



REQUEST FOR PROPOSAL Software

**Housing Authority of Fulton County**

Solicitation# 2023-0502

Due Date: May 22, 2023 at 04:00 PM EST

From the date of issue to the Public until after the **Notice of Award** has been officially

issued by HAFC, Prospective Service Providers shall make all contact with the

HAFC through Ms. Z. Brown, 4373 Wendell Drive, Atlanta, Georgia 30336,

email: [**RFP@HAFC.org**](mailto:RFP@HAFC.org)**.** If it is deemed necessary for contact to be made with any other

party within HAFC, Ms. Brown shall arrangements contact to take place.

**Providers who attempt to make direct contact with HAFC personnel or appointed**

**officials during the solicitation period may be disqualified from participation or**

**consideration for award.**

**Prepared for and Presented to: Attention**: Ms. Z. Brown

Housing Authority of Fulton County 4273 Wendell Dr. SW

Atlanta, Georgia 30336-1632

**Phone**: 404-588-4950

**Email**: [RFP@hafc.org](mailto:RFP@hafc.org)

This proposal includes data that shall not be disclosed outside the Government and shall not be duplicated, used, or disclosed in whole or in part for any purpose other than to evaluate this proposal. If, however, a contract is awarded to this offeror as a result of or in connection with the submission of this data, the Government shall have the right to duplicate, use or disclose the data to the extent provided in the resulting contract. This restriction does not limit the Government’s right to use information contained in this data if it is obtained from another source without restriction. The data subject to this restriction are contained on the pages marked with the legend “Use or disclosures of data contained on this sheet is subject to the restriction on the title page of this proposal.”

**PROJECT OVERVIEW**

**Date Issued:** May 8, 2023

**Due Date:** May 22,2023

**Services Being Procured:**

**The Housing Authority of Fulton County is seeking a vendor to provide Enterprise Resource Planning Public Housing Software.**

**Pre-bid:** The Housing Authority of Fulton County (HAFC) will not hold a pre-bid conference. Vendor inquiries may be emailed to Ms. Zakiya Brown at zbrown.hafc.org. until Tuesday May 16, 2023 at 4:00 p.m.

**Proposed Due Date:** Monday, May 22, 2023 4:00 p.m.

**Proposals may be emailed or mailed to the following address:**

Fulton County Housing Authority

Solicitation # 2023-0502

4273 Wendell Drive

Atlanta, Ga 30336

**Attn: Ms. Z. Brown**

**Point of Contact: Zakiya Brown**

Office Manager

[RFP@hafc.org](mailto:RFP@hafc.org)

Phone: 470/650-1966

**Schedule of Activities**

This timeline reflects an optimal conversion plan for HAFC. It is anticipated that an actual timetable will be based upon both Vendor and HAFC conversion constraints. If these dates must be revised, everyone will be apprised. If possible, tasks beyond the RFP submission deadline may be accomplished sooner than indicated in the timetable.

|  |  |
| --- | --- |
| Official release of RFP | 05/08/023 |
| Last day for Vendor Inquiries | 05/16/2023 |
| RFP Submission Deadline | 05/22/2023 |
| Review of submitted RFPs | 05/23/23-05/26/23. |
| Selection of Top 3 Candidates | 05/30/23 |
| Interviews/Demonstrations | 05/31-6/08/23 |
| Board Approval of Vendor | 06/15/23 |
| Contract Negotiations | 06/20/23-6/30/23 |
| Develop Installation/Conversion Plan | Complete by 07/07/23. |
| Installation/User Training | 07/17/2023- |
| Parallel Operations | complete by 09/28/23 |
| Conversion to New System | 09/29/23 |

## Table of Contents



**I. Introduction**

Housing Authority of Fulton County (HAFC) in Atlanta, Georgia is interested in

upgrading its business software to increase efficiency and enable greater functionality.

HAFC 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.

Vendors RFP submitted using the following process options. Hand delivered at

HAFC 4273 Wendell DR , Atlanta, GA 30336, Monday thru Thursday 9:00 A.M.

until 5:00 P.M., Friday 8:00AM-12:00 PM. or by e-mailing [RFP@hafc.org](mailto:RFP@hafc.org).

Please direct all questions regarding this RFP to Z. Brown by e-mail to [RFP@hafc.org](mailto:RFP@hafc.org)

NOTE: If you intend to respond to this RFP, please confirm receipt of the RFP via e-mail to

[RFP@hafc.org](mailto:RFP@hafc.org) or complete a Bidder Information Form to ensure proper distribution of any

addenda or answers to vendor questions. Failure to confirm receipt of this document will not

disqualify any vendor from the bidding process. However, HAFC will not be responsible for

sending updated information to those who do not confirm receipt of the RFP.

