

REQUEST FOR PROPOSALS FOR Housing Authority Property & Resource Management System

(Qualifications & Cost)

The Allen Metropolitan Housing Authority (“AMHA”) will receive Requests for Proposals for the following services no later than **4:30 pm, local time, on 2/26/2024**. Proposals received after this date and time will not be considered. Respondents are required to complete and submit all forms listed at the end of this document.

BASIC DEMOGRAPHICS

AMHA is a government housing authority headquartered in Lima, Ohio. It serves Allen, Auglaize, Hardin, Mercer, Putnam, and Van Wert counties. It owns approximately 247 low-income housing units (a.k.a. “Public Housing”) and manages approximately 1,058 Housing Choice Vouchers (a.k.a. “Section 8”). AMHA employs approximately 22 staff across 2 administrative sites, all with high-speed Internet access.

GENERAL

The intent of this RFP is to solicit proposals for the purpose of entering into a contract with a qualified vendor to provide an enterprise-wide software application-based Property & Resource Management System solution that will enable staff to run all aspects of housing management effectively and efficiently. The solution must clearly demonstrate the ability to conform to all requirements of project-based accounting, budgeting, and management, while abiding by all requirements of the Department of Housing and Urban Development (HUD) and Generally Accepted Accounting Principles (GAAP). The proposer shall document experience and references regarding successfully transitioning Public Housing Agencies from the Tenmast WinTen2+ ecosystem to the proposed ecosystem.

RFP CONTACT

Jennifer Lefik
Section 8 Manager
600 S Main St.
Lima, OH 45804

Phone: 419-228-6065
email: Jlefik@allenmha.com

All inquiries or requests regarding this procurement shall be submitted to the RFP CONTACT in writing. Respondents may contact ONLY the RFP CONTACT regarding the procurement. No other AMHA employees have the authority to respond on behalf of the Authority.

RFP SCHEDULE

The AMHA will make every effort to adhere to the following schedule:

RFP Action	Date
Issue RFP	2/6/2024
Deadline for Proposal Submission (proposals received after this day and time will not be considered)	2/26/2024
Contract Award (Contract may be awarded for up to 120 days after submission date)	TBD

SCOPE OF SERVICES/DELIVERABLES

AMHA seeks a solution that can deliver the following functions as a minimum.

Desirable Business-operation Functions:

Function	General Description
Accounts Payable	Manage outgoing payments, including ACH with "payment applied to" commenting ability.
Accounts Receivable (Tenant Accounting)	Tenant financial management and in-person payment processing.
Analytic Tools	Ability to natively analyze data and present results in some way.
Applicant Waiting List	Manage multiple waiting lists.
Appointment Reminder Call System (ARCS)	Generate reminder calls for inspections and certification appointments.
Bank Reconciliation budgeting	Ability to reconcile receivable and payable statuses.
Budget Forecasting	Project future budget needs based on a variety of criteria.
Budget Management	Creating and managing budgets.
Building/Unit Management	Ability to create and manage single and multi-unit properties.
Capital Fund Accounting	Manage accounting functions for Capital Projects, such as being able to tie transactions to General Ledger.
Check Reconciliation	Reconcile bank statements with General Ledger.
Community e-Engagement System	Bulk text message, phone call, and/or email with tenants, applications, landlords with messages or bulletins; ability to setup automated responses to outside inquiries.
Contract Management	A system of keeping track of awarded vendors and their required documentation (such as required insurances, etc.).
Dashboarding	Executive Dashboard for key elements (Vacancy Rate, Turnover Days, etc.).
Electronic Document Storage (Participants)	PDFs are created and uploaded/attached to participant records and easily retrieved.
Electronic Signing of Participant Forms	Participants can e-sign required forms within a portal.
Electronic Signing of Business Forms	Employees can e-sign business forms.
Family Self Sufficiency	Program management including escrows.
Fixed Assets Accounting	Accounting and inventory management of fixed assets (including depreciation).

