



Request For Proposals (RFP)

PHA/PROPERTY MANAGEMENT SOFTWARE

PROPOSALS are due in electronic format delivered to cjostovitz@hcaac.org
no later than 3:00 PM EDT October 14, 2020.

THE OFFEROR BEARS SOLE AND STRICT RESPONSIBILITY FOR SUBMITTING A RESPONSE TO THIS RFP AT THE OFFICES OF THE HOUSING COMMISSION ON OR BEFORE THE STATED TIME AND DATE. HCAAC WILL IN NO WAY BE RESPONSIBLE FOR DELAYS CAUSED BY THE UNITED STATES MAIL DELIVERY OR CAUSED BY ANY OTHER OCCURRENCE, EXCEPT FOR FAXED QUESTIONS SEEKING CLARIFICATION OF THIS RFP. HCAAC WILL NOT ACCEPT FAXED SUBMISSIONS.

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1. INTRODUCTION

The Housing Commission of Anne Arundel County (hereinafter, HCAAC) serves Anne Arundel County in Maryland with low-income housing resources for its residents. HCAAC's current inventory contained in its existing housing software consists of 1,655 Housing Choice Vouchers, 472 Public Housing units, 614 Tax Credit units, 357 Project Based Voucher units, and 39 market rent units.

HCAAC has approximately 15 personnel in Property Management that accesses main-office systems remotely from off-site management offices. There are 35 personnel in the HCV, Eligibility, and administrative departments accessing systems at the main office.

Existing HCAAC software provides: waiting list management; certifications for HCV, LIPH, and LIHTC; rent statements and HAP check payments; unit management and inspections; procurement processing, inventory tracking, and asset tracking; general ledger processing; accounts payable & receivable processing; and reporting.

2. NOTICE

HCAAC is soliciting Proposals from professional entities to provide a unified property management/PHA software and services solution.

Offerors submitting proposals to the RFP must not be debarred, suspended, or otherwise prohibited from professional practice by any Federal, State, or Local Agency.

Copies of the RFP may be obtained from the hcaac.com website under the Solicitations section.

Proposals in response to this RFP are due no later than October 14, 2020, at 3:00 PM EDT, and should be sent electronically to cjostovitz@hcaac.org. Electronic submissions should include “Proposal: Housing Software RFP” in the subject line. An email read-receipt is recommended when submitting your proposal.

Questions regarding this RFP should be directed in writing to Christopher Ostovitz at cjostovitz@hcaac.org by 3:00 PM EDT on October 7, 2020. Questions will only be accepted through email.

HCAAC is an Equal Opportunity Employer. It does not discriminate and does not do business with others who discriminate on the basis of race, color, national origin, sex, religion, age, familial status, disability, marital status, ancestry, sexual orientation, or gender identity in the employment or provision of services. HCAAC is a Public Housing Agency and does not operate under the guidelines stipulated for Indian Housing Authorities.

HCAAC reserves the right to reject any and all proposals.

3. SCOPE OF WORK

Requested software solution functionality:

- Software should follow appropriate NIST standards (or better) for information security, and the protection of personally identifiable information.
- Software must exist as a secure, hosted solution (SaaS) that does not require HCAAC server hardware, just the individual front-line user computers/devices.
- Proposed solution must clearly illustrate all hardware or software requirements to use the solution. Software above-and-beyond end-user operating systems or common office productivity software (e.g. Adobe Acrobat Reader, Microsoft Office, Google Chrome, etc.), should be included in the proposed solution.
- HCAAC must always retain ownership of its data. HCAAC should have regular database backups kept in-house at HCAAC.
- Software must be able to extract data efficiently, accurately, and in the correct regulatory format, for the purpose of keeping HCAAC in compliance with any and all current and future regulators. E.g. 1099 submissions to the IRS Fire system, 50058 submissions to HUD’s PIC system, EOY data reporting for the State of Maryland’s LIHTC reporting, etc. It is expected that the software provider will keep up with all required standards of reporting relevant to HCAAC’s compliance needs.
- Software should follow User Experience best practices. It should have system-wide consistency for navigation and use. Content should be easily findable and credibly accurate.
- Financial systems:
 - Should follow accounting standards and have measures in place to minimize/prevent audit findings.
 - Can track and manage multiple fiscal/calendar year financials, HCAAC companies/corporations, bank accounts, loans/financing (bridge, gap, etc.), program regulations/expenses, and departmental budgets.
 - Will provide appropriate auditor access when necessary.
 - Have current and historical reporting for income, revenue, expenses, and budgets.
 - Should have modern payment processing solutions integrated, including a web interface to receive electronic payments from outside of HCAAC and automated methods to reconcile AR or AP payments.