HAFC reserves the right to reject any proposals and to waive any informalities in the proposal

received whenever the Authority determines that such rejection or waiver is in its best interest.

The Authority also reserves the right to reject proposals from any firm who has previously

failed to perform properly and/or complete work or contracts in a timely manner.





**IV. Description of Current Environment**

**A. The Authority’s Housing Programs**

HAFC is mainly a Housing Choice Voucher Program with 970 HCV Vouchers, 930 Portability Vouchers as well as a 232 Project based vouchers.

**B. Current Software**

HAFC currently uses software from Ten Mast for all its major housing authority and accounting functions. This software performs all of HAFC’s primary functions such as Occupancy/Tenancy, Tenant Accounts Receivable, General Ledger, Work Order, Inspections, Wait List, Homeowners, PIC and PHAS.

**C. Workstations**

Workstations have been recently updated to Dell Machines operating with Windows 10 Professional.

**D. Users**

HAFC currently has 60 active users operating from 2 sites and the Central Office.

**E. Printers**

HAFC currently has HP Laser Jets using Window’s Network File and Print Service. Options to provide for Laser check printing and signing should also be a part of this proposal.

**V. Proposed Software Functional Requirements/Format**

* 1. **Executive Summary**

The Executive Summary should include:

### Non-Technical Overview of the Business

A brief non-technical overview of the Vendor’s business including the range of products and services offered.

### Range of Products and Services Offered

### How Our Products and Services Meet HAFCs Needs

Vendors should provide information reflecting how and why vendor’s products and services meet HAFCs needs.

* 1. **COMPANY PROFILE**

The Company Profile should include the following:

### History of the Company

History of the company: both in general and specifically related to housing software

### Number of Employees

Number of employees: in sales, development, support, training, and management

### Location

Location: indicate any and all cities in which your support offices are located

### Relationship to HUD

Relationship to HUD: include information about the company’s knowledge of HUD regulations and method for keeping software current.

* 1. **CUSTOMER REFERENCES**

Customer References

Customer References should include a listing of at least five (5) current Housing Authority customers. Any Housing Authority listed may be contacted by HAFC, but special attention will be paid to those which are comparable in size, function, and location. For each reference, include the following information:

Name of technical person responsible for software maintenance and operation Position at the housing authority

Telephone number Fax Number Address

### Customer Reference #1

|  |  |
| --- | --- |
| Technical Person Name: |  |
| Position at the Housing Authority: |  |
| Telephone number: |  |
| Fax Number: |  |
| Address: |  |

* 1. **CORE PRODUCT DESCRIPTION**

Core Product Description

### Software Description

Software Description: Provide a list of all software components, and any plan for expansion/future release dates.

### List of All Software Components

V. Proposed Software Functional Requirements

This section lists the minimum functional necessities, which should be reflected in any software proposal. In the list below, the listed functions are those that are intrinsic our everyday work. If the proposed software does not meet any of these requirements, then any proposal should include a detailed description of how this functional need would be met otherwise. The lack of a required functionality in any software proposal would be sufficient to disqualify that proposal.

Proposed Software MUST meet the following requirements:

### Tenant Processing

1. Tenant Processing
   1. Waiting List Transactions
      1. Add/drop/edit
      2. Offer a unit/remove an offer
   2. Move-Ins
   3. Re-exams
      1. Annual
      2. Interim
      3. Historical adjustment
      4. Void 50058s
      5. Re-exam searching
   4. Issue voucher with 50058
   5. Section 8 Portability
      1. Port-in
      2. Port-out
   6. Generate detailed Demographic Data report
   7. HAP Register Report
      1. Track owners, payments, usage, etc.
   8. Low-Rent PHAS Indicators/Reports
   9. Low-Rent/Section 8 New Construction Unit Reports
   10. Create Voucher Status report
   11. PIC reporting/error checking
   12. Must generate:
       1. 50058 & 50059
       2. 50065
       3. 52670 voucher
       4. 1944-8
       5. 1944-29 voucher

### Accounts Payable

1. Accounts Payable
   1. Create Invoices
      1. Past, present and future invoices for payment
   2. Create negative invoices
   3. Generate Section 8 Invoices
   4. Print checks, both Section 8 and regular payables
   5. Reconcile Bank Account
   6. Generate and Print 1099s
      1. Create 1099 and magnetic media
   7. HAP payments
   8. ACH transactions and direct deposits
   9. Reports to include:
      1. Check register.
      2. Invoice listing/current and past invoices
      3. Vendor transaction listing
      4. Allocated Expense Report
   10. Invoice listing/current and past invoices
   11. Vendor transaction listing
       1. Vendor list by category
       2. Vendor hold code
       3. Vendor W9 Listing Vendor 1099 Listing
       4. Vendor Total Listing
   12. MBE/Non-MBE (Minority Business Enterprise)
   13. Report Opening Invoice Listing
   14. Paid Invoice Listing
   15. Hold Code
   16. Aged Invoice Listing
   17. Cash Requirement
   18. Check Listing
   19. Accrued Invoice
   20. Listing (unpaid)
   21. Outstanding Payable
   22. Report Account Distribution
   23. Pre-Check Listing
   24. Posting Exception

