

# **Linn-Benton Housing Authority**

## **Housing/Tenant Management and Accounting SaaS Solution**

**RFP NUMBER: 02-2023**

**CLOSING DATE: April 25, 2023 AT 4:00 PM PST (LOCAL TIME)**

**Issued by:**

**Linn-Benton Housing Authority  
Administrative Services Department  
1250 Queen Ave. SE  
Albany, OR 97322**

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## Introduction

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Linn-Benton Housing Authority, hereinafter referred to as “LBHA”, is seeking proposals from qualified Proposers providing Software as a Service (SaaS) solutions that meet the housing management, tenant management, and accounting needs of LBHA. The selected SaaS solution shall enable LBHA to effectively and efficiently run all aspects of housing and tenant management and accounting functions. The software must conform to all requirements of project-based accounting, budgeting, and management, and to all requirements of the United States Housing and Urban Development (HUD) Section 8 programs, State of Oregon Housing and Community Services (OHCS) (including Low Income Housing Tax Credits [LIHTC] and local programs), and Generally Accepted Accounting Principles (GAAP).

Proposals will be received until, but **not after 4:00 p.m. (local time), April 25, 2023. Proposals will be accepted electronically through email ONLY to [jeffk@l-bha.org](mailto:jeffk@l-bha.org).** LBHA is not responsible for delayed or late delivery of proposals. **NO LATE PROPOSALS WILL BE ACCEPTED.**

The RFP may be obtained by sending an email request or by downloading it from LBHA’s website, which can be found at [www.l-bha.org/rfp-documents](http://www.l-bha.org/rfp-documents). **Be sure to download both the RFP and the related Excel Spreadsheet**, which is explained in **Section 2 – Proposal Response Guidelines**. Any addenda, clarifications, and other notifications will be available on LBHA’s website. It is recommended that interested Proposers check the website regularly. Addenda and any other notifications will also be emailed to known interested Proposers.

It is the express policy of LBHA that no person shall be excluded from participation in, be denied the benefits of, or be otherwise subjected to discrimination under any program or activity on the grounds of race, religion, color, national origin, sex, marital status, familial status or domestic partnership, age, mental or physical disability, sexual orientation, gender identity or source of income as provided by Title VI of the Civil Rights Act of 1964, and other federal nondiscrimination laws. Proposer agrees to comply with all applicable requirements of federal, state, and local civil rights and rehabilitation statutes, rules, and regulations if awarded a contract by LBHA.

In all solicitations, either by competitive bidding or negotiation made by the successful Proposer for work to be performed under a subcontract, including procurements of materials or leases of equipment, each potential subcontractor or supplier shall be notified by the successful Proposer of the Proposer’s obligations under this contract and Title VI of the Civil Rights Act of 1964 and other federal nondiscrimination laws.

LBHA is an Equal Employment Opportunity employer. LBHA operates and maintains Americans with Disabilities Act compliant facilities. Reasonable accommodations are available upon request.

Questions regarding LBHA’s RFP process may be addressed to:

Jeff Knox, CFO and IT Specialist  
Email: [jeffk@l-bha.org](mailto:jeffk@l-bha.org)

FIRST DATE OF SOLICITATION: **March 28, 2023**

REQUEST FOR PROPOSAL NUMBER: **02-2023**

REQUEST FOR PROPOSAL CLOSING: **April 25, 2023 at 4:00 PM PST (Local Time)**

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## Section 1: Background

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**About LBHA:**

Linn-Benton Housing Authority (LBHA) was created by joint resolution of the Linn and Benton Counties in 1979 to address the shortage of affordable housing in our communities. LBHA is a regional public agency organized as a public corporation under ORS Chapter 456. LBHA operates under state law administering its federal housing programs in compliance with federal regulations. LBHA is governed by a nine-member Board of Commissioners that is responsible for establishing policy and generally overseeing the operation of the Housing Authority. LBHA has approximately 30 employees and three operating departments. LBHA provides assistance to more than 3,100 families today.

Through its services, LBHA aims to provide fair, sustainable, quality housing in diverse neighborhoods throughout the Linn and Benton Counties and offers a stable foundation for low-income families to pursue economic opportunities to become self-sufficient and improve their quality of life.

LBHA administers multiple housing and program types, including:

<b>Housing and Program Types</b>	
Section 8 programs, including Housing Choice Vouchers, Mainstream, Emergency Housing Vouchers, Moderate Rehabilitation, Non-Elderly Disabled, VASH, Tenant Protection, Project-Based Vouchers, and Family Self-Sufficiency	2,915
LIHTC	88
Other owned and managed properties, including Partnerships	155
<b>Total Vouchers/Units</b>	<b>3,158</b>

LBHA currently uses Housing Management Software (HMS), owned and administered by MRI Software, for housing/tenant management and accounting. LBHA self-hosts the software on a local server. Back-up is provided off-site by cloud-based solutions. All workstations include Windows 11 Pro 64-bit with Microsoft Office 365, using Edge and Chrome browsers. LBHA's mobile devices primarily include iPhones, android phones, iPads, Windows laptops, and MacBooks.

LBHA desires to replace its current self-hosted software application with a web-based SaaS solution to meet its housing/tenant management and accounting needs, as described in Section 2.

Proposals are sought from qualified Proposers providing web-based SaaS solutions that meet LBHA's housing/tenant management and accounting needs as described in this RFP. LBHA intends to award a contract to the Proposer that submits the highest-ranked proposal.

## Section 2: Proposal Response Guidelines

To ensure the fairness of proposal evaluations, proposals must be assembled in strict adherence to the submittal requirements identified in this section and following the formats required by all parts within **Section 2 — Proposal Response Guidelines** of this RFP. Failure to comply with all organizational proposal requirements may result in disqualification. Proposals should be prepared as simply as possible and provide a straightforward, concise description of the proposed SaaS solution and professional implementation services to satisfy the requirements of this RFP. Attention should be given to accuracy, completeness, relevance, and clarity of content. Proposals must address each section, and they must be presented in the same ordered format as specified in this section (Section 2).

Before submitting proposals, Proposers should be familiar with all contract conditions referred to in this document and any addenda issued before the proposal submission date. Such addenda shall form a part of the RFP and shall be made a part of the contract. Addenda will be posted on LBHA’s website at [www.l-bha.org/rfp-documents](http://www.l-bha.org/rfp-documents) and will be provided to known Proposers through email.

The terms of the RFP, the selected proposal, and any additional documentation (e.g., questions and answers) provided by the Proposer during the solicitation process will be integrated into the final contract for services entered between LBHA and the selected Proposer. It shall be the Proposer’s responsibility to ascertain that the proposal includes all addenda issued before the proposal submission date.

### Anticipated RFP Schedule:

The **RFP Schedule of Events** table below represents LBHA’s anticipated schedule that will be followed for receiving and evaluating the proposals.