General Ledger	Syncing with the finance functions of all other applicable modules.
Grant Management	Program management.
Homeownership Program	Program management.
HUD Reporting: FDS Processing	Ability to conform with this HUD requirement.
HUD Reporting: PHAS Reporting	Ability to support appropriate data submission to HUD.
HUD Reporting: SEMAP	Ability to support appropriate data submission to HUD.
HUD's Two-year Tool (TYT)	Support for HUD's TYT program.
Inspections: Leasing Operations	Data entry and retrieval, fully compatible with HUD NSPIRE system. HCD units for HQS & UPCS.
Inspections: Leasing Operations Mobile App	Support for Android Tablets.
Inspections: Public Housing	Unit inspection module for Public Housing Units.
Inspections: Public Housing Mobile App	Support for Android Tablets.
Inventory: Consumable	Manage multiple warehouse inventories. Sync with purchase orders and work orders.
Portal: Applicant	Accept online applications.
Portal: Landlord/Owner	Online portal to allow landlords to view HAP checks, inspections results, and list properties available for rent.
Portal: Rent Payment	Pay rent online through debit, credit card, ACH, MoneyGram, lockbox with ability to pay arrears (debts owed).
Portal: Tenant work order	Online portal for tenants to submit work orders.
Portal: Tenant/Participant	Online, tenants can update personal information, income, perform recertifications online, and pay rent.
Property Security	Log and report security incidents and track "banned individuals" including their PII, photo, and license plate numbers.
Purchase Order	Creation and management of both Purchase Orders (one-time) and Blanket Purchase Orders (multiple purchases over time).
Purchase Order Requisitions	Allow departments to enter requisitions that then flow through an approval process.
Report Writer (accessible)	Databases are available to external reporting engines such as Crystal Reports (example only).
Report Writer (embedded)	Built-in system to create custom reports and letters based on the data contained in the system.
Resident Background Check	Criminal background screening and credit reports.
Section 8 Tenant & Landlord Management	Issues HAP checks, portability, submit to VMS.
Tenant: Mod-Rehab	Program management.
Transnet For PIC	PIC submission management and error reporting and ability to reconcile PIC with VMS.
Vouchers: Emergency Housing	Management of the Emergency Housing Tenant Voucher program and alerting if rent burden exceeds 40% of income and distinguish between applicants and participants in the move process.
Vouchers: Housing Choice	Program management and alerting if rent burden exceeds 40% of income and distinguish between applicants and participants in the move process.

Vouchers: Project Based Vouchers	Program management and alerting if rent burden exceeds 40% of income and distinguish between applicants and participants in the move process.
Work Order	Creation and management of maintenance work orders.
Work Order Mobile App	Mobile version of work orders. Active data connection not required.

Desirable Service-operation Functions:

Function	General Description
Pre-implementation Orientation	Provide a module-by-module introduction to specific subject-matter teams to give them an overarching summary of each module's function and how it interacts with others.
Data Conversion	Production data for the most recent 5 years shall be converted for use by the proposed solution. All data prior to that shall be converted into a format that will allow for historic reporting and a data reporting tool to accomplish that task shall be included.
Training (Leadership)	Deliver a module-by-module immersion event to specific subject-matter leaders and Super Users (users who will become Subject-Matter-Experts).
System Configuration	Utilize feedback from "Training (Leadership)" to prepare and pre-configure the solution according to their inputs.
Acceptance Testing	Coordinate the acceptance testing and approval process for every module.
Training (Staff, at launch)	Establish a schedule of training for general staff, using the setup parameters established and solidified in "System Configuration" and "Acceptance Testing" above.
Cutover and white-glove 120-day launch support	Coordinate cutover approach and provide immediate (2 business hours or less), "white glove" support to address all issues that present themselves for 120 days after launch.
Ongoing Support and Help Desk Services	Ability to both email and call-in for product support. All inquiries shall be logged and trackable by both vendor and RHA. Vendor shall communicate available SLAs as part of their proposal.
Ongoing Training	A strategy for providing periodic instructor-lead and/or pre-recorded online training, after launch.
Custom Services	A strategy for quoting and delivering services that are outside of the bounds of being routine. In one example, (but not limited to): having vendor create a report (or other task) on behalf of RHA.
Administration as a Service	The vendor acts as a systems administrator (creating, deleting, managing user accounts, and account access), following requests submitted by RHA individuals who are authorized to do so.
Account Management	Vendor shall commit to weekly, 30-minute, Teams-based teleconferences to review account status, service requests, and other action items to support the business relationship.

SaaS & Data Backup	Cloud hosted, accessed via browser. Data backup methodology in place. Business Continuity/Recovery plan in place.
System Updates	The system shall be kept current with regular updates to maintain compliance with federal mandates.