### Accounts Receivable

1. Accounts Receivable
   1. For public housing and Section 8
   2. Cash receipts
   3. Audit trail report
   4. Collection loss query
   5. Delinquency report
   6. Reprint reports, regardless of closing status
   7. Must include transactions such as:
      1. Rent charges
      2. Security deposits
      3. Apply open credits
      4. Collection loss creation
      5. Collection loss credits
      6. Credit unearned rent
      7. Payments
      8. Reversals and voids
      9. Recurring charges
      10. Recurring credits
      11. Apply late charges
      12. Checks to tenants with credit balances
      13. Void check to tenant
      14. Generate statements
      15. Prepare HUD 52295
      16. Track HAP Payments by Housing Authority, Landlord and Tenant
      17. Track Admin fees by Housing Authority, Landlord and Tenant
      18. A/R monthly balance reports.

### Work Orders

1. Work Orders
   1. Meet HUD required listings for PHAS reporting
   2. Include “notes” sections for tracking purposes
   3. Ability to document requested repairs, completed repairs, pertinent tenant information and other general requirements
   4. Tie-in to Accounts Receivable for posting purposes
   5. Tie-in to Inventory and Purchase Orders
   6. Generate preventative maintenance
   7. Track individual workloads/schedules
   8. Set-up work codes for processing
   9. Track pets in units for maintenance crew
   10. Document smoke detector maintenance
   11. Reports to include:
       1. Worker listing/pay scale
       2. Summary of employee workload/work completed
       3. Monthly analysis of completed/remaining work orders

### 

### Inspections

1. Inspections
   1. System must handle low-rent and HQS inspections
   2. Upload to main system
      1. Completed inspections
      2. Inspection scheduling
   3. Generate reports automatically
   4. Handheld inspection system is desired
   5. Instantly schedule re-inspections
   6. Generate inspection (52580) reports
   7. Allow inspector to setup predefined repairs
   8. Provides complete inspection history

### Security

1. Security
   1. Establish security by individual user or groups
   2. Read, create, edit and delete options
   3. Add/remove individual users
   4. Change clearance levels
   5. Restrict access to certain files/systems
   6. Feature group and individual levels

### Accounting/Financial

1. Accounting/Financial
   1. General Ledger
      1. Use standard HUD chart of accounts
      2. Track HOPE IV grants
      3. Recurring Journal Entries
      4. Allocation Tables
      5. Interactive with Other Programs
      6. General Ledger
      7. Analysis of Working Capital
      8. Balance Sheet
      9. Chart of Account Listing
      10. Bank Reconciliation
      11. Generic Code
      12. HUD 52267 / PILOT
      13. HUD 52681 / Voucher for Payment AC
      14. Development Cost Statement with Budget comparison
      15. Statement of Initial Operating Period
      16. Statement of Land, Structures & Equipment
      17. Statement of Operating Receipts and Expenditures, with PUM and Budget comparison
      18. Statement of CFP Cost with Budget comparison
      19. Automatic closing of operating accounts to Unreserved Surplus
      20. HUD-2599 Statement of Operating Receipts and Expenditures
      21. HUD-2595 Balance Sheet General

Trial Balance 1 and 2

Trail Balance with Adjustment Lines Trail Balance –Interfund

Detailed General Ledger Journal Report

Special Report Cash Flow Report

Trail Balance Pivot Fund Compare

Setup

Account Listing by Account Type Code Account Listing by HUD Account Code Account Listing by FDS Account Code Account Listing by report Group

Budget Report

Budget Comparison

Annual Budget Comparison Report

Current/Year to Date Budget Comparison report

* + 1. FDS Reporting Per HUD Standards
    2. Payroll Module
       1. Paycheck stubs
       2. Employee self-portal
       3. Generate W-2s.
       4. File Federal and State Quarterly and Annual Statements
       5. Ability to reprint check stubs.

