records without affecting the resident's rent calculation.			
128	Tenant Accounting	Duplicate existing tenant rent statement.			
129	Tenant Accounting	Tracks tenant late payments.			
130	PH/S8 Inspections	Follows the complete UPCS and HQS inspection protocol.			
131	PH/S8 Inspections	Prints resident notification letters listing family members with ages.			
132	PH/S8 Inspections	Integrates with work order system to generate work orders, if needed for inspections.			
133	PH/S8 Inspections	Tracks and schedules inspection dates.			
134	PH/S8 Inspections	Produces inspection results reports.			
135	PH/S8 Inspections	Integrates with handheld devices for "paperless" inspections recorded directly to data files in the field.			

136	HCV/Section 8	Reports can be maintained on PIC submissions that help to maintain 95% or higher on all submission rates.			
137	HCV/Section 8	Mid-month and month-end check processing can be performed while users are logged in the system.			
138	HCV/Section 8	Automated briefing packages: a complete briefing package is created to include Voucher, Request for Tenancy and HA-specific documents.			
139	HCV/Section 8	Automatically calculates Earned Income Disallowance.			
140	HCV/Section 8	Tracks full history of Earned Income Disallowance and automatically determines when a certification is required.			
141	HCV/Section 8	Does your system offer an online landlord portal?			
142	HCV/Section 8	Online landlord portal: view check history with detailed information?			
143	HCV/Section 8	Online landlord portal: re-print vouchers and 1099s?			
144	HCV/Section 8	Online landlord portal: view property information for their units?			
145	HCV/Section 8	Online landlord portal: view contract information (HAP, TTP, etc.) for each unit?			
146	HCV/Section 8	Online landlord portal: view upcoming inspection schedules?			
147	HCV/Section 8	Online landlord portal: view detailed results of property inspections, including deficiencies?			
148	HCV/Section 8	Online landlord portal: communicate with inspectors?			
149	HCV/Section 8	Online landlord portal: download various forms as defined by GRHC?			
150	HCV/Section 8	Portability, including port-ins and port-outs, and the ability to automatically generate HUD Form 52665 at the click of a button.			
151	HCV/Section 8	Electronic memoranda that document, date and time stamp user notes and "off-line" activities.			
No.	**Category**	**Requirement**	**Response Code**	**Modification Cost**	**Comments**
152	HCV/Section 8	Family language indicator.			
153	HCV/Section 8	Adjustments to HAP and UAP to have more information print on check stub.			
154	HCV/Section 8	Staff has ability to add/change information on approved form letters (merge).			
155	HCV/Section 8	Historical data for units that have been on the program (tenant/landlord history).			
156	HCV/Section 8	Capability to key monthly recurring adjustments, with an area to key information in as to why these adjustments are recurring.			
157	HCV/Section 8	Check processing to be efficient as well as accurate in payments to be disbursed, with reports to back up any and all payments and deductions.			
158	HCV/Section 8	Landlord and owner screens should be one screen, with the ability to key in notes.			
159	HCV/Section 8	Software should alert staff member when they have keyed a previous change in for a tenant as well as alert them if an adjustment is in the system to be paid from that previous charge.			
160	HCV/Section 8	Software should have the capability to invoice a landlord who owes money to GRHC, including portables.			
161	HCV/Section 8	Type 13-50058: Inspection dates must update any pending 50058.			