Desirable Financial Factors:

Function	General Description
Invoicing Timeliness	Invoices for products and services shall be delivered as PDF documents to Kelwer@allenmha.com no later than 10-days after final delivery. Invoices received later than 45 days after final delivery shall be subject to a Formal Challenge (see “Invoice Auditing/Challenging” item below).
Invoicing Detail	Invoices shall be specific as to the product and/or service for which payment is sought. Line-item detail shall be included. All invoices shall reference a directly related Purchase Order (“PO”) or Blanket Purchase Order (“BPO”).
Invoice Payment	NET30
Invoice Auditing/Challenging	Should an invoice fail to meet AMHA’s payment standards (based on commonly understood Generally Acceptable Accounting Practices), AMHA shall be authorized to issue a formal Request for Review with the vendor during which time the invoice payment terms shall be considered “frozen” until mutually resolved. The vendors assigned Account Manager shall be AMHA’s point-of-contact for initiating an invoice review.

FORM OF PROPOSAL

The best scored Proposals are those that are straightforward, clear, concise, and specific to the information requested. To be considered complete, the submitted proposal must provide all information requested in *Attachment A – RFP Response Guidance/Template*, along with the forms indicated in the section titled, “FORMS TO BE COMPLETED AND RETURNED”.

EVALUATION FACTORS

FACTOR	WEIGHT
A. Understanding conveyed in the Letter of Interest <ul style="list-style-type: none">The degree to which the Letter of Interest indicates that the responder understands the RFP’s intent as described in the section titled, “GENERAL” on RFP Page 1.	5 points
B. Quality of Proposal <ul style="list-style-type: none">The degree to which people who are not Subject Matter Experts can locate all required and fully completed documents in the proposal as shown in RFP sections titled, “INSURANCE REQUIREMENTS” and “LIST OF ATTACHMENTS”.	10 points
C. Related Experience and Professional Qualifications <ul style="list-style-type: none">The degree to which people who are not Subject Matter Experts can use the provided REFERENCES to see that proposer is qualified to deliver a successful outcome for AMHA, including documentation that the proposer has successful experience transitioning Public Housing Authorities away from Tenmast’s WinTen2+ ecosystem.The degree to which people who are not Subject Matter Experts can see that the <i>initially assigned personnel’s QUALIFICATIONS</i> are sufficient to deliver a successful outcome for AMHA.	20 points 10 points
D. Quality of Proposed Solution <ul style="list-style-type: none">The degree to which people who are not Subject Matter Experts can determine that the proposal meets AMHA’s DESIRED CAPABILITIES.	35 points
E. Costs <ul style="list-style-type: none">The degree to which there is evidence of competitive overall pricing shown in FINANCIALS, TIMELINE, AND DEPENDENCIES > FINANCIALS, and the costs are easily understood and deemed reasonable by individuals who are not Subject Matter Experts.	20 points
Total points awardable from the above section	100 points
F. BONUS: If the Proposal includes Section 3 qualification.	5 pts
G. BONUS: If the Proposal includes (M)WBE certification.	5 pts
Total points awardable, including the bonus items above	110 Points

EVALUATION PROCESS

1. The Allen Metropolitan Housing Authority will establish a committee and will evaluate all responses. The

evaluation of the proposals shall be within the sole judgment and discretion of the committee, who will make the final decision.

2. The committee will recommend award to the responder(s) who, in its opinion, has submitted the proposal that best serves the overall interests of the Allen Metropolitan Housing Authority. AMHA will negotiate with the highest ranked responders to arrive at an agreeable cost. If an agreeable cost cannot be obtained, AMHA will begin negotiations with the second highest ranked responder, and so on. AMHA recommends that responders submit their most favorable pricing as AMHA reserves the right to award a contract(s) without entering into negotiations.

If the evaluating committee determines that two or more responders are found to be within a competitive range and an award requires further review, the responders within the competitive range will be contacted and requested to attend a formal interview. AMHA will evaluate and select the most highly qualified responders from the interview per the following qualifications:

Evaluation Factors	Weight of Factor
A. Degree to which DESIRED CAPABILITIES are deemed by Subject Matter Experts to have been met.	35 points
B. Degree to which acquisition and implementation costs and timeline are deemed by Subject Matter Experts to be acceptable.	25 points
C. Degree to which maintenance and sustainability costs are deemed by Subject Matter Experts to be acceptable.	25 points
D. Degree to which the proposer's business operations and processes are perceived by Subject Matter Experts to be mature, advantageous to RHA operations, and easy to engage.	15 points

AWARD

1. The AMHA reserves the right to award single or multiple contracts.
2. The AMHA reserves the right to reject any or all responses that materially differ from any terms contained herein or from any Attachments hereto and to waive informalities and minor irregularities in responses received.
3. By submitting a proposal, a respondent acknowledges and agrees that AMHA may, at any time and at its sole discretion, and without any liability to a respondent, reject any and all proposals, cancel this RFP and solicit new proposals under another acquisition process.
4. A prequalification meeting may be held with the responders to clarify any requirements of the RFP or contract and to answer general questions.
5. Board approval to award a contract is required. Responders will be notified in writing after Board approval. Responders that are not selected will be notified by mail.
6. *Attachment A – RFP Response Guidance/Template* will be the basis for the contract. The RFP specifications, terms, conditions and Attachments, RFP Addenda and Responder's proposal, shall be incorporated into and made a part of the contract that may be awarded as a result of this RFP.