### Tentative RFP Schedule of Events

RFP EVENT		DATE / TIME (2023)
1	LBHA issues Request for Proposal	March 28
2	Deadline for Written Questions and/or Comments	April 4 – 4 PM PST
3	LBHA issues Responses to Written Questions and Comments	April 11 – 4 PM PST
4	Deadline for Submitting Proposals	April 25 – 4 PM PST

LBHA reserves the right, at its sole discretion, to adjust this schedule, as it deems necessary, without prior notice. Notification of any adjustment to the RFP Schedule of Events will be provided as an Addenda. It shall be the Proposer’s responsibility to check regularly for addenda, clarifications, and other notifications that may be pertinent to this process.

The RFP and subsequent evaluation of proposals will allow LBHA to identify a solution to best meet LBHA’s needs. Proposers may be asked to complete a remote system demonstration.

### RFP Coordinator:

All communications (questions, concerns, and protests) concerning this RFP must be submitted in writing directly to the RFP Coordinator identified below at the email address provided. The RFP Coordinator will

be the single point of contact for this RFP as follows:

**Jeff Knox, CFO and IT Specialist**

[jeffk@L-bha.org](mailto:jeffk@L-bha.org)

**Proposer Requests for Additional Information:**

Requests for information regarding LBHA's services, programs, or personnel, or any other information shall be submitted in writing directly to the RFP Coordinator at the email address provided. Answers shall be provided to all prospective Proposers of record on the date that answers are available.

**Solicitation Protests:**

Any complaints or perceived inequities related to this RFP shall be in writing and submitted to the RFP Coordinator's email and shall be received no later than the date listed in the RFP Schedule of Events table. Such submittals will be reviewed upon receipt and will be answered in writing. No such protests or requests will be considered if received after the deadline. No oral or telephone protests, or requests, will be accepted.

**Proposal Preparation Costs:**

LBHA will not pay any costs associated with the preparation, submittal, or presentation of any proposal.

**RFP General Requirements:**

The Proposer must adhere to the following LBHA requirements:

- Contingencies – This RFP does not commit LBHA to award a contract. The Housing Authority reserves the right to accept or reject any or all proposals if LBHA determines it is in the best interest of the Housing Authority to do so. LBHA will notify all Proposers, in writing, if LBHA rejects all proposals.
- Disclosure of Proposal Contents – Proposer understands and acknowledges that LBHA is a governmental entity subject to the laws of the State of Oregon and that any reports, data, or other information supplied to LBHA is subject to being disclosed as a public record in accordance with the Oregon Public Records Law (Chapter 192 of the Oregon Revised Statutes). All proposals and other materials submitted become and remain the property of LBHA and, as such, are considered public information and subject to public disclosure under the Oregon Public Records Law.
- Legal Compliance – By submitting a proposal, the Proposer agrees to comply with all applicable federal, state and local laws, rules, regulations, executive orders, ordinances and codes, and obtain any licenses or permits required to provide the services under this RFP.

**Proposer Minimum Qualifications:**

Proposers must submit comprehensive information that demonstrates and provides evidence that it has the full spectrum of capabilities, experience, and professional staff and expertise to deliver the products and perform the professional services described in this RFP. The Proposers responding to this RFP must:

- a) Have a minimum of ten (10) years of experience providing the requested software and services.
- b) Have a minimum of five (5) systems installed in other organizations that are comparable in size and scope to the proposed system for LBHA.
- c) Have sufficient, competent, and skilled staff, with experience in performing the services.
- d) Have the necessary credentials and licenses (if applicable) that govern the software and services provided.

- e) Adhere to all applicable local, state, and federal laws.
- f) Be able to provide the services confidentially and professionally.
- g) Provide proof of the minimum insurance requirements (details provided in Section 4).

### Proposal Submittal:

Proposals must conform to the requirements outlined in this RFP #02-2023. Proposals not conforming to these guidelines may be rejected as non-responsive. Proposals must be submitted no later than **4PM PST on April 25, 2023**, to:

Email: [jeffk@L-bha.org](mailto:jeffk@L-bha.org)

It is the Proposer's responsibility to assume the risk of the proposal submission. LBHA assumes no responsibility for delays caused by any email delivery service.

**Proposers who plan to submit proposals must provide an electronic version of the proposal and the Requirements Traceability Matrix (RTM) in non-editable, pdf format, to the email address listed above. In addition, the RTM MUST be submitted in Microsoft Excel format. All proposals, including the RTM in Excel format, shall be submitted via e-mail.** Proposals must indicate the legal name, address, and telephone number of the Proposer.

### Submittal Requirements:

Proposals shall be prepared to satisfy the requirements of the RFP. *EMPHASIS SHOULD BE CONCENTRATED ON ACCURACY, COMPLETENESS, AND CLARITY OF CONTENT.* All parts, pages, figures, and tables should be numbered and labeled clearly. The proposal must be organized as follows:

#### Technical Proposal

Section	Title
1	Transmittal Letter
2	Executive Summary
3	Proposer Background and Qualifications
4	SaaS Solution Summary
5	Implementation Plan
6	Staffing Plan
7	Ongoing Support Services
8	Functional System Requirements
9	Client References
10	License and Maintenance Agreements
11	Exceptions and Deviations
12	Other Required Forms and Attachments

#### Cost Proposal (SEPARATE DOCUMENT)

Section	Title
1	Cost

Instructions relative to each part of the response to this RFP are defined in the remainder of this section.

### **Transmittal Letter (Technical Proposal Section 1)**

The Proposer shall include a Transmittal Letter and expression of interest in the project. The Proposer should indicate a willingness to enter a contract with LBHA and meet the requirements of this RFP, including insurance requirements. The Transmittal Letter shall also name the person(s) authorized to represent the Proposer in any negotiations with the name and title of the person(s) legally authorized to sign any contract that may result. The letter must be signed by the Proposer's authorized representative, along with the email address and telephone number(s). This part of the response should not exceed two pages.

### **Executive Summary (Technical Proposal Section 2)**

The Proposer shall include an Executive Summary as a brief narrative not to exceed two pages describing the proposed solution. The summary should contain as little technical commentary as possible and should be oriented toward non-technical personnel. The Executive Summary should not include cost quotations.

### **Proposer Background and Qualifications (Technical Proposal Section 3)**

This evaluation component will allow LBHA to assess the Proposer's qualifications and determine the Proposer's stability as well as the ability to support the commitments outlined in response to this RFP. The Proposer shall address Minimum Proposer qualifications cited as **Section 2 – Proposer Minimum Qualifications** in this RFP and may also include additional information.

### **SaaS Solution Summary (Technical Proposal Section 4)**

Proposers are required to provide a general description of the application program product as well as technical aspects and how they will meet the requirements of this RFP. This section must address, at a minimum, the following items:

- Describe the Proposer's overall proposed technology solution.
- Describe the product direction for the company, including time frames.
- Describe unique aspects of the Proposer's solution in the marketplace.
- Describe components of the solution that are industry-standard versus proprietary to the Proposer.
- For third-party products proposed that are integrated with the Proposer's solution, provide the following for each product:
  - The reason that this product is a third-party product versus being part of the Proposer's software solution.
  - The extent to which this third-party product is integrated with the Proposer's solution.

