



**ADDENDUM #1**  
**ISSUE DATE: November 20, 2020**

This Addendum shall become and form a part of:

**Request for Proposals #2020-0150**  
**Enterprise Information Management (EIM) System Implementation Services**

**TO ALL VENDORS**

This Addendum, including all articles and corrections listed below, shall become a part of the original Request for Proposals ("RFP") package and shall be taken into account in preparing your proposal response.

The above-numbered solicitation is amended as set forth below. Vendors must acknowledge receipt of this addendum by signing and completing **Attachment 1: Addenda Acknowledgement Form**. The Addenda Acknowledgement Form must be submitted with the Firm's response to this RFP. *Failure to include the Form in the proposal response may subject your firm to disqualification.*

In order to ensure that all firms are given an equal opportunity to submit a competitive response, the following are responses to questions and/or requests for clarification concerning **RFP #2020-0150**.

**RFP DUE DATE AND TIME:** **Monday, November 23, 2020 at 03:00 P.M. Eastern Standard Time**

**REVISED RFP DUE DATE AND TIME:** **Thursday, December 03, 2020 at 03:00 P.M. Eastern Standard Time**

**NOTE:** The following documents are attached: **Attachment 1** – Addenda Acknowledgement Form

**1. Is a fixed price submission required or is time and materials acceptable?**

Answer: AH expects Respondents to provide a fixed cost proposal by EIM function utilizing the Fee Form located on the Prerequisites page.

**2. Are resource names and locations required for the submission? With an anticipated start to the program in the first quarter of 2021 but no defined date, will resource changes be permitted until such time that a defined start date is finalized?**

## RFP# 2020-0150 – Enterprise Information Management (EIM) System Implementation Services

Answer: Please refer back to Evaluation Question B – Organizational Structure & Staffing (25 Points) - resource names and locations are required for submission to maximize the Respondent's score on this portion of the evaluation. The capabilities and strength of the proposed staff is considered by the evaluation committee when recommending the successful firm. Resource changes will be permitted, where needed, if the following conditions are met: (1) AH approves the replacement resource prior to including that staff as part of the project team and (2) the replacement resource possesses the same level of experience and requisite knowledge to perform at a high level throughout the entire contract term.

**3. What are the KPIs that AH uses to drive/measure success?**

Answer: Atlanta Housing will measure the success of this project by the deliverables received from the selected vendor. The ultimate intent is to have an Enterprise Information Management system (implemented by the selected vendor) that has the capacity to manage master data and unstructured information (like documents, images, etc.), as well as provide end-user functionality such as ad hoc reporting and dashboards (where possible). Atlanta Housing expects the chosen vendor to provide adequate documentation for use and maintenance of the full system, including but not limited to, training end-users to develop reports and providing adequate documentation to support that training.

**4. Will submissions be evaluated for each of the 5 EIM functions and awarded individually or as a whole? Do the submissions need to outline cost, approach, etc. by each EIM function as well as a total?**

Answer: Atlanta Housing will score each Respondent based on the EIM function(s) they are submitting for utilizing the Evaluation Questions outlined in the RFP. Each function is not assigned individual points. Each respondent will outline the cost associated with those functions they are submitting on. For example, if a Respondent is submitting a proposal for EIM functions #1 and #3, the cost to complete those functions will be entered in the table and totaled and on line below the table. AH reserves the right to award to one or more Respondents depending on the evaluation committee's determination that it is in AH's best interest

**5. What are the KPIs that AH uses to drive/measure success?**

Answer: See Answer to Question #3.

**6. Has the reporting inventory been established and documented?**

Answer: No, the reporting inventory has not been established or documented. While AH will likely want to include some of our regular/standard reports, we are more interested in a system that has the ability to provide ad hoc reporting functionality to system users. Additionally, we prefer that the selected vendor provide adequate instructional documentation for us to develop reports and train our staff as needed.

## RFP# 2020-0150 – Enterprise Information Management (EIM) System Implementation Services

**7. Who will perform the project planning / Program Management activities? What role will AH program management have in overall management of the project and timelines?**

Answer: In projects like this one, it is not uncommon for there to be a Project Manager provided by the vendor and a Project Manager provided by AH. The AH Project Manager would focus on project specifics that require engagement with AH staff, while the vendor PM would provide timelines and vendor activities.

**8. Has any data profiling been completed to date? What tools or applications are in place for profiling and data cleansing?**

Answer: Some data profiling has been completed during the development of the EIM Strategy. It is important to remember that data changes daily and what was profiled previously may need updating as we enter into the implementation of the EIM. As an organization, we are also in the process of implementing new systems with additional data sources that were not considered at the time the strategy was developed. Currently, we are using a number of tools (mostly Microsoft tools; i.e., SQL Server Management Studio, Power BI, etc.). We anticipate and welcome suggestions by the chosen vendor once we enter into the initial phases of the implementation.

**9. Have specific data domains been identified and owners assigned for data governance? The RFP mentions Customer/Client and Financial but the assumption is that there are additional domains to be considered.**

Answer: We have some main domains tentatively determined, but final domains will be determined through progression of implementation of our Data Governance policy, which is currently in development.

**10. Is there a time sensitivity to the business case or business driver, for example, a data center shutdown or contract expiration?**

- No.

**Are there any specific non-functional requirements on some applications like flexibility and speed?**

- No. The expectation is that the applications perform according to industry standard operation for cloud platforms.

**Are there any chatty applications?**

- No.

**It's assumed that the users for AHA would be limited to Georgia State. Are there scenarios for end-users to be outside of GA?**

- At this time, there are no users outside of the state of Georgia.

## RFP# 2020-0150 – Enterprise Information Management (EIM) System Implementation Services

**Any Network Diagram which shows how different systems are communicating with each other and connection points?**

- At this time, SSIS and SFTP are the main processes by which most data is shared between applications.

**Any preferences on Prioritizing of Applications in the migration on the Cloud?**

- There is no preference on prioritizing applications. However, AH expects and anticipates the selected vendor to make recommendations as needed