INSURANCE REQUIREMENTS

The successful Awardee shall provide AMHA with evidence of all appropriate and applicable insurance coverage, including policy coverage periods. Awardee shall furnish AMHA with certificates of insurance showing that the following insurance is in force and will insure all operations under this RFP. Required insurance levels are as follows (only those with ☒-marks apply to this RFP):

- ☒ **Professional Liability Insurance** - The successful awardee shall maintain a policy of professional liability insurance in the amount of at least \$1,000,000 per occurrence.
- ☒ **Workers' Compensation** in accordance with the State of Ohio rules and regulations.
- ☒ **General Liability Insurance** with a single limit for bodily injury of \$1,000,000 per occurrence and property damage

limit of no less than \$1,000,000 per occurrence.

☒ **Automobile liability** on owned and non-owned motor vehicles used on the site(s) or in connection herewith for a combined single limit of bodily injury and property damage of not less than \$1,000,000 per occurrence.

☒ **Cybersecurity Liability Insurance** of no less than \$1,000,000 naming Allen Metropolitan Housing Authority as beneficiary should a SaaS-delivered system become compromised and result in a material loss to AMHA or data breach.

All insurance shall be carried with companies that are financially responsible and admitted to do business in the State of Ohio. Awardee shall not permit the insurance policies required to lapse during the period for which the contract is in effect. All certificates of insurance shall provide that no coverage may be cancelled or non-renewed by the insurance company until at least thirty (30) day's prior written notice has been given to AMHA.

CONTRACT TERMS

The contract term shall be as follows:

Upon award, AMHA shall generate a "blanket PO", to cover all work within the agreed-to scope and timeline. All invoicing from the Awardee shall reference the "BPO number" and agree to "Net30" payment terms.

Invoices shall provide milestone-level detail with sufficient information to show that the milestone has been reached and payment is indicated.

All changes to the scope of work must be requested in writing and approved by AMHA. AMHA will not compensate an awardee for work outside of the approved scope without prior written authorization.

STANDARDS OF CONDUCT

The Awardee shall be responsible for maintaining satisfactory standards of employees' competency, conduct, courtesy, appearance, honesty, integrity, and shall be responsible for taking such disciplinary action with respect to any employee, as may be necessary.

CANCELLATION

Irrespective of any default hereunder, AMHA may at any time at its discretion cancel the contract in whole or in part, and in such event the firm shall be entitled to receive equitable compensation for all work completed and accepted, prior to such termination or cancellation. The contractor may cancel this contract without fault by providing sixty (60) days written notice to AMHA of such cancellation.

LIST OF ATTACHMENTS (Only those with ☒ are attached to this RFP)

- ☒ Attachment A – RFP Response Guidance/Template
- ☒ Affidavit of Non-Collusion
- ☒ Acknowledgement of HUD documents
- ☒ HUD Form 5369-B, Instructions for Offerors / Non-Construction
- ☒ HUD Form 5369-C, Certifications and Representations of Offerors
- ☒ HUD Form 5370-C, Section I, General Contract Conditions, Non-Construction
- ☒ HUD Form 51915-A Contract Provisions Required by Federal Law
- ☒ Acknowledgement of Principal (Three versions: Corporation, Partnership, or Individual) W-9

FORMS TO BE COMPLETED AND RETURNED

Unless otherwise indicated, the following items (marked with ☒) must be completed and returned with the proposal:

- ☒ Attachment A – RFP Response Guidance/Template
- ☒ Affidavit of Non-Collusion
- ☒ Acknowledgement of HUD documents (properly notarized)
- ☒ HUD Form 5369-B, Instructions for Offerors / Non-Construction
- ☒ HUD Form 5369-C, Certifications and Representations of Offerors
- ☒ HUD Form 5370-C, Section I, General Contract Conditions, Non-Construction

- ☒ HUD Form 51915-A Contract Provisions Required by Federal Law
- ☒ Acknowledgement of Principal (W-9)

Note: Items in the section titled "INSURANCE REQUIREMENTS" (marked with ☒) shall be due upon final award.