### Other Areas

1. Other Areas
   1. Fixed Assets
      1. Track materials by:
2. Asset description
3. Manufacturers
4. Serial numbers
5. Asset type
6. Physical location
   * 1. Transactions such as:
7. purchase date
8. vendors
9. check number
10. costs
    1. Bar code readers
    2. Allocation tables
    3. Month-end and Fiscal year-end closing
    4. Real-time posting
    5. Balance sheets
    6. Tax tables
    7. Time sheets
    8. Rent Reasonable
    9. Inventory
       1. Create items
       2. Create warehouses
       3. Indicate/edit quantity on hand
       4. Indicate/edit location
       5. Edit reorder quantity
       6. Edit reorder point
       7. Edit reorder lead time
       8. Edit average unit cost
       9. Setup vendors
       10. Edit location/aisle in warehouses
       11. Inventory transfer
       12. Purchase orders
       13. Provide inventory adjustment for General Ledger

### Printing/Reports

1. Printing/Reports
   1. Ability to print documents, letters and reports to variety of printers
   2. Print checks
   3. Create custom reports
   4. Export data to external reporting/data collection tools such as:
      1. Excel
      2. PDF
      3. JPEG
      4. HTML
   5. Create new letters
   6. Edit existing letters
   7. Sort/filter by location, dates, family, labels & financials
   8. Letter templates
   9. Generate merge letters
   10. Create standard HUD forms such as:
       1. 50058
       2. 50059
       3. 52670 voucher
       4. 1944-8
       5. 1944-29 voucher
       6. 1951-29
       7. 52295
       8. 51234
       9. 52683
       10. 51228
       11. 52295
       12. 52267
       13. 52681
       14. 52595
       15. 52599
       16. 1099
       17. Inspection Checklist 52580
       18. HAP Contracts 52641
       19. Request for Tenancy Approval 52517
       20. Vouchers 52646
       21. Ability to add new HUD forms.
   11. Link to HUD systems
       1. PIC
       2. TRACS
       3. REAC
       4. USDA
       5. MINC
       6. FMR tables
       7. Income limit tables
   12. Contract Maintenance
   13. Standard Forms
   14. Register for Proposals
2. Register for Contracts
3. Payment Schedules
4. Vendor Registration
5. Renewal Schedules

### Plan for Expansion/Future Release Dates, if any

### Hardware Requirements

Hardware requirements: describe minimum hardware requirements to run both server and client applications (if applicable), such as processor type and speed, RAM, and hard disk space. If any modules, such as handheld inspections, require additional devices or hardware, include these. If there are known compatibility issues with any specific platform or device, list those also.

### Operating System Requirements

Operating System requirements: description should include OS compatibility, including specific OS version information. Include a description of methods used to ensure that the product remains compatible with the OS after OS patch and hot-fix releases.

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### Network Requirements

Network Requirements: List all network requirements necessary for full functionality of the product. Include a description of any and all necessary protocols, bandwidth requirements, levels of connectivity (i.e. LAN, Internet, direct-dial, etc.) and any other relevant information.

### Any and All Necessary Protocols

### Bandwidth Requirements

### Levels of Connectivity

### Other Relevant Information, if any

* 1. **NOTABLE FEATURES**

Notable Features

This section should include any unique product features which the Vendor would like to describe.

* 1. **INSTALLATION AND CONVERSION PROCESS PROPOSAL**

Installation and Conversion Process Proposal

### Installation Process

Installation Process: Provide an enumerated plan for the installation process. Specify tasks to be performed and by whom.

### Installation Verification

Installation Verification: Provide an enumerated plan for verifying full functionality of the product.

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### Data Conversion Process

Data Conversion Process: Provide an enumerated plan for the conversion of necessary data from the current Wright system, as outlined in Section VI, “Data Conversion Requirements”.

### Data Conversion Verification

Data Conversion Verification: Provide an enumerated plan for verifying correct data conversion.

* 1. **TRAINING PROPOSAL**

Training Proposal

### Initial Training

Initial Training: Describe any and all training to be included as part of the proposed installation package, both for the users and for the system administrator. Include information on the training method, amount of training time, and at what point during the installation process the training will occur.

### Ongoing Training

Ongoing Training: Describe any ongoing training programs the Vendor offers that are not included in the initial training.

* 1. **MAINTENANCE PROPOSAL**

Maintenance Proposal

This section should include detailed descriptions of all maintenance plans offered by the vendor. Descriptions should include:

### Support Hours

Support Hours (emergency and non-emergency)

### Types of Support

Types of Support (phone, e-mail, on-site, etc.)

### Guaranteed Response Times

Guaranteed Response Times (emergency and non-emergency)

### List of Issues Supported

List of Issues Supported

### List of Issues Specifically Excluded from Support

List of Issues Specifically Excluded from Support

### Maintenance Services Included

Maintenance Services Included (software patches, HUD regulation changes, software customization, consulting, other)