- Applications systems:
 - Must prevent duplicate client/family member existences on client or staff data entry.
 - Must follow fair housing rules, inviting clients in appropriate order from waiting lists.
 - Should provide an appropriate and integrated client-purge notification and methodology to keep lists fresh and valid.
 - Should be able to pre-pool clients for final validation before being housed.
 - Should have the ability to create multiple types of mass and individual communications, including paper documents, emails, and client-portal postings.
 - Should be able to report on all manner of data points for all members of all households waiting for housing (demographics, needs, time on list(s), etc.).
 - Must have a live, client-side mobile app/web portal to receive applications, family data updates, and interact with clients for invites, purges, or other necessary dialogs.
- Property Management systems:
 - Should be able to appropriately run a property management company that serves LIPH clients, market rate clients, LIHTC clients, and commercial clients.
 - Should appropriately work with the Voucher systems for LIHTC and Project-based voucher functionality.
 - Must conform to appropriate regulations for accurate data file reporting to regulators (TICs, 50058s, NAHMA-compliance, etc.).
 - Should be able to interpret errored data submissions from regulators to assist in correction (e.g. 50058 submission errors).
 - Should provide a work order interface on mobile devices for maintenance staff and/or crews with realtime work order notifications and time/materials tracking of repairs.
 - Can analyze vacant unit information to comply with Tax Credit and HUD regulations.
 - Should provide accurate, customizable client statements as paper, automated email, or a client-portal delivery.
 - Should provide automatic rent receipting if appropriate (client ACH, debit card processing, etc.).
 - Must have any regulatory tracking of client assistance add-ons like FSS, community service, or congregate services.
- Voucher systems:
 - Should appropriately interact with the Property Management systems for proper LIHTC/Project-based functionality.
 - Should have accurate, live VMS functionality, maximizing voucher utilization.
 - Must be able to follow appropriate regulations and accurately report data files to regulatory agencies.
 - Should be able to interpret errored data submissions from regulators to assist in correction.
- Inspection systems:
 - Should provide an HQS inspection interface on mobile devices for inspectors to use in the field.
 - Should have scheduling that can generate appropriate communications with paper, email, or client/vendor-portal updates.
 - Should be able to audit and prevent missed annual or biennial inspections.
 - Should be able to receive and store inspection photos from in the field mobile devices, to be viewed later in the desktop version of the software.
 - Can auto-generate work orders for Property Management inspections.
- Procurement systems:
 - Should provide warehousing and robust tracking of inventory and assets in their appropriate locations, allowing for bar-coded, on-site inventory checking with mobile devices.

- Should interact with the Property Management system when inventory or assets are used with work orders.
- Should have a governable purchasing system, where end-users are allowed to purchase finite and defined dollar amounts, and/or limited catalog items, which are all automatically charged to the correct General Ledger accounts.
- Should appropriately interact with the Financial system when ordering, invoicing, asset/inventory tracking, and auditing.
- Above systems should all have a note function to be populated with any appropriate automated or manual notes, along with document attachments, all that “follow” their appropriate digital entities. Any previous/historical system notes should be migrated and available in this system.
- Different modules and pieces of modules should have granular security to control what an end-user can do or see, with Offeror having easy-to-use defaults already created in the system.
- When sections of the software interact with data from a different part of the software, information should be live, and up-to-date, with minimal processes the end-user must complete for the data to be updated.
- Reporting that can support hundreds of highly customized reports/letters with integrated database fields, filtering, barcodes, and tracking. The conversion/import of these should be included in the proposal.
- Existing auditable client/vendor/financial transactions should be converted into the new system. The conversion/import/verification of these should be included in the proposal.
- The ability to add customizable fields for internal housing authority use.
- The ability 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. Electronic files must have an integrated lifecycle/digital workflow with system procedures.
- HCAAC Customer-facing features within mobile app(s) and/or web site(s):
 - Should securely protect customer information and provide an interface with accessibility in mind.
 - A customer should have a method to communicate with either individual HCAAC staff, or a designated group, where appropriate.
 - HCAAC staff should be able to communicate with the customer individually or en masse (with criteria) via: the app/site; with branded-domain (@hcaac.org) SMTP server emailing; with paper letter creation for postal mail.
 - Communications should be available for appropriate customers for: applications; waiting list invitations; waiting list purge notices and responses; client certifications & lease agreements; landlord-advertised units; client work order lifecycle; client/landlord inspection lifecycle; client/landlord monthly statements; landlord/vendor tax info (W4 submission/updates, 1099 delivery & storage); and procurement invoice submission/processing.
 - Customers with balances must be able to pay money specific to those balances to HCAAC within an app or website via direct bank account withdrawal or credit card/debit card submission.

4. VENDOR SPECIFICATIONS

- Provide a brief description of the hardware your software will run on acceptably. Are there future types of hardware/operating systems that HCAAC should plan for future versions of the software?