Attachments Follow

ATTACHMENT A – RFP RESPONSE GUIDANCE/TEMPLATE

Embed your entire proposal within this template and return it as directed in INSTRUCTIONS below.

20240206 - Housing Authority Property & Resource Management System

INSTRUCTIONS

Use ATTACHMENT A as a template to complete. Areas in GREEN TEXT require your input.

For electronic and Email delivered submissions	For paper printed and box-delivered submissions
Complete the template below. Starting with this page, print it as a PDF with the name: RFP ##### Response (CompanyName).pdf where “#####” is the RFP number shown above, and “CompanyName” is replaced by <u>your</u> company name.	It is preferred that the template included below be used to generate your submission, even if you prefer to print it and have it delivered.
Email it along with all completed forms as attachments to the email address shown previously in this RFP.	If the use of a template is impractical in your opinion, you may create your own package that EXACTLY mimics the field titles from the template along with the information it requires. All fields must remain in the order that they appear in the template, without modification.
Note: Assure the size of any one email is no larger than 25mb. Send multiple sequential emails if needed.	The proposer shall provide an original and three (3) copies of their proposal, each bound individually and delivered in a sealed package to the RHA Procurement address noted previously. The box shall include the RFP number, the Proposer’s company name and address clearly displayed.
Acknowledgements shall be made via email.	

Proposing firm: Replace the text that appears in GREEN with your own text.

Proposing Firm

Click or tab here to enter the name and address of the responding firm.

Name and contact method(s) of primary contact person for this proposal.

Click or tap here to enter text.

LETTER OF INTRODUCTION

Use the expandable field below to offer any free-form introduction that you desire, limiting yourself to a single page in length.

Click or tap here to enter text.

DESIRED CAPABILITIES

Mark (with ☑) all functions that your proposal can address. Use the space afterward to offer any additional detail that you wish for each item.

Function	General Description
Accounts Payable	Manage outgoing payments, including ACH with "payment applied to" commenting ability.
<input type="checkbox"/> Select checkbox if this function is present in your proposed solution. [If desired, you may click here to provide greater detail on how your proposed solution addresses this item.]	
Accounts Receivable (Tenant Accounting)	Tenant financial management and in-person payment processing.
<input type="checkbox"/> Select checkbox if this function is present in your proposed solution. [If desired, you may click here to provide greater detail on how your proposed solution addresses this item.]	
Analytic Tools	Ability to natively analyze data and present results in some way.
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Applicant Waiting List	Manage multiple waiting lists.
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Appointment Reminder Call System (ARCS)	Generate reminder calls for inspections and certification appointments.
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Bank Reconciliation budgeting	Ability to reconcile receivable and payable statuses.
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Budget Forecasting	Project future budget needs based on a variety of criteria.
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Budget Management	Creating and managing budgets.
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Building/Unit Management	Ability to create and manage single and multi-unit properties.
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Capital Fund Accounting	Manage accounting functions for Capital Projects, such as being able to tie transactions to General Ledger.
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Check Reconciliation	Reconcile bank statements with General Ledger.
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Dashboarding	Executive Dashboard for key elements (Vacancy Rate, Turnover Days, etc.).
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Electronic Document Storage (Participants)	PDFs are created and uploaded/attached to participant records and easily retrieved.
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Fixed Assets Accounting	Accounting and inventory management of fixed assets (including depreciation).
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General Ledger	Syncing with the finance functions of all other applicable modules.
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Inspections: Leasing Operations Mobile App	Support for Android Tablets.
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Inspections: Public Housing	Unit inspection module for Public Housing Units.
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PIC Management Services	Perform all PIC operations on behalf of the Authority.
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Portal: Applicant	Accept online applications.
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Property Security	Log and report security incidents and track "banned individuals" including their PII, photo, and license plate numbers.
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Tenant: Mod-Rehab	Program management.
<input type="checkbox"/> Select checkbox if this function is present in your proposed solution. [If desired, you may click here to provide greater detail on how your proposed solution addresses this item.]	
Transnet For PIC	PIC submission management and error reporting and ability to reconcile PIC with VMS.
<input type="checkbox"/> Select checkbox if this function is present in your proposed solution. [If desired, you may click here to provide greater detail on how your proposed solution addresses this item.]	
Vouchers: Emergency Housing	Management of the Emergency Housing Tenant Voucher program and alerting if rent burden exceeds 40% of income and distinguish between applicants and participants in the move process.
<input type="checkbox"/> Select checkbox if this function is present in your proposed solution. [If desired, you may click here to provide greater detail on how your proposed solution addresses this item.]	
Vouchers: Housing Choice	Program management and alerting if rent burden exceeds 40% of income and distinguish between applicants and participants in the move process.
<input type="checkbox"/> Select checkbox if this function is present in your proposed solution. [If desired, you may click here to provide greater detail on how your proposed solution addresses this item.]	
Vouchers: Project Based Vouchers	Program management and alerting if rent burden exceeds 40% of income and distinguish between applicants and participants in the move process.
<input type="checkbox"/> Select checkbox if this function is present in your proposed solution. [If desired, you may click here to provide greater detail on how your proposed solution addresses this item.]	
Work Order	Creation and management of maintenance work orders.
<input type="checkbox"/> Select checkbox if this function is present in your proposed solution. [If desired, you may click here to provide greater detail on how your proposed solution addresses this item.]	