- Describe the Cloud, or SaaS, solution offered by the Proposer. Please describe the Cloud environment and how the LBHA's critical data will be stored and kept safe, the backup process, the upgrade process, and all other aspects of the SaaS offering. Also break down responsibilities that the Proposer owns and those that are owned by LBHA.

### **Implementation Plan (Technical Proposal Section 5)**

The Proposer shall provide an implementation plan in a narrative format supported by an activity level project plan that details how the proposed solution is to be implemented. This implementation plan should include the following elements:

1. General Implementation Approach
2. Project Management Approach
3. Software and Storage Design, and Installation Consulting
4. Data Conversion Plan
5. Report Development
6. Integration and Interfaces
7. Training
8. Change Management Approach
9. Testing
10. Operational Redesign
11. System Documentation and Manuals
12. Disaster Recovery Plan
13. Knowledge Transfer to Staff

The Proposer should not be constrained to only include the above items in the proposal response if the Proposer feels that additional elements may add value to the overall implementation plan. LBHA requests that the Proposer provide their plan in a PDF format as part of the proposal response. Further details on what is to be provided as part of the proposed implementation plan are included in the following subsections.

#### **5.1 - General Implementation Approach**

Provide a general overview of the implementation approach you plan to use for LBHA that includes addressing the following items:

- Describe how you transition from the sales cycle to the implementation phase of the project.
- Describe critical differentiators of the approach as it relates to implementing a solution on time, within budget, and with the ability to meet the needs of LBHA.
- Describe how you decide on a preferred implementation phasing of software modules, if applicable. What is your recommended approach for this implementation?

Any unique tools, techniques, or methods that you use should be described in this section.

## **5.2 - Project Management Approach**

LBHA expects the Proposer to provide project management resources leading to the successful deployment of the system. This project manager will be the point-of-contact (POC) and work as a team member with LBHA's project management team for the system implementation phase. It is expected that this project manager will be responsive and flexible to be on-site as requested if LBHA's project management team deems necessary. This project manager must be an employee of the Proposer.

The Proposer shall provide an overall description of their project management approach towards this type of engagement and projected timing for significant phases. The Proposer shall also provide a high-level implementation work plan for achieving the successful deployment of the proposed system.

This evaluation component will allow LBHA to assess the Proposer's expertise in developing a project schedule and potentially showcase how the Proposer approaches the inclusion of LBHA stakeholders and workforce.

## **5.3 - Installation Consulting**

The Proposer is expected to work closely with LBHA's IT personnel to specify, furnish, deliver, install, and support all application and system software that may include preinstalling or equipment staging. What do you propose for the most effective deployment of hardware, software, and other related items necessary to begin implementation of the SaaS solution?

Additionally, LBHA expects the selected Proposer to conduct a test of the system backup and recovery solution prior to going live.

## **5.4 - Data Conversion Plan**

LBHA anticipates that data conversion will occur when migrating to the new SaaS solution. The Proposer is expected to assist LBHA in the conversion of both electronic and manual data to the new system. It is anticipated that the Proposer will help LBHA with the data extraction from HMS, including data scrubbing and data pre-processing. The Proposer will be responsible for overall data conversion coordination, the definition of file layouts, and data import and validation into the new solution.

Please describe:

- Your general approach towards data conversion and how you would work with LBHA to determine what should be converted.
- Your organization's recommended approach toward retention of legacy data.

### 5.5 - Report Development

For specific reporting requirements, it is anticipated that the Proposer will take the lead on developing any reports required as part of the initial deployment of the system. The Proposer is expected to provide specialized knowledge and information to LBHA staff during the development of needed reports, via technical training on the tools used for report development, database schema and architecture, etc.

Provide information on your reporting approach including:

- Description of various methods of reporting.
- Methods for LBHA to identify, specify, and develop required reports during the implementation and a method for LBHA to create reports post-implementation.

### 5.6 - Integration and Interfaces

Proposer *must* comply with the information contained in **Section 5 - Requirements Traceability Matrix (Attachment A)** to meet LBHA's business needs.

Please describe the following items:

- The extent to which the various modules are integrated versus being purchased separately and interfaced.
- Your approach towards interfacing and integration with other solutions including the use of specific tools, methods, and standards.
- Potential issues for integrating with specific technologies that are used within LBHA.
- Potential tools or assistance to easily incorporate customizations into new versions or releases of your software if customizations are made.

### 5.7 - End-User Training

It is expected that the Proposer will provide LBHA with training programs to ensure efficient and effective delivery of the system implementation services.

- End-user Training Approach: All end-user and technical training will be performed onsite through implementation and be performed by the Proposer.
  - End-user implementation training will be provided by the Proposer and include joint participation by the relevant LBHA personnel for the specific area of the new software system.
  - Technical Implementation training will include training for LBHA IT staff on the technologies required to support the new software.

### **5.8 - Change Management Approach**

LBHA recognizes that a movement from the current environment to a new solution will present Change Management challenges. The Proposer should identify their approach towards Change Management including any unique approaches or tools that will be used.

### **5.9 - System Testing**

The Proposer should describe their recommended approach to the following types of testing that are anticipated to be performed on the project and the kind of assistance they anticipate providing to LBHA related to such testing:

- System testing
- Integration testing
- Stress/performance testing
- User acceptance testing

### **5.10 - Operational Redesign**

With the deployment of the new SaaS solution, LBHA wishes to take advantage of capabilities within the software that provide support for operational improvements. Proposers are requested to describe their approach and flexibility towards operational redesign that must comply with the information contained in **Section 5 - Requirements Traceability Matrix (Attachment A)** to meet LBHA's business needs.

### **5.11 - System Documentation and Manuals**

The Proposers are expected to provide user manuals and online help for use by LBHA as part of the initial training and on-going operational support. Additionally, the Proposers are expected to provide technical documentation.

- Describe what documentation (user guide, technical guide, training materials, etc.) is available on the system and any related costs.
- Describe what types of documentation you anticipate developing during the project.

### **5.12 - Disaster Recovery Plan**

The Proposers should describe the services provided for disaster recovery, if any, as part of your proposed solution.

### **5.13 - Knowledge Transfer**

The Proposers should describe their process for ensuring that a transfer of knowledge occurs back to LBHA staff such that staff can support and maintain the application in the most proficient manner once the SaaS solution implementation engagement is complete.

### **Staffing Plan (Technical Proposal Section 6)**

The Proposers must detail the type and amount of implementation support to be provided (e.g., number of personnel, level of staff, time commitment, etc.). Include resumes for all personnel that will be assigned to the project. If the Proposers are using subcontractors, please include information on subcontracting staff being used and their specific role on the project. It is important to note that the assigned Project Manager is required to be an employee of the Proposer.

The Proposers shall also provide an overall project organizational structure for LBHA staff involvement during the project. Identify the roles and responsibilities of each component of this structure. This includes an appropriate governance structure in which to manage the project.