162	HCV/Section 8	Data validation prior to PIC submission: System verification required to prevent PIC errors to the greatest extent possible.			
163	HCV/Section 8	Automatically update ages of all household members when keying based on effective date of 50058.			
164	HCV/Section 8	Flag any incomplete fields required by PIC and block further processing until complete with valid entries.			
165	HCV/Section 8	Retroactive rent and utility payments: generate calculations automatically based on updated information.			
166	HCV/Section 8	Utilization: Real-time reporting of end-of-month and first-of-month utilization for VMS reporting as required by HUD, including "drill down" feature to reconcile numbers.			
167	HCV/Section 8	SEMAP requirements for annuals and HQS: "hot list" of annual re-exams 120 days prior to annual re-exam date, with a countdown of days remaining until the re-exam date for those not keyed/completed.			
168	HCV/Section 8	SEMAP requirements for annuals and HQS: "hot list" of HQS inspections due. i.e.. 240 days after the last annual inspection date, with a countdown to deadline for completion.			
169	HCV/Section 8	Correct accounting/invoicing adjustments for landlords: flag landlords (EIN) no longer participating in the program, with balances due to automatically deduct any balances when a new unit is put under contract. Include automatic generation of a letter/invoice to the landlord explaining the deduction.			
170	HCV/Section 8	Capability to recoup funds from landlords.			
171	HCV/Section 8	Capable of tracking reasonable accommodations and live-in aides.			
172	HCV/Section 8	Capable of producing VMS data for HUD reporting.			
173	HCV/Section 8	Update prior months VMS data for adjustments/payments made in subsequent months.			
174	HCV/Section 8	HAP charged to correct month for reporting.			
175	HCV/Section 8	Mid-month HAP tracking and reporting.			
No.	**Category**	**Requirement**	**Response Code**	**Modification Cost**	**Comments**
176	HCV/Section 8	Voucher count for end-of-month along with the 1" of the months.			
177	HCV/Section 8	Tracks holds and held HAP payments; allows users to both place and request holds and to release them.			
178	HCV/Section 8	Tracks Section 8 caseloads by staff, allowing managers to assign or reassign cases as needed.			
179	HCV/Section 8	Complete tracking of Section 8 participants in the process of moving to new unit.			
180	Certifications	Maintain individual records that contain complete income, assets, expenses and references.			
181	Certifications	Maintain personal, bank and credit records.			
182	Certifications	Maintain and track community service requirements.			
183	Certifications	System automatically calculates Earned Income Disallowance and has a method to auto-add the appropriate certifications related to EID when batch-adding other inspections for a particular period.			
184	Certifications	Maintains FSS tracking and maintenance.			

No.	Category	Requirement	Response Code	Modification Cost	Comments
185	Certifications	Ability to enter FSS disbursements and forfeitures.			
186	Certifications	System generates monthly FSS escrow and interest postings.			
187	Certifications	Ability to have individual interest rates for each FSS participant.			
188	Certifications	History of past 50058s and history of unit, listing past residents.			
189	Certifications	Module must integrate with the Tenant Accounting and Section 8 modules.			
190	Certifications	Ability to have a client reside in both the Section 8 and Tenant Accounting modules at the same time.			
191	Certifications	Ability **to** put certifications on hold, start/complete another certification for the same tenant, and resume the original certification.			
192	Certifications	Tracks needed signatures on lease riders for all adult members in the unit.			
193	Certifications	Supervisors can track the progress of recertifications.			
194	Waiting List	Need to verify Social Security numbers for both accuracy in the PIC system and also that the applicant is not a resident in any other of our programs. Need to be able to check for duplicate subsidy from other Housing Authority or programs.			
195	Waiting List	Estimate rent calculations using income, assets, expenses and deductions.			
196	Waiting List	Track income targeting percentages by selected wait lists.			
197	Waiting List	Ability to display notes for applicants.			
198	Waiting List	Ability for applicants to apply online via website and have application information flow into Wait List program.			
199	Waiting List	Ability to make Wait List available in Spanish as well as English.			
200	Waiting List	Ability to pull vacant unit information daily.			
201	Waiting List	Ability to identify applicants who need accessible housing and identify available accessible units.			
202	Waiting List	Applications/waiting list multiple waiting lists with preference points ranking; income targeting categories with the ability to have different preferences for each waiting list.			
203	Waiting List	Ability to monitor/report time from voucher issuance to move-in.			
204	Waiting List	Ability to export waiting list for viewing and storing in Excel format for audit purposes.			
205	Waiting List	Ability to modify waiting list to meet audit requirements.			
206	Contract Admin.	Project-Based Section 8, TRACS, 50059 and 52670 processing and submission capability.			
207	Contract Admin.	HUD compliance and error checking prior to completion of 50059 and/or voucher processing.			
208	Contract Admin.	Ability to handle market-rent or non-subsidized units.			
209	Contract Admin.	Post rent/HAP to accounts.			
210	Contract Admin.	Capability to receive TRACS error messages.			
211	Contract Admin.	Manual and automated adjustments in Voucher processing.			