Work Order Mobile App	Mobile version of work orders. Active data connection not required.
<input type="checkbox"/> Select checkbox if this function is present in your proposed solution. [If desired, you may click here to provide greater detail on how your proposed solution addresses this item.]	

Desirable Service-operations Components:

Function	General Description
Pre-implementation Orientation	Provide a module-by-module introduction to specific subject-matter teams to give them an overarching summary of each module's function and how it interacts with others.
<input type="checkbox"/> Select checkbox if this function is present in your proposed solution. [If desired, you may click here to provide greater detail on how your proposed solution addresses this item.]	
Data Conversion	Production data for the most recent 5 years shall be converted for use by the proposed solution. All data prior to that shall be converted into a format that will allow for historic reporting and a data reporting tool to accomplish that task shall be included.
<input type="checkbox"/> Select checkbox if this function is present in your proposed solution. [If desired, you may click here to provide greater detail on how your proposed solution addresses this item.]	
Training (for Leadership)	Deliver a module-by-module immersion event to specific subject-matter leaders and Super Users (users who will become Subject-Matter-Experts).
<input type="checkbox"/> Select checkbox if this function is present in your proposed solution. [If desired, you may click here to provide greater detail on how your proposed solution addresses this item.]	
System Configuration	Utilize feedback from "Training (Leadership)" to prepare and pre-configure the solution according to their inputs.
<input type="checkbox"/> Select checkbox if this function is present in your proposed solution. [If desired, you may click here to provide greater detail on how your proposed solution addresses this item.]	
Acceptance Testing	Coordinate the acceptance testing and approval process for every module.
<input type="checkbox"/> Select checkbox if this function is present in your proposed solution. [If desired, you may click here to provide greater detail on how your proposed solution addresses this item.]	
Training (for Staff, at launch)	Establish a schedule of training for general staff, using the setup parameters established and solidified in "System Configuration" and "Acceptance Testing" above.
<input type="checkbox"/> Select checkbox if this function is present in your proposed solution. [If desired, you may click here to provide greater detail on how your proposed solution addresses this item.]	

Cutover and white-glove 120-day launch support	Coordinate cutover approach and provide immediate (2 business hours or less), “white glove” support to address all issues that present themselves for 120 days after launch.
<input type="checkbox"/> Select checkbox if this function is present in your proposed solution. [If desired, you may click here to provide greater detail on how your proposed solution addresses this item.]	
Ongoing Support and Help Desk Services	Ability to both email and call-in for product support. All inquiries shall be logged and trackable by both vendor and RHA. Vendor shall communicate available SLAs as part of their proposal.
<input type="checkbox"/> Select checkbox if this function is present in your proposed solution. [If desired, you may click here to provide greater detail on how your proposed solution addresses this item.]	
Ongoing Training	A strategy for providing periodic instructor-lead and/or pre-recorded online training, after launch.
<input type="checkbox"/> Select checkbox if this function is present in your proposed solution. [If desired, you may click here to provide greater detail on how your proposed solution addresses this item.]	
Custom Services	A strategy for quoting and delivering services that are outside of the bounds of being routine. In one example, (but not limited to): having vendor create a report (or other task) on behalf of RHA.
<input type="checkbox"/> Select checkbox if this function is present in your proposed solution. [If desired, you may click here to provide greater detail on how your proposed solution addresses this item.]	
Administration as a Service	The vendor acts as a systems administrator (creating, deleting, managing user accounts, and account access), following requests submitted by RHA individuals who are authorized to do so.
<input type="checkbox"/> Select checkbox if this function is present in your proposed solution. [If desired, you may click here to provide greater detail on how your proposed solution addresses this item.]	
Account Management	Vendor shall commit to weekly, 30-minute, Teams-based teleconferences to review account status, service requests, and other action items to support the business relationship.
<input type="checkbox"/> Select checkbox if this function is present in your proposed solution. [If desired, you may click here to provide greater detail on how your proposed solution addresses this item.]	
SaaS & Data Backup	Cloud hosted, accessed via Edge browser. Data backup methodology in place. Business Continuation/Recovery plan in place.
<input type="checkbox"/> Select checkbox if this function is present in your proposed solution. [If desired, you may click here to provide greater detail on how your proposed solution addresses this item.]	