### **Ongoing Support Services (Technical Proposal Section 7)**

The Proposer is expected to specify the nature and conditions of any post-implementation support options, including:

- Post go-live support that is included in the proposal response.
- Onsite or remote support (e.g., system tuning, application configuration, interface issues, report development, network optimization, user training and tips to optimize the user experience).
- Help Desk services (If there is a service level agreement for your Help Desk, please provide a copy with your RFP response).
- Toll-free support line.
- Online user community/knowledgebase (i.e., how it is accessed, who updates it, etc.).

The Proposers shall also describe the maintenance programs and options with associated pricing to be included in the separate Cost Proposal.

### **Functional System Requirements (Technical Proposal Section 8)**

The Proposers must complete the electronic (Microsoft Excel) version of the Requirements Traceability Matrix (RTM). The RTM is to be inserted into this section of the technical proposal in PDF format. In addition, the Proposer must submit an electronic version of the completed RTM in Microsoft Excel format. The RTM will identify the Proposer's ability to meet LBHA's system requirements for the new SaaS solution. The list of system requirements for the software is included in **Section 5 – Requirements Traceability Matrix (Attachment A)** of this RFP. **Please note: The response to these requirements should be provided in the exact format as provided (e.g., no additional macros, formulas, extra columns, modifications, passwords, etc.). Failure to do so can result in disqualification of the entire proposal.**

### **Client References (Technical Proposal Section 9)**

References will be contacted by LBHA to assist with the evaluation of experience, expertise, and customer's satisfaction. Provide three (3) client references including the contact names, phone numbers, email addresses and mailing addresses from customers for whom the Proposer is currently or has previously provided services as required in this RFP, within the last five (5) years, preferably with comparable housing authorities. Each reference must be willing to make themselves available for a conference call lasting thirty (30) minutes, including a possible virtual "site visit" to demonstrate the organizations use of the proposed system.

The template for completing the Proposer references is provided in **Section 5 – Proposer Reference Template (Attachment C)** of this RFP.

**License and Maintenance Agreements (Technical Proposal Section 10)**

Sample license and maintenance agreements must be provided in this part of the Proposers' responses for all components of the recommended solution(s) (i.e., hardware, software, operating system, database, etc.). Indicate the basis on how licenses are determined.

**Exceptions and Deviations (Technical Proposal Section 11)**

If the Proposers find it impossible or impractical to adhere to any portion of these specifications and all attachments, it shall be so stated in its proposal, with all deviations grouped in a separate section entitled, "Exceptions & Deviations." This section will be all-inclusive and will contain a definition statement of every objection or deviation with adherence to specific RFP sections. **Objections or deviations expressed only in other parts of the proposal, either directly or by implication, will not be accepted as deviations.**

**Other Required Forms and Attachments (Technical Proposal Section 12)**

Please provide all other required forms in this section:

- **Profile of Company Form**  
The Profile of Company Form is attached hereto as Attachment B to this RFP document. This 2-page form must be fully completed, executed, and submitted under this section as a part of the proposal submittal.
- **Proposer Reference Template**  
The Proposer Reference Template is attached hereto as Attachment C to this RFP document.
- Signed Addenda (if any)
- Other signed documentation as required by LBHA.

**Cost (Cost Proposal Section 1) – Separate Document from Technical Proposal**

The Proposer must offer separate prices for all software, hardware, proposed services, and the maximum amount for travel expenses, including but not limited to:

- Software license with software assurance
- Additional software modules
- Implementation (Professional Services)
- Annual support and maintenance
- Software integration
- Hardware integration
- Data Conversion
- End-User Training
- Travel Expenses
- Ongoing Customer Support

## Section 3: Evaluation Process

LBHA's Selection Committee will be representing the Housing Authority's workforce. The role of the Selection Committee is to evaluate the proposals submitted and make a recommendation of award, based upon the outcome of the Proposal Evaluation Process.

### Proposal Evaluation Process

The Proposal Evaluation Process will encompass the following:

- Phase 1: Proposal Evaluation (Technical and Cost Evaluation)
- Phase 2: Reference Checks (Proposer Validation)
- Phase 3: Demonstrations [OPTIONAL: UPON LBHA's REQUEST]

Scoring will be completed by the Selection Committee based upon the Evaluation Criteria listed below in *Evaluation Criteria: Scoring and Competitive Range*. All scores for each Proposer shall be added together to arrive at a final score for each proposal following the completion of the multi-phased Proposal Evaluation Process. Proposals will then be ranked in descending order by the total proposal score. LBHA reserves the right to not enter into any contract as a result of this bid invitation.

### Evaluation Criteria: Scoring and Competitive Range

The criteria listed below will be used by the Selection Committee to evaluate the proposals to determine the optimal SaaS solution. Scoring will be completed covering all areas listed below in the Evaluation Criteria. LBHA reserves the right to negotiate with any of the Proposers.

Points across the multi-phased Proposal Evaluation Process will be weighted as follows:

<b>Proposal Evaluation Process = 200 Points</b>	
Phase 1 – Proposal Evaluation (Technical)	100
Phase 1 – Proposal Evaluation (Cost)	50
Phase 2 – Reference Checks	25
Phase 3 – Demo (Optional: Upon LBHA's Request)	25
<b>Total Scoring</b>	<b>0 – 200 Points</b>

After all phases have been completed, the LBHA Selection Committee will finalize the composite score across all phases of evaluation. LBHA may commence negotiations with the highest-ranked eligible Proposers or may commence simultaneous negotiations with all qualified Proposers.

### Phase 1 – Proposal Evaluation

To determine qualified Proposers in Phase 1, LBHA will evaluate and score each proposal based upon the criteria listed below to rank the proposals. The LBHA selection Committee will also evaluate the proposed Cost by each Proposer. LBHA’s evaluation of cost is at its own discretion, meaning that the lowest cost does not guarantee the highest scoring.

The total possible points will be 150 for Phase 1.

<b>Phase 1 (Technical) = 100 Points</b>	
Transmittal Letter	Pass / Fail
SaaS Solution	20
Project Team	10
Implementation Approach	10
Fulfillment of System Requirements (RTM)	40
Qualifications	20
<b>Phase 1 (Proposal) Total Scoring</b>	<b>0 – 100 Points</b>

<b>Phase 1 (Cost) = 50 Points</b>	
Total Cost (SaaS/Implementation)	50
<b>Phase 1 (Cost) Total Scoring</b>	<b>0 – 50 Points</b>

### Phase 2 – Client Reference Checks

During Phase 2, the LBHA’s Selection Committee will conduct Reference Checks with current clients of the Proposers. Proposers shall provide three (3) client references, preferably all Housing Authorities. These References should be customers with requirements similar to those of LBHA, including successful system implementations that are comparable in size, scope, and operating budget to LBHA’s SaaS implementation. LBHA reserves the right to contact these reference clients and to discuss their satisfaction with the Proposer, its products, and its proposed solutions in response to this RFP.

The total possible points will be 25 for Phase 2.

<b>Phase 2 – Client Reference Checks = 25 Points</b>	
Reference Checks	25
<b>Total Points</b>	<b>0 – 25 points</b>

### Phase 3 – System Demonstration (Optional)

LBHA’s Selection Committee may request a SaaS Demo. If the Demo is not requested by LBHA, all Proposers will automatically receive the 25 points for this section.