212	Contract Admin.	Ability to show move-in and move-out adjustments on the 52670 for both projects when a tenant moves from one project to another within the same monthly reporting period.			
213	Contract Admin.	Ability to mass create Gross Rent Charges by Project.			
214	Contract Admin.	History of previous 50059s are stored and available for viewing/printing.			
215	Contract Admin.	Verification processing: ability to automatically generate for each household member with merged data.			
216	Contract Admin.	Special claims and vacancy loss processing.			
217	Contract Admin.	Section 8 New Construction TRACS compliance.			
218	Contract Admin.	Waiting list history (showing who and when moved in).			
219	Work Order	Work order system: capability to track individual staff person; data also needs to allow multiple line items per work order for tracking.			
220	Work Order	Ability to track for pest extermination.			
221	Work Order	User-defined fields.			
222	Work Order	User-defined task code capability **(1,000** minimum).			
223	Work Order	User-defined work descriptions on pull-down menu.			
224	Work Order	Unlimited lines and character spacing in the work order description field.			
225	Work Order	Mobile app work order functionality.			
226	Work Order	Available space for side notes that do not appear on the printed work order.			
227	Work Order	Generate work orders by unit number, address, site or tenant name.			
228	Work Order	Generate multiple work orders for one address by selecting the address only once.			
229	Work Order	Generate multiple work orders for the entire development by selecting it as a batch.			
230	Work Order	Have multiple work order items and multiple employees appear on a single work order.			
231	Work Order	Designate "pet or service animal in unit" once for an address and have the designation default on subsequent work orders for the same address.			
232	Work Order	Copy and paste a work description from one work order to another.			
233	Work Order	Ability to notify someone of an outside contractor work order issued for their area by someone in another area (FYI with "read only" capability).			
No.	**Category**	**Requirement**	**Response Code**	**Modification Cost**	**Comments**
234	Work Order	Inventory and labor together on the work order for cost per work order-			
235	Work Order	Track the date, time and function performed by users of a specified work order.			
236	Work Order	Flag or color code emergency work orders not abated within 24 hours.			
237	Work Order	Flag non-emergency work orders not completed within 7 days.			
238	Work Order	Ability to schedule monthly, weekly and daily planned periodic maintenance.			
239	Work Order	Preventive maintenance scheduling with ability to generate work orders from preventive inspections.			

240	Work Order	Option to specify a start time to appear on all preventive/periodic work orders.			
241	Inventory	Physical inventory reports – Annual physical inventories require listings of fixed assets. These reports must list the physical location of all fixed assets by site (not project charged, assets may be located at a site other than where it was purchased)			
242	Inventory	Inventory tags – Ability to have the tag scanned			
243	Inventory	Warranties – Fixed asset inventories must be tracked through the system			
244	Inventory	Disposition – All disposed assets must still be maintained in a disposed file in the event of assets requiring reinstatement.			
245	Inventory	Integrated electronic filing system (document imaging system) to maintain warranties, purchase agreements, service contracts, etc.			
246	Inventory	Ability to enter on-line requisition			
247	Inventory	Ability to automatically e-mail notifications to alert approvers when requisition needs to be reviewed.			
248	Inventory	Ability to inquire from vendor level all open and closed purchase orders			
249	Inventory	Ability to inquire for user entered buyer all open and closed purchase orders			
250	Inventory	Ability to set and hold to budget parameters for a purchase order			
251	Inventory	Ability to enter contracts and edit at any time			
252	Inventory	Ability to track purchase orders against a particular contract.			
253	Inventory	Ability to enter and update vendors be restricted by security levels			
254	Inventory	Barcoding system to issue part to workorder			