System Updates	The system shall be kept current with regular updates to maintain compliance with federal mandates.
<input type="checkbox"/> Select checkbox if this function is present in your proposed solution. [If desired, you may click here to provide greater detail on how your proposed solution addresses this item.]	
Authentication federation to AMHA's AzureAD	Vendor shall federate with AMHA's Azure AD tenant to enforce user authentication using any/all available methods enforced by Azure AD.
<input type="checkbox"/> Select checkbox if this function is present in your proposed solution. [If desired, you may click here to provide greater detail on how your proposed solution addresses this item.]	

Commented [JL1]: We will need to get this information from Jason.

Desirable Financial Factors:

Function	General Description
Invoicing Timeliness	Invoices for products and services shall be delivered as PDF documents to Kelwer@allenmha.com no later than 10-days after final delivery. Invoices received later than 45 days after final delivery shall be subject to a Formal Challenge (see "Invoice Auditing/Challenging" item below).
<input type="checkbox"/> Select checkbox if this function is present in your proposed solution. [If desired, you may click here to provide greater detail on how your proposed solution addresses this item.]	
Invoicing Detail	Invoices shall be specific as to the product and/or service for which payment is sought. Line-item detail shall be included.
<input type="checkbox"/> Select checkbox if this function is present in your proposed solution. [If desired, you may click here to provide greater detail on how your proposed solution addresses this item.]	
Invoice Payment	NET30
<input type="checkbox"/> Select checkbox if this function is present in your proposed solution. [If desired, you may click here to provide greater detail on how your proposed solution addresses this item.]	
Invoice Auditing/Challenging	Should an invoice fail to meet AMHA's payment standards (based on commonly understood Generally Acceptable Accounting Practices), AMHA shall be authorized to issue a formal Request for Review with the vendor during which time the invoice payment terms shall be considered "frozen" until mutually resolved. The vendors assigned Account Manager shall be AMHA's point-of-contact for initiating an invoice review.

☐ Select checkbox if this function is present in your proposed solution.
[If desired, you may click [here](#) to provide greater detail on how your proposed solution addresses this item.]

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REFERENCES

Please provide at least three (but no more than 5) previous Public Housing customers who your firm has successfully migrated from the Tenmast WinTen2+ ecosystem to the solution that you are proposing; with the knowledge that they may be contacted as a reference.

REFERENCE 1

Organization Name	Contact Name	Contact’s Title	Contact Method
Click or tap here to enter Organization Name.	Click or tap here to enter Contact Name.	Click or tap here to enter Contact Title.	Click or tap here to enter email and/or phone number.
Click or tap here to describe the work that you performed for this reference.			

REFERENCE 2

Organization Name	Contact Name	Contact’s Title	Contact Method
Click or tap here to enter Organization Name.	Click or tap here to enter Contact Name.	Click or tap here to enter Contact Title.	Click or tap here to enter email and/or phone number.
Click or tap here to describe the work that you performed for this reference.			

REFERENCE 3

Organization Name	Contact Name	Contact’s Title	Contact Method
Click or tap here to enter Organization Name.	Click or tap here to enter Contact Name.	Click or tap here to enter Contact Title.	Click or tap here to enter email and/or phone number.
Click or tap here to describe the work that you performed for this reference.			

(Optional) REFERENCE 4

Organization Name	Contact Name	Contact’s Title	Contact Method
Click or tap here to enter Organization Name.	Click or tap here to enter Contact Name.	Click or tap here to enter Contact Title.	Click or tap here to enter email and/or phone number.
Click or tap here to describe the work that you performed for this reference.			

(Optional) REFERENCE 5

Organization Name	Contact Name	Contact’s Title	Contact Method
Click or tap here to enter Organization Name.	Click or tap here to enter Contact Name.	Click or tap here to enter Contact Title.	Click or tap here to enter email and/or phone number.
Click or tap here to describe the work that you performed for this reference.			

QUALIFICATIONS

Please identify no fewer than two (2) nor more than seven (7) persons who will most likely be assigned to the initiative/account, their role, and their level of experience in successfully migrating a client from the Tenmast WinTen2+ ecosystem to the solution that you are proposing.