- Are there hardware/software requirements to interact with the system on a mobile device (tablet, mobile phone, etc.)? Is there a plan to keep compatibility with any device, or not support one in the future?
 - Are there different requirements for HCAAC administrators with suggested software or skills?
 - Is there recommended data network requirements for the software to run appropriately?
 - What are the customer support services that are provided by your company?
 - Do I receive a certain amount of support annually? If it is hourly, how is that calculated? Is there a cost for additional support?
 - What is the expected turnaround time for a support ticket?
 - Do specific HCAAC staff contact support for issues, or can any staff contact support?
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5. VENDOR EXPERIENCE

Please provide information in the format you feel best represents your company. Please be sure that each of the following concepts/questions is addressed:

- Describe your primary business. Provide a short history of your business, including when it was founded, any major milestone events.
 - Discuss the factors that differentiate your system and service from systems and services offered by other vendors.
 - How many customers do you have in total? Please provide references that we may contact.
 - Are we required to attend any meetings, annual, or training? Outline any costs involved.
 - What methods are used to keep the software's functionality up-to-date with changing regulatory needs? Are these updates included in this proposal, or are there additional costs for HCAAC?
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6. PROPOSAL FORMAT

The vendor is to provide a proposal that encompasses the following:

- Capabilities of the vendor to meet client needs
 - Applications software features and functions
 - Software technical specifications and requirements
 - Hardware technical specifications and requirements
 - System support and maintenance services
 - Implementation and training
 - Comprehensive list of costs and fees
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7. SELECTION PROCESS

HCAAC will review the submittals in accordance with the Evaluation Criteria in this section. HCAAC's anticipated schedule for the RFP is as follows.

9/23/2020 - RFP available for distribution

10/7/2020 - Final day to submit written questions 3:00 PM EDT

10/14/2020 - RFP closed proposals due 3:00 PM EDT

10/14/2020 - Last day for a request to demonstrate of one or more proposed items

HCAAC will respond about proposal award no later than 45 days after due date

Proposals will be evaluated and scored by an internal HCAAC committee. Committee members will review proposals and score them as below:

- ___ How well the proposal fulfills the general scope of work (max 20 points)
 - ___ How well the proposal fulfills the scope of work for systems (max 20 points)
 - ___ How well the proposal fulfills the scope of work for the customer-facing features (max 10 points)
 - ___ Rate the proposed support in Vendor Specifications (max 10 points)
 - ___ Vendor experience and/or references (max 20 points)
 - ___ Proposal cost (max 10 points)
 - ___ Proposal recurring annual fees (max 10 points)

 - ___ Total points (max 100 points)
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8. MISCELLANEOUS

Expense of RFP Submissions

The Offeror shall bear all expenses incurred in the preparation and submission of proposals in response to this RFP.

HCAAC Options

HCAAC reserves the right at any time, in its sole discretion and for any reason, to do any or all of the following:

- Cancel and/or reissue the RFP, and/or reject all proposals;
- Reject, in whole or in part, any or all proposals received in response to this RFP which are incomplete and/or non-responsive;
- Waive or correct any immaterial defect or technical error in any response, proposal or proposal procedure, as part of the RFP or any subsequent negotiation process;
- Request that certain or all Offerors to this RFP supplement or modify certain aspects of the information or proposals submitted;
- Modify the selection procedure, the scope of the proposed project or the required responses; and,
- Extend deadlines for accepting proposals, request amendments to proposals after expiration deadlines, or negotiate or approve final agreements.

HCAAC Discretion

The determination of the criteria and process whereby responses are evaluated, the decision as to who shall receive a contract award, or whether or not an award shall be made as a result of this RFP, shall be at the sole and absolute discretion of HCAAC.

No Claim Against HCAAC

An Offeror shall not obtain, by submitting a proposal in response to this RFP, any claim of any sort against HCAAC or HCAAC property by reason of all or any part of any of the following:

- Any aspect of this RFP;

- The selection process;
- The rejection of any or all offers;
- The acceptance of any offer;
- Entering into any agreements or the failure to enter into any agreements;
- Any statements, representations, acts or omissions of HCAAC to any person or entity acting on its behalf; the exercise of any discretion set forth in or concerning any of the foregoing; and,
- Any other matters arising out of the foregoing.

Personnel

In submitting their proposals, Offerors are representing that the personnel described in their proposals shall be available to perform the services described from first to last, barring illness, accident, or other unforeseeable events of a similar nature in which cases the Offeror must be able to provide a comparably qualified replacement. Furthermore, all personnel shall be considered to be, at all times, the sole employees of the consulting firm under its sole direction, and not employees or agents of HCAAC.

Level of Effort and Funding

It should be clearly understood that all services requested in this RFP are on an “as needed basis” and that any dollar value referred to in this RFP in any way constitutes a guarantee of the level of effort that may be requested of the successful Offeror, or guarantee a certain dollar amount.

Rules, Laws, and Regulations

The Agent shall comply with all laws, ordinances and regulation applicable to the services contemplated herein, especially those applicable to conflicts of interest. HCAAC will presume that Offerors are familiar with all federal, state, and local laws, ordinances, codes, rules, and regulations that may in any way affect the services.