VI. Customer Service and Support

A. Customer Support Services

1. Describe in detail the customer support services that are provided by your business.(tickets, response time, etc.)
2. Will we be assigned an account representative who will work with us through implementation?
3. Is a hotline telephone service part of your support? During what hours is this service available? Is there an additional charge for this service? How are support calls prioritized?
4. Do you ever charge extra for telephone support if the reported problem is a customer/user problem and not a software problem?
5. Do you provide an Internet Site with FAQs (Frequently Asked Questions), software patches, device drivers, etc.?
6. Is there a formal User Group for your products? Describe the relationship between the User Group and your organization: times they meet, etc. Are there user conferences or training events? Describe.

7. Do you offer consulting services to assist a business in defining, designing, and implementing custom enhancements to your system? Are the consultants your own employees or do you recommend third parties? How many consultants are available in the California?
8. How often is your software updated? When is the next scheduled update?
9. How are software updates tested prior to giving to users?
10. Describe your business' policy on modifications that might be made to your system per user's request. We have allot of reports that need to be in certain format to meet HUD guidelines or auditors' recommendations.

B. Customer Education

1. Describe the training/education options available to your customers.
2. Can training be provided on-site or at a location of our choice?
3. Describe any on-line training/tutorials available with your system.
4. Describe your "Train-the-Trainer" Program.
5. Are course materials provided for each training class?
6. Describe the specific training classes available for your system. Include the length of the class, suggested attendees, a short description of the class content, and the languages the classes are provided in.
7. Please provide an Education Services Course Catalog as an appendix to your response.

C. System Installation \ Implementation

1. Provide a "high-level" implementation plan for your proposed solution so that we may estimate the time requirements in light of our specific plans.
2. Discuss the installation support that you will provide, the geographic location of staff servicing this account, and the costs.
3. Discuss the technical and non-technical resources that you believe should be represented on our project team.
4. How soon can you deliver the system after contract execution?
5. Describe data conversion assistance you can provide during implementation from the current system?
6. Do you provide sample data with which to conduct system installation verification testing? Describe the testing process.
7. Describe the tools that are provided with the system to support user customization efforts.
8. Describe your ability and willingness to customize the proposed system.
9. What level of support do you provide for the conversion from our current systems to the new one?

D. System Maintenance Service

1. Is system maintenance included in the license fee for the software?
2. Describe your release schedule for maintenance updates; enhancement updates; tax/legislative updates. How long does it take to implement new changes in HUD statutes and regulations into your software? Do you have a warranty specifying timelines?

3. Must customers request an update release or are they sent automatically?
4. Describe how you determine the content of maintenance/enhancement releases.
5. Describe how your customers influence and contribute to the content of the enhancement update.
6. How many prior releases are supported?
7. Describe the contents of your system maintenance/update releases for the previous twelve (12) months and the date each was released.
8. If a product is discontinued or your company is sold, do you have any minimum guarantees for continued product support?

E. Documentation and On-line Help

1. Describe the documentation available for your system. How many copies are provided? Are any additional copies available? At what cost? May we reproduce the documentation for our own internal use?
2. Will you provide system documentation for our review?
3. Is the documentation available on-line? How thorough is the documentation? Do you have quick reference guides?
4. Is the documentation available in electronic form so that we may customize it if needed?
5. Are all applicable documentation updates associated with an enhancement or maintenance release provided at no additional charge?