Name	Title	Role
Click or tap here to enter assignee's name.	Account Manager	Click or tap here to enter assignee's role.
Click or tap here to describe the experience that this person brings in regard to migrating a client from the Tenmast WinTen2+ ecosystem to the solution that you are proposing.		

Name	Title	Role
Click or tap here to enter assignee's name.	Project Manager	Click or tap here to enter assignee's role.
Click or tap here to describe the experience that this person brings in regard to migrating a client from the Tenmast WinTen2+ ecosystem to the solution that you are proposing.		

Name	Title	Role
Click or tap here to enter assignee's name.	Click or tap here to enter assignee's title.	Click or tap here to enter assignee's role.
Click or tap here to describe the experience that this person brings in regard to migrating a client from the Tenmast WinTen2+ ecosystem to the solution that you are proposing.		

Name	Title	Role
Click or tap here to enter assignee's name.	Click or tap here to enter assignee's title.	Click or tap here to enter assignee's role.
Click or tap here to describe the experience that this person brings in regard to migrating a client from the Tenmast WinTen2+ ecosystem to the solution that you are proposing.		

Name	Title	Role
Click or tap here to enter assignee's name.	Click or tap here to enter assignee's title.	Click or tap here to enter assignee's role.
Click or tap here to describe the experience that this person brings in regard to migrating a client from the Tenmast WinTen2+ ecosystem to the solution that you are proposing.		

Name	Title	Role
Click or tap here to enter assignee's name.	Click or tap here to enter assignee's title.	Click or tap here to enter assignee's role.
Click or tap here to describe the experience that this person brings in regard to migrating a client from the Tenmast WinTen2+ ecosystem to the solution that you are proposing.		

Name	Title	Role
Click or tap here to enter assignee's name.	Click or tap here to enter assignee's title.	Click or tap here to enter assignee's role.
Click or tap here to describe the experience that this person brings in regard to migrating a client from the Tenmast WinTen2+ ecosystem to the solution that you are proposing.		

ENGAGEMENT and LOGISTICS

Use the expandable field below to describe your approach to handling the logistics of this task. **NOTE:** Every item that

you have marked (with “☒”) in the section titled "DESIRED CAPABILITIES” should be comprehended in your response.

Click or tap here to enter text.

FINANCIALS, TIMELINE, and DEPENDENCIES

Use the expandable fields below to convey a full and complete financial quote for the services noted in your response to this RFP. **NOTE:** Every item that you have marked (with “☑”) in the section titled "DESIRED CAPABILITIES” should be comprehended in your response. General guidance:

- 5-year contract term, showing costs for each year
- Please separate one-time costs from recurring costs

FINANCIALS (Product-only)

Click or tap here to enter text.

FINANCIALS (Conversion/Migration - Technical)

Click or tap here to enter text.

FINANCIALS (Training and support on new system)

Click or tap here to enter text.

FINANCIALS (Other, if not comprehended above)

Click or tap here to enter text.

FINANCIALS (Summarize below)

Click or tap here to enter text.

Use the expandable field below to convey any dependencies.

Click or tap here to enter text.

Use the expandable field below to convey a timeline to fully deliver the services referenced in this RFP. **NOTE:** Every item that you have marked (with “☑”) in the section titled "DESIRED CAPABILITIES” should be comprehended in your response.

Click or tap here to enter text.

Complete the table below to show hourly rates for custom/on-demand/professional services that are outside of the scope of acquisition, implementation, and initial launch.

Task	Cost (\$/Hr or \$/Yr)	Details (if any)
Custom Report Writing	Cost	Click or tap here to enter text.
Custom Training	Cost	Click or tap here to enter text.
Dedicated Support Representative	Cost	Click or tap here to enter text.

Use the expandable field below to convey support Service Level Agreements (both those that are “base/included” as well as any enhanced SLAs that are available.

[Click or tap here to enter text.](#)

Use the expandable field below to convey any additional services that you feel should be considered, even if not specifically called-out in this RFP.

[Click or tap here to enter text.](#)

Optional Additions

Please use the expandable space below to convey any other information (**EXCLUDING** marketing materials) that is DIRECTLY related to this RFP. **Please limit yourself to a single page.**

[Click or tap here to enter text.](#)

If you wish to attach additional information (such as marketing materials, etc), you may do so as a separate single attachment. Do so with the knowledge that such attachments will have no impact on how responses are evaluated.

END OF ATTACHMENT A

Forms Follow