The total possible points will be 25 for Phase 3.

<b>Phase 3 – Demonstration (Optional) = 25 Points</b>	
Demo	25
<b>Total Points</b>	<b>0 – 25 points</b>

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## Section 4: Contract and Insurance Requirements

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### CONTRACT REQUIREMENTS:

The successful Proposer will be expected to enter into a contract incorporating the following terms and conditions, and such additional terms and conditions standard to services of this type. The Proposer shall be referred to as “Contractor” to detail LBHA’s Contract Requirements, which include:

- a) Control – All services by the Contractor will be performed in a manner satisfactory to **LBHA**, and accordance with the generally accepted business practices and procedures of **LBHA**.
- b) Contractor’s Personnel – The Contractor certifies that it presently has adequate qualified personnel to perform all services required under this Contract. All work under this Contract will be supervised by the Contractor with the coordination of **LBHA** personnel or their designee. The Contractor further certifies that all its employees assigned to serve **LBHA** have such knowledge and experience as required to perform the duties assigned to them. Any employee of the Contractor who, in the opinion of **LBHA**, is incompetent, or whose conduct becomes detrimental to the work, shall immediately be removed from association with services under this Contract.
- c) Independent Status:
  - 1) Nothing in this Contract shall be deemed to represent that the Contractor, or any of the Contractor's employees or agents, are the agents, representatives, or employees of **LBHA**. The Contractor will be an independent Contractor over the details and means for performing its obligations under this Contract. Anything in this Contract which may appear to give **LBHA** the right to direct the Contractor as to the details of the performance of its obligations under this Contract or to exercise a measure of control over the Contractor is solely for purposes of compliance with local, state and federal regulations and means that the Contractor will follow the desires of **LBHA** only as to the intended results of the scope of this Contract.
  - 2) It is further expressly agreed and understood by Contractor that neither it nor its employees or agents are entitled to any benefits which normally accrue to employees of **LBHA**; that the Contractor has been retained by **LBHA** to perform the services specified herein (not hired) and that the remuneration specified herein is considered fees for services performed (not wages) and that invoices submitted to **LBHA** by the Contractor for services performed shall be on the Contractor's letterhead.
- d) Termination or Abandonment – It shall be cause for the immediate termination of this Contract if, after its execution, **LBHA** determines that either:
  - 1) The Contractor or any of its principals, partners, or corporate officers, if a corporation, including the corporation itself, has pleaded nolo contendere, or has pleaded or been found guilty of a criminal violation, whether state or federal, involving, but not limited to, governmental sales or purchases, including but not limited to the rigging of bids, price-fixing, or any other collusive and illegal activity pertaining to bidding and governmental contracting.
  - 2) The Contractor has subcontracted, assigned, delegated, or transferred its rights, obligations, or interests under this Contract without **LBHA’s** consent or approval.

- 3) The Contractor has filed bankruptcy, become insolvent or made an assignment for the benefit of creditors, or a receiver, or similar officer is appointed to take charge of all or part of the Contractor's assets.
  - 4) **LBHA** may terminate the Contract upon seven (7) days written notice by **LBHA** or its authorized agent to the Contractor for the Contractor's failure to provide the services specified under this Contract.
- e) Subcontracting, Assignment or Transfer – Any subcontracting, assignment, delegation or transfer of all or part of the rights, responsibilities, or interest of either party to this Contract is prohibited unless by written consent of the other party. No subcontracting, assignment, delegation, or transfer shall relieve the Contractor from the performance of its duties under this contract. **LBHA** shall not be responsible for the fulfillment of the Contractor's obligations to its transferors or subcontractors. Upon the request of the other party, the subcontracting, assigning, delegating, or transferring party shall provide all documents evidencing the assignment.
  - f) Conflict of Interest – The Contractor covenants that it has no public or private interest and will not acquire directly or indirectly any interest which would conflict in any manner with the performance of its services. The Contractor warrants that no part of the total contract amount provided herein shall be paid directly or indirectly to any officer or employee of **LBHA** as wages, compensation, or gifts in exchange for acting as officer, agent, employee, subcontractor to the Contractor in connection with any work contemplated or performed relative to this Contract.
  - g) Covenant Against Contingent Fees – The Contractor warrants that it has not employed or retained any company or person other than a bona fide employee working solely for the Contractor, to solicit or secure this Contract, and that it has not paid or agreed to pay any company or person, other than a bona fide employee working solely for the Contractor any fee, commission, percentage, brokerage fee, gift, or any other consideration contingent upon or resulting from the award or making of this Contract. For breach or violation of this warranty, **LBHA** will have the right to recover the full amount of such fee, commission, percentage, brokerage fee, gift, or other consideration.
  - h) Employment of **LBHA** Workers – The Contractor will not engage in a full or part-time or another basis during the period of the Contract, any professional or technical personnel who are in the current employment of **LBHA**. Notwithstanding the foregoing, no prior **LBHA** official or employee may be employed by or receive compensation, wages, or benefits from the Contractor for a period of one year from employment separation from **LBHA** if during the period of employment with **LBHA** employee or official had any direct or indirect involvement with the Contractor's services or operations provided to **LBHA**.
  - i) Arbitration – Any dispute concerning a question of fact in connection with the work not disposed of by agreement between the Contractor and **LBHA** will be referred to **LBHA's Executive Director** or her duly authorized representative, whose decision regarding the same will be final.
  - j) General Compliance with Laws:
    - 1) If required, the Contractor shall certify that it is qualified and duly licensed to do business in the State of Oregon and that it will take such action as, from time to time, may be necessary to remain so qualified and it shall obtain, at its expense, all licenses, permits, insurance, and governmental approvals, if any, necessary to the performance of its obligations under this Contract.
    - 2) The Contractor is assumed to be familiar with and agrees that at all times it will observe and comply with all federal, state, and local laws, ordinances, and regulations in any manner affecting the conduct of the work. The preceding shall include but is not limited to, compliance with all Equal Employment Opportunity laws, the Fair Labor Standards Act, Occupational Safety and Health Administration (OSHA) requirements, the Americans with Disabilities Act (ADA), and

