# Request for Proposals

# Software Services & Fee Accounting

# Stanford, KY Housing Authority

**Issue Date: January 25, 2022**

**Response Date: <u>10:00 AM on Tuesday, March 15, 2022</u>**

**Housing Authority of Stanford**
**100 Lacy Street**
**Stanford, KY 40484**
**859-236-6116**

**Contact: Tim Kitts**
**Executive Director**
**stanfordhousingauthority@gmail.com**
**859-236-6116**

## INTRODUCTION

The Housing Authority of Stanford (SHA) in Stanford, Kentucky is seeking to upgrade its business software to increase efficiency and enable greater functionality. SHA is looking to build a diversified portfolio to consist of Section 8 units, Public Housing units, and Mixed Financed Affordable units. Currently, SHA only operates public housing units and is currently managing another public housing development, the Housing Authority of Stanford. SHA has created this Request for Proposal (RFP) to be completed by all interested vendors and will review both technical and cost considerations for each proposal.

The SHA is a progressive, future-oriented housing authority that wants to utilize all its resources and capabilities to provide the best quality affordable housing for Stanford's low-income citizens. Services provided by the Software Company would include the following among other services:

Submit an original hard copy of the completed proposal documents in a sealed envelope and marked to:

> Mr. Tim Kitts, Executive Director
> Housing Authority of Stanford
> P.O. Box
> Stanford, KY 40484
> 859-236-6116
> stanfordhousingauthority@gmail.com

Faxed and/or Emailed copies of responses are not acceptable. Paper submissions are required.

**The response shall be due no later than <u>10:00 AM on Tuesday, March 15, 2022</u>.**

## BACKGROUND

The Housing Authority of Stanford (SHA) is a Public Housing Agency. The Authority has 50 units of Low Rent Public Housing and manages the Capital Fund Program.

## CURRENT COMPUTER SYSTEMS

Currently the operation's core software is run on an Intel Core i5-6600 Quad Core 3.9Ghz Turbo. SHA's existing hardware and software configurations consist of:

**Hardware**
Server -  8 GB DDR4 system memory. 2 x 1TB Serial ATA 100 hard drive 7200RPM Integrated Giga-bit network
Clients -  Personal computers with Intel i5. 1TB hard drive

**Software**
Personal Computers - Microsoft Windows 10 Pro

Server OS -               Microsoft Windows 10 Pro
Housing Application – Lindsey from MRI
Fee Accounting – Lindsey Accounting

RFP CONTACT:

| Contact Person | Tim Kitts<br>Telephone: 859-236-6116<br>Email: stanfordhousingauthority@gmail.com |
|---|---|
| Pre-Proposal Conference | No Pre-bid conference will be held for this Request for Proposal. Vendor inquiries must be sent to the email listed above. |
| How to fully respond to this RFP | By submitting a Proposal Submittal as directed within the RFP Document. |
| Submission of Proposal Deadline | The proposal must be received in-hand and time-stamped by SHA no later than Tuesday, March 15, 2022, at 10:00 AM<br><br>Housing Authority of Stanford<br>100 Lacy Street<br>Stanford, KY 40484 |

All questions must be submitted in writing five (5) business days prior to the Submission of Proposal deadline set forth above. Questions and requests for documents pertaining to this solicitation shall be addressed to the contact listed above.

## **APPLICABILITY**

By submitting a bid, the bidder is agreeing to abide by all terms and conditions listed herein, including those terms and conditions within HUD Handbook 7460.8 REV 2, Procurement Handbook for Public Housing Agencies, dated 2/2007, and HUD Table 5.1, Mandatory Contract Clauses for Small Purchases Other Than Construction and attached, and HUD 5370EZ, Davis Bacon or HUD Wage Decision.

## **SCOPE OF WORK**

It is management's objective to upgrade all Authority property management and financial functions into the new system, thereby minimizing the existence of outdated systems and

eliminating most or all the standalone systems and databases. The system needs to support the needs of the entire agency and provide data to support decision-making as the Authority moves to a new operational model.