VII. Cost

List in detail and summary the costs of obtaining and utilizing the system(s) described in your proposal. Please include initial costs, as well as on-going costs over the next five years for each of the following items:

No.		Cost / Notes
1	Application software license fee by module.	
2	System software license fee for operating system, database, application development tools, etc	
3	Report Writer license fee	
4	Training costs	
5	Data conversion costs	
6	Custom modification costs	
7	Other implementation assistance costs (i.e., travel)	
8	Miscellaneous other costs	
9	Annual maintenance fees	
10	Discuss what is included in the license fee and the cost of adding concurrent users.	
11	Provide a schedule of fees charged for programming, consulting, and other services.	
12	Describe, in lay terms, the warranty policy of the proposed system.	
13	Provide information on the cost of upgrades.	
14	Provide a sample copy of your license agreement.	
15	Describe your policy on multiple site licensing discounts.	
16	Hosting & Data Backup	
17	Landlord Portal	
18	Application Portal	
19	Tenant Portal	

VIII. References

Provide a complete list of current clients and a minimum of three (3) organizations that are using your proposed system and who can be contacted for reference purposes. Include the following information:

1. **Organization:** ______________________________
   Where Located: ______________________________
   Contact Person: ______________________________
   Contact's Title: ______________________________
   Contact's Phone Number: ______________________________
   Contact's E-mail Address: ______________________________
   Short system description (what installed, when, etc.): ______________________________

2. **Organization:** ______________________________
   Where Located: ______________________________
   Contact Person: ______________________________
   Contact's Title: ______________________________
   Contact's Phone Number: ______________________________
   Contact's E-mail Address: ______________________________
   Short system description (what installed, when, etc.): ______________________________

3. **Organization:** ______________________________
   Where Located: ______________________________
   Contact Person: ______________________________
   Contact's Title: ______________________________
   Contact's Phone Number: ______________________________
   Contact's E-mail Address: ______________________________
   Short system description (what installed, when, etc.): ______________________________

IX. Appendix

A. System Users and Transaction Volumes

Vendors should use the following information to assist in properly evaluating the number of users who will be accessing various modules within the system. The number of concurrent users will increase as the Housing Authority continues to grow.

Module	# of "Named" Users
Client Management	36
Accounting (G\L, A\R, A\P, Cash, Payroll, Notes and Bonds)	10
Purchasing/Inventory	6
Budgeting	5
Property Management	22
Grant Management	6
Report Writer	10
Human Resources	3
Contract Management	5

B. Transactions

Vendors should use the following information to assist in properly evaluating the throughput and data retention requirements:

Item	Value	Measurement
# of A/P Invoices	600	Monthly
# of A/P Checks	200	Monthly
# of Direct Deposit	500+	Monthly
# of Section 8 Landlord Checks	30	Monthly
# of Section 8 Landlord Deposits	500+	Monthly
# of Section 8 Leases	1,742	
# of Vendors	800+	
# of G/L Accounts/Sub-Accounts	15,000	
# of Journal Entries	300+/-	Monthly
# of Bank Accounts	60	
# of Housing Authority employees	60	
# of wait listed applicants	13,000+	
# of purchase orders	100	Monthly
# of contracts	175	
# of work orders	1,000+	Monthly
# of property sites	43	

SECTION 3 CERTIFICATION

PROJECT:
Imperial Valley Housing Authority - Housing Management & Accounting Software

1. Company name ____

   Address ____

2. Year business founded ____________________

3. Current number of employees: Full-time ________ Part-time _________

4. Trade or type of business:

   ____

5. Per "Section 3 Business Ranking Categories" criteria (attached with these RFP documents), is your company qualified as a Section 3 Business?
   Circle one:

   Yes ______________No __________

6. Check the Section 3 category for which your company is qualified.

   _______________Category 1 Business

   _______________Category 2 Business

   _______________Category 3 Business

7. Please explain why your firm is qualified for the Business Category you indicated above.

   ____

   ____

8. Please sign the following statement:

   As authorized representative of (name of company) __________________________________

   I certify that the above statements are true and if the company I represent is awarded the contract, we will carry out Section 3 hiring, training and subcontracting requirements.

   Signature ____ Date __________________

   Print your name___________________________________

SPECIAL PROPOSAL EVALUATION INSTRUCTIONS FOR SECTION 3 REQUIREMENTS

A. Section 3 of the Housing and Urban Development Act of 1968, as amended (as implemented at 24 CFR Part 135), requires that Housing Authorities and Agencies receiving HUD funding, to the greatest extent feasible, direct that funding to businesses that provide economic opportunities to low- and very low-income persons. Therefore, all prospective offerors are advised that:

1. Preference shall be given for Section 3 businesses in accordance with category priority ranking below (in descending order of priority). Offerors are responsible for providing all documentation or other information that supports the offeror's declared business category and must provide additional information if requested. The offeror shall be awarded the number of points corresponding to the business category definition for which the offeror qualifies:
   - **a. Category 1 business: 51** percent or more owned by residents of the housing development or developments for which Section 3 covered assistance is expended, or whose full-time, permanent workforce includes 30 percent of such residents as employees. **5 points**
   - **b. Category 2 business: 51** percent or more owned by residents of other housing developments or developments managed by the housing authority that is expending the Section 3 covered funding, or whose full-time, permanent workforce includes 30 percent such residents as employees. **3 points**
   - **c. Category 3 business: 51** percent or more owned by Section 3 residents, or whose full-time, permanent workforce includes no less than 30 percent Section 3 residents; or that subcontract in excess of 25 percent of the total amount of subcontracts to Category 1 or 2 businesses. **2 points**

2. The acceptability of offeror's proposed strategy for meeting the "greatest extent feasible" (Section 3 strategy) requirement shall be evaluated in accordance with the Section 3 evaluation factor. Offerors must clearly describe in their proposed strategy how the offeror will comply with the Section 3 training and employment preference, contracting preference, or both. Offerors should not merely affirm that they will comply with the Section requirements or the employment contracting numerical goals. If the offeror decides to submit a strategy, it must be included in the proposal.
   Section 3 Strategy: The quality of the offeror's proposed strategy for complying with the Section 3 training and employment and/or contracting "greatest extent feasible" requirements, including:
   - a. The clarity and detail of the offeror's proposed strategy.
   - b. The feasibility of the strategy.
   - c. The offeror's proposed numerical goals for employment and subcontracting.
   - d. The offeror's proposed strategy to obtain compliance by proposed subcontractors with training, employment and subcontracting goals.
   - e. The offeror's past and current efforts to provide training and employment opportunities to Section 3 residents and/or subcontracting opportunities to businesses that would be considered Section 3 businesses.

3. Five percent of the total points available are set aside for evaluation of the items in paragraphs (1) and (2) above.

4. Any contract award under this Request for Proposals shall be made to the responsible offeror (Section 3 business or other business) whose proposal is most advantageous considering price and all other evaluated factors.

NOTE: For purposes of this RFP, a "Section 3 resident" means: 1) a resident of a IVHA assisted housing program; or 2) a low-income or very low-income individual who resides in Imperial County, California. Below are the income guidelines for low-income residents in Imperial County.

2023 Income Limits		
Family Size	**Low Income (80% median)**	**Very Low-Income (50% median)**
1	46,200	28,900
2	52,800	33,000
3	59,400	37,150
4	65,950	41,250
5	71,250	44,550
6	76,550	47,850
7	81,800	51,150
8	87,100	54,450

IVHA staff understand that there may not be bona fide Section 3 contractors qualified to complete the Scope of Work called for in this invitation to bid. The contract will be awarded to the most qualified contractor with the best proposal.

B. Offerors are advised that the U.S. Department of HUD considers recipients of covered funding to be in compliance with Section 3 if they meet the minimum numerical goals set forth at 24 CFR Part 135.30i. Specifically, the goal that applies to this **RFP** is: **Three percent of the total dollar amount of all covered non-construction contracts shall be awarded to Section 3 business concerns.**

The successful offeror must commit to this numerical goal.