- 3) This Contract will be interpreted in accordance with the laws of the State of Oregon. By execution of this contract, the Contractor agrees that all actions, whether sounding in contract or tort, relating to the validity, construction, interpretation, and enforcement of this contract will be instituted and litigated in the courts of the State of Oregon, located in Albany, Oregon, and in no other. In accordance herewith, the parties to this contract submit to the jurisdiction of the courts of the State of Oregon located in Albany, Oregon.
- k) Nondiscrimination – The Contractor hereby agrees, warrants, and assures that no person shall be excluded from participation in, be denied benefits of, or be otherwise subjected to discrimination in the performance of this Contract or in the employment practices of the Contractor on the grounds of handicap and/or disability, age, race, color, religion, sex, national origin, or any other classification protected by Federal, Oregon State constitutional, or statutory law. The Contractor shall upon request show proof of such nondiscrimination and shall post in conspicuous places available to all employees and applicants notices of nondiscrimination.
- l) Entire Agreement - This Contract contains the entire Contract of the parties, and there are no other promises or conditions in any other Contract whether oral or written. This Contract supersedes any prior written or oral Contracts between the parties.
- m) Amendment – This Contract may be modified or amended, only if the amendment is made in writing and is signed by both parties.
- n) Severability – If any provision of this Contract is held to be unlawful, invalid or unenforceable under any present or future laws, such provision shall be fully severable; and this Contract shall then be construed and enforced as if such unlawful, invalid or unenforceable provision had not been a part hereof. The remaining provisions of this Contract shall remain in full force and effect and shall not be affected by such unlawful, invalid, or unenforceable provision or by its severance here from. Furthermore, in lieu of such unlawful, invalid, or unenforceable provision, there shall be added automatically as a part of this Contract a provision as similar in terms to such unlawful, invalid, or unenforceable provision as may be possible, and be legal, valid and enforceable.
- o) No Waiver of Contractual Right – No waiver of any term, condition, default, or breach of this Contract, or of any document executed pursuant hereto, shall be effective unless in writing and executed by the party making such waiver; and no such waiver shall operate as a waiver of either (a) such term, condition, default, or breach on any other occasion or (b) any other term, condition, default, or breach of this Contract or such document. No delay or failure to enforce any provision in this Contract or any document executed pursuant hereto shall operate as a waiver of such provision or any other provision herein or in any document related hereto. The enforcement by any party of any right or remedy it may have under this Contract, or applicable law shall not be deemed an election of remedies or otherwise prevent such party from enforcement of one or more other remedies at any time.
- p) Subject to Funding – This Contract is subject to annual appropriations of funds by **LBHA**. In the event sufficient funds for this Contract are not appropriated by **LBHA** for any of its fiscal periods during the term hereof, then this Contract will be terminated. In the event of such termination, the Contractor shall be entitled to receive just, and equitable compensation for any satisfactory work performed as of the termination date.
- q) Travel Expenses – All travel expenses payable under this Contract shall not exceed the amount agreed upon and budgeted for travel in said Contract.
- r) Incorporation of Other Documents:
- 1) Contractor shall provide services pursuant to this Contract in accordance with the terms and conditions set forth within **LBHA's** Request for Proposals as well as the Response of Contractor, thereto, all of which are maintained on file within **LBHA's** Administrative Services Department and incorporated herein by reference.
  - 2) It is understood and agreed between the parties that in the event of a variance between the terms and conditions of this Contract and any amendment thereto and the terms and

conditions contained either within the Request for Proposals or the Response thereto, the terms and conditions of this Contract as well as any amendment shall take precedence and control the relationship and understanding of the parties.

- s) Waiver of Proprietary Interest – Notwithstanding anything to the contrary contained herein or within any other document supplied to **LBHA** by the Contractor, Contractor understands and acknowledges that **LBHA** is a governmental entity subject to the laws of the State of Oregon and that any reports, data or other information supplied to **LBHA** by Contractor due to services performed pursuant to this Contract is subject to being disclosed as a public record in accordance with the laws of the State of Oregon.
- t) Organization Status and Authority:
- 1) Contractor represents and warrants that it is a corporation, limited liability company, partnership, or other entity duly organized, validly existing and in good standing under the laws of the State of Oregon; it has the power and authority to own its properties and assets and is duly qualified to carry on its business in every jurisdiction wherein such qualification is necessary.
  - 2) The execution, delivery and performance of this Contract by the Contractor has been duly authorized by all requisite action and will not violate any provision of law, any order of any court or other agency of government, the organizational documents of the Contractor, any provision of any indenture, agreement or other instrument to which the Contractor is a party, or by which the Contractor's respective properties or assets are bound, or be in conflict with, result in a breach of, or constitute (with due notice or lapse of time or both) a default under any such indenture, agreement or other instrument, or result in the creation or imposition of any lien, charge or encumbrance of any nature whatsoever upon any of the properties or assets.
- u) Warranty – The Contractor warrants to **LBHA** that all Services shall be performed in accordance with acceptable standards in the industry applicable to the Services. The Contractor shall correct, at its sole cost and expense, any work reasonably deemed to be unsatisfactory by **LBHA**. The Contractor warrants to **LBHA** that all Services shall be in strict compliance with the terms of this Contract, and all applicable governmental laws, rules, and regulations.
- v) Rights in Data – **LBHA** shall become the owner, and the Contractor shall be required to grant to **LBHA**, or its successors, a perpetual, non-exclusive, non-transferable, royalty-free right, in the **LBHA**'s name, to use any deliverables provided by the Contractor under this Contract, regardless of whether they are proprietary to the Contractor or any third parties.

## INDEMNIFICATION AND INSURANCE REQUIREMENTS

- a) Responsibilities for Claims and Liabilities:
- 1) Contractor shall indemnify, defend, save and hold harmless LBHA, and its officials, officers, employees, agents, assigns, and instrumentalities from and against any and all claims, liability, losses or damages—including but not limited to Title VII and 42 USC 1983 prohibited acts—arising out of or resulting from any conduct; whether actions or omissions; whether intentional, unintentional, or negligent; whether legal or illegal; or otherwise that occur in connection with or in breach of this Contract or the performance of the duties hereunder, whether performed by the Contractor its sub-contractors, agents, employees or assigns. This indemnification shall survive the termination or conclusion of this Contract.
  - 2) The Contractor expressly understands and agrees that any insurance protection required by this Contract or otherwise provided by the Contractor shall in no way limit the responsibility to indemnify, defend, save, and hold harmless LBHA or its officials, officers, employees, agents, assigns, and instrumentalities as herein provided.
    - i. LBHA has no obligation to provide legal counsel or defense to the Contractor or its

- sub-contractors in the event that a suit, claim or action of any character is brought by any person not a party to this Contract against the Contractor as a result of or relating to obligations under this Contract.
- ii. Except as expressly provided herein, LBHA has no obligation for the payment of any judgment or the settlement of any claims against the Contractor as a result of or relating to obligations under this Contract.
  - iii. The Contractor shall immediately notify the Contracting Officer, c/o Linn-Benton Housing Authority, 1250 Queen Avenue SE, Albany, OR 97322, of any claim or suit made or filed against the Contractor or its sub-contractors regarding any matter resulting from or relating to Contractor's obligations under this Contract and will cooperate, assist and consult with LBHA in the defense or investigation thereof.
- b) **Insurance Requirements** – The Contractor will provide evidence in the form of a Certificate of Insurance which shall name LBHA as an additional insured of the following insurance coverage and shall maintain coverage with limits of no less than:
- 1) Commercial General Liability Insurance:
    - i. \$1,000,000 limit per occurrence bodily injury and property damage,
    - ii. \$1,000,000 personal and advertising injury, and
    - iii. \$2,000,000 General Aggregate
  - 2) Business Automobile Liability Insurance of \$1,000,000 each accident for property damage and bodily injury. Coverage is to be provided on all Owned/Leased Autos, Non-Owned Autos, and Hired Autos.
  - 3) Workers Compensation and Employers' Liability Insurance - Including coverage for sole proprietors, partners, and officers, regardless of requirement by Oregon State Statute. The policy is to be specifically endorsed to include these individuals for coverage. Employers Liability is \$1,000,000 per accident. Contractor waives its right of subrogation against LBHA for any and all workers' compensation claims.
  - 4) Professional Liability Errors & Omissions Insurance at \$1,000,000 per claim or occurrence with a \$3,000,000 annual aggregate.