High priority features of the proposed software solution:

- Cloud-based service that complies with Federal and State Privacy Protection Regulations
- Provides access to account self-service for applicants, tenants, and employees.
- Integration with an electronic document management system.
- Robust 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.
- HUD reporting
- Tax Reporting – Federal and State
- Web based access to account self-service for our customers, i.e., Tenants and Prospective Tenants.
- The ability to retain the existing detailed log of tenant / client interactions. The conversion / import of these should be included in the proposal.
- Capability of adding customizable fields for Housing Authority use
- Capability of conducting business remotely.

SHA wishes to select application software for the following applications areas:

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|---|---|
| • Accounts Payable | • Accounts Receivable |
| • Budget Control | • Budget Preparation and Forecasting |
| • Cash Management | • Client Management & Services (Applications, Waitlist, Certifications, Social Services, Case Management) |
| • Contract Management | • Executive Dashboard / Board Reports |
| • FDS Processing and Reporting | • Fee Accounting |
| • Fixed Assets | • General Ledger |
| • Grant Management | • Housing & Property Inspections with mobile application |
| • HUD Program Reporting and Compliance | • Job Costing |
| • Legal and Collections Management | • Paper/Physical Document Management System |
| • Payroll and Human Resources | • PHAS Reporting |
| • Property Management (Leases, Unit Management, Billing, Inspections & Maintenance) | • Purchasing / Procurement |
| • Utility Billing/Tracking (with mobile application) | • Work Order System with mobile application |

**Other Desired Features**

- Website Management
- Capabilities for integration with online banking applications, and facilitate direct deposit of Housing Assistance Payments (HAP) and Payroll Employee Wages Integrated Document Imaging System
- Document sign – One signature for several forms
- Online Housing Application for applicants
- Online Landlord access to account information
- Online Resident/Participant Portal
- Online Employee access to payroll information
- Ability to track community service
- Ability to send information/paperwork to tenants and landlords by e-mail and/or other electronic means

The vendor is to provide a proposal that encompasses the following:
1. Applications software features and functions
2. Systems software technical configuration
3. Hardware technical specifications
4. Design/development of modifications to application software, if required
5. Implementation assistance / Training
6. On-going support

**Estimated costs associated with each of the above items <u>must</u> be included in the proposal.**

## <u>PROPOSAL FORMAT</u>

All proposals should follow the format provided below. 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 <u>require</u> the proposal be a hardcopy.

- An individual who is authorized is 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 90 days will be required).

- The vendor response should include the following information in the order indicated:

1. **Introduction / Experience**
2. **Software Features / Reporting Capabilities**
3. **Fee Accounting Service and Support**
4. **Customer Service and Support**
5. **Cost Effectiveness**
6. **References**

## EVALUATION CRITERIA

Proposals shall be evaluated only on the criteria stated in this RFP in accordance with the Competitive Proposal procurement method. All proposals will be rated on a scale of 0 to 100 points, Vendors must provide a response to each of the Rating Criteria listed in this section: Experience and Support, Software Features, Software & Data Conversion, Reporting Capabilities, and Cost Effectiveness. The selection of software will be based on the highest overall score assigned by the software selection committee and will not solely be determined by price alone. The top 3 vendors will be invited to demonstrate the software solution to our staff.

**Software Features: 30 Points**
Features that satisfy the HA's wide range of operations/services. Accommodate the agencies high priority features and modules, ease of use and intuitive design of user interface, strong security and strong data protection, in depth training, data processing speed and automation of workflow/processes.

**Experience and Support: 20 Points**
Demonstrated experience complying with HUD requirement and PHA operational requirements for PHA's of a similar size and complexity. Quality and availability of support services.

**Software & Data Conversion: 10 Points**
Demonstrated ability to convert data from Lindsey system to the new software system. Availability of the conversion time frame and duration of conversion process. Ability to convert all data from existing system. Training and customization support.

**Reporting Capabilities: 10 Points**
Demonstrated ability to provide detailed and highly customizable reports/letters/forms with integrated database fields. Letter tracking and bar code support that integrates with software system.

**Cost Effectiveness: 30 Points**
Total cost of ownership for the full software lifecycle including fees for: Fee Accounting, conversion, training, software licensing, maintenance contracts, updates contracts, support contracts and conversion related custom programming services, regulatory compliance, associated 3rd party hardware and software.