## **RIGHT TO MONITOR AND REVIEW**

**Access to Records** – During all phases of the work and services to be provided hereunder, the Contractor agrees to permit duly authorized agents and employees of LBHA, to enter the Contractor's offices for the purpose of inspections, reviews, and audits during normal working hours. Reviews may also be accomplished at meetings that are arranged at mutually agreeable times and places. The Contractor will maintain all books, documents, papers, accounting records, and other evidence pertaining to the fee paid under this Contract and make such materials available at their offices at all reasonable times during the period of this Contract and for three (3) years from the date of payment under this Contract for inspection by LBHA or by any other governmental entity or agency participating in the funding of this Contract, or any authorized agents thereof; copies of said records to be furnished if requested.

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## Section 5: Attachments

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### Attachment A:

#### Requirements Traceability Matrix (RTM)

- The Microsoft Excel version of the RTM shall be emailed to the Proposer upon request or it can be downloaded from LBHA's website, which can be found at [www.l-bha.org/rfp-documents](http://www.l-bha.org/rfp-documents). **This is a required part of the proposal.**
  - Please ensure that **BOTH** a non-editable PDF format version (within Technical proposal) and a Microsoft Excel version (Separate Document) are submitted electronically.

### Attachment B:

#### Profile of Company Form

### Attachment C:

#### Proposer Reference Template

Response	Definition	Instruction for Comments
S	<b>Standard:</b> Requirement is <b>included in the current software release</b> and will be implemented by the planned phase go-live date as part of the proposal from Proposers in accordance with agreed-upon configuration planning with the Housing Authority.	Respondents are encouraged, but not required, to provide additional information in the Comments column to further demonstrate the respondent/system's ability to meet the requirement.
F	<b>Future:</b> Requirement <b>will be available in a future software release</b> available to the Housing Authority, at which point it will be implemented in accordance with agreed-upon configuration planning with the Authority.	If a response indicator of "F" is provided for a requirement that will be met in a future software release, the Respondent shall indicate the planned release version, as well as the time the release will be generally available.
C	<b>Customization:</b> Requirement is <b>not included</b> in the current software release, and it is not planned to be a part of a future software release. However, <b>this feature could be provided with custom modifications</b> . All related customization costs should be indicated.	If a response indicator of "C" is provided for a requirement that will be met through a custom modification, the Respondent shall indicate the cost of such a modification.
T	<b>Third Party:</b> Requirement is <b>not</b> included in the current software release, and it is <b>not</b> planned to be a part of a future software release. However, this feature could be <b>provided with integration with a third-party system</b> . This system should be specified.	If a response indicator of "T" is provided for a requirement that will be met by integration with a third-party system, the Respondent shall identify this third-party system and include a cost proposal to secure this system.
N	<b>No:</b> Requirement cannot be provided.	N/A

<b>Financial Management</b>			
<b>Section ID</b>	<b>Description of Requirement</b>	<b>Response (S, F, C, T, N)</b>	<b>Comments</b>
1	General ledger accounting (with sub account allowance)		
2	Ability to import data into general ledger		
3	Budget creation and tracking		
4	Accounts Payable (AP)		
5	Automated AP and vendor payment processing online (i.e., third-party payment processing)		
6	Accounts Receivable (AR) for tenant and non-tenant accounts		
7	Invoicing for tenant and non-tenant accounts		
8	AP/AR integrations to work order system		
9	Purchase Order (PO) system		
10	AP/AR integrations to purchase order system		
11	PO and Work Order integrations		
12	Inventory Control		
13	Fixed Assets tracking		
14	Dual program integration for clients with Section 8 Vouchers who reside in an LBHA owned property		
15	Payment plan tracking		
16	Collections processing for Section 8 and LBHA Owned Property Tenants		
17	Vendor Portal		
18	Grant Management		
19	Construction Management - Job Costing		
20	Construction Management - Enter multiple contracts and subcontractors for various jobs and properties		
21	Journal entries, including Payroll journal entries and templates		
22	Bank Reconciliation		
23	Financial Reporting (Balance Sheet - Current Asset, Long-term asset differentiation, Current Liability, Long-term Liability differentiation)		
24	Income Statement		
25	Cash Flow Statement		
26	Electronic 1099 processing		
27	FDS Reporting		

<b>Rental Assistance Management</b>			
<b>Section ID</b>	<b>Description of Requirement</b>	<b>Response (S, F, C, T, N)</b>	<b>Comments</b>
1	Section 8 Voucher participant management		
2	Rent Reasonableness determinations		
3	HUD Rent calculations		
4	Creation and submission of 50058/50059 forms		
5	Participant portal that supports online payments		
6	Property owner/Property manager/Landlord portal		
7	Public Housing Information Center (PIC) submissions		
8	Voucher Management System (VMS) submissions		
9	Family Self-Sufficiency (FSS) program management for HCV/Section 8 clients		
10	FSS information viewable on the online participant portal		
11	Mobile HQS Inspections		
12	HQS Inspection module tied to HCV/Section 8 units		
13	HQS inspection information viewable on the landlord and participant portal		
14	Tracking and Management of PBV contracts		
15	Portability Tracking		
16	Ability to manage Tenant Payment Agreements		
17	Ability to process landlord overpayments and garnish the property owner		
18	Ability to process landlord abatements		

<b>Property Management</b>			
<b>Section ID</b>	<b>Description of Requirement</b>	<b>Response (S, F, C, T, N)</b>	<b>Comments</b>
1	Tenant management		
2	Tenant portal that supports online payments		
3	Creation and submission of Tenant Income Certification (TIC) for LIHTC and state/local programs		
4	Work Order system		
5	Mobile maintenance work order completion for android and iPhone devices		
6	Ability for workers to easily sort and select work orders based on various criteria out in the field		
7	Ability to manage legal activities for tenants (i.e. eviction, non-payment) with incident tracking		
8	Mobile inspections including basic housekeeping and unit abuse (android and iPhone devices)		
9	Tracking resident contracts		
10	Unit occupancy and vacancy tracking		
11	Rent calculations and estimations		

<b>Applicant Management</b>			
<b>Section ID</b>	<b>Description of Requirement</b>	<b>Response (S, F, C, T, N)</b>	<b>Comments</b>
1	Configurable intake processes		
2	Online applications (must allow online application submissions by bedroom size, meeting occupancy standards)		
3	Ability to view names and ages of household members on the online application and waitlist reports		
4	Ability to export application to PDF format (individual and batch)		
5	Ability for applicants to verify online that they continue to be interested in being on the waitlist		
6	Applicant portal for applicants to submit changes, to apply for additional waitlists, and to view their status on a waitlist		
7	Rent calculations and estimations		
8	Waiting list management		
9	Ability to find possible duplicated applicants		
10	Ability to merge duplicated applicant records into a single record		
11	Email forwarding, Reply, Attach, and Printing capabilities for portal communication purposes		
12	Generate a receipt of application showing programs client applied for online		
13	Generate a welcome letter via email when processing or approving application		
14	Generate correspondence letters to applicants		
15	Ability to search by all members on application		
16	Auto forward portal email to Admissions email		
17	Ability to search by address, social security number, DOB, Last name, First name, Client number, and Application confirmation number		

<b>Reporting</b>			
<b>Section ID</b>	<b>Description of Requirement</b>	<b>Response (S, F, C, T, N)</b>	<b>Comments</b>
1	Financial Reports		
2	HUD-Required reports		
3	Rent Roll reports		
4	Custom ad-hoc reports		
5	Ability to edit all reports		
<b>Correspondence Generation</b>			
<b>Section ID</b>	<b>Description of Requirement</b>	<b>Response (S, F, C, T, N)</b>	<b>Comments</b>
1	Ability for documents to be customized		
2	Dynamic data based on client information		
3	Generated correspondence can be viewed, edited, printed, or sent using industry standard software or an included tool		
<b>Security</b>			
<b>Section ID</b>	<b>Description of Requirement</b>	<b>Response (S, F, C, T, N)</b>	<b>Comments</b>
1	Access controls to allow access to features to be turned on and off by individual user, user group, or department		
2	Access controls per property or subsidy program		
3	Logging for all sign-ons and user activity within the system		
4	Ability to use Azure Active Directory as Single Sign-on provider		
5	Data Loss Prevention controls (control/prevent/log any data exports from the system)		
6	Data encrypted at rest and in transit		

<b>SaaS</b>			
<b>Section ID</b>	<b>Description of Requirement</b>	<b>Response (S, F, C, T, N)</b>	<b>Comments</b>
1	Solution must be web-based and contractor-hosted entirely within the United States of America, in at least 2 geographically separated locations to assure a highly available product and have a sufficient backup system in place to prevent data loss. <b>Describe Backup process in comments</b> (how are they done, where are they stored, how often, and what is recovery time).		
<b>Migration</b>			
<b>Section ID</b>	<b>Description of Requirement</b>	<b>Response (S, F, C, T, N)</b>	<b>Comments</b>
1	Migrate data from existing solution		
2	Provide Templates and Field definitions for data migration		
<b>Training</b>			
<b>Section ID</b>	<b>Description of Requirement</b>	<b>Response (S, F, C, T, N)</b>	<b>Comments</b>
1	Provide on-site training to staff. <b>Provide details in comments</b>		
2	Provide electronic training manuals and guides		
<b>Support</b>			
<b>Section ID</b>	<b>Description of Requirement</b>	<b>Response (S, F, C, T, N)</b>	<b>Comments</b>
1	Provide support services to staff		
2	Provide an online knowledgebase for the proposed software, accessible by LBHA users		

**PROFILE OF COMPANY FORM**

(This Form must be fully completed and placed under Proposal Section 12 of the proposal submittal.)

(1) Prime \_\_\_\_\_ Sub-contractor \_\_\_\_\_ (This form must be completed by and for each).

(2) Name of Company: \_\_\_\_\_ Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_

(3) Street Address, City, State, Zip: \_\_\_\_\_

(4) Please attach a brief biography/resume of the company, including the following information:  
 (a) Year Company Established; (b) Former Name and Year Established (if applicable); (c) Name of Parent Company and Date Acquired (if applicable).

(5) Identify Principals/Partners in Company (submit under Proposal Section 12 a brief professional resume for each):

NAME	TITLE	% OF OWNERSHIP

(6) Identify the individual(s) that will act as Project Manager and any other supervisory personnel that will work on the project. Please submit under Proposal Section 12 a brief resume for each. (Do not duplicate any resumes required above):

NAME	TITLE

(7) Federal Tax ID No.: \_\_\_\_\_

(8) State of Oregon Business License No.: \_\_\_\_\_

(9) State of \_\_\_\_\_ License Type and No.: \_\_\_\_\_

(10) Workers' Compensation Insurance Carrier: \_\_\_\_\_  
 Policy No.: \_\_\_\_\_ Expiration Date: \_\_\_\_\_

(11) Professional Liability Insurance Carrier: \_\_\_\_\_  
 Policy No.: \_\_\_\_\_ Expiration Date: \_\_\_\_\_

\_\_\_\_\_  
**Signature**                      **Date**                      **Printed Name**                      **Company**

<b>PROFILE OF COMPANY FORM</b>
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(This Form must be fully completed and placed under Proposal Section 12 of the proposal submittal.)

(12) Debarred Statement: Has this company, or any principal(s) ever been debarred from providing any services by the Federal Government, any state government, the State of \_\_\_\_, or any local government agency within or without the State of \_\_\_\_\_? Yes  No

If "Yes," please attach a full detailed explanation, including dates, circumstances, and current status.

(13) Disclosure Statement: Does this company or any principals thereof have any current, past, personal or professional relationship with any Commissioner or Officer of LBHA?

Yes  No

If "Yes," please attach a full detailed explanation, including dates, circumstances, and current status.

(14) Non-Collusive Affidavit: The undersigned party submitting this proposal hereby certifies that such proposal is genuine and not collusive and that said Proposer entity has not colluded, conspired, connived or agreed, directly or indirectly, with any Proposer or person, to put in a sham proposal or to refrain from proposing, and has not in any manner, directly or indirectly sought by agreement or collusion, or communication or conference, with any person, to fix the proposal price of affiant or of any other Proposer, to fix overhead, profit or cost element of said proposal price, or that of any other Proposer or to secure any advantage against the Housing Authority or any person interested in the proposed contract; and that all statements in said proposal are true.

(15) Verification Statement: The undersigned Proposer hereby states that by completing and submitting this form he/she is verifying that all information provided herein is, to the best of his/her knowledge, true and accurate, and agrees that if the Housing Authority discovers that any information entered herein is false, that shall entitle LBHA to not consider nor make award or to cancel any award with the undersigned party.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Company

## Proposer Reference Template

- Proposers may adjust size of Proposer Reference Template to accommodate contents if structure is maintained.

	<b>Client #1</b>
<b>Client Name:</b>	
<b>Contact Person:</b>	
<b>Contact Information:</b>	
<b>No. of Users</b>	
<b>Implementation Budget</b>	
<b>Date of Services:</b>	
<b>Project Description:</b>	

	<b>Client #2</b>
<b>Client Name:</b>	
<b>Contact Person:</b>	
<b>Contact Information:</b>	
<b>No. of Users</b>	
<b>Implementation Budget</b>	
<b>Date of Services:</b>	
<b>Project Description:</b>	

	<b>Client #3</b>
<b>Client Name:</b>	
<b>Contact Person:</b>	
<b>Contact Information:</b>	
<b>No. of Users</b>	
<b>Implementation Budget</b>	
<b>Date of Services:</b>	
<b>Project Description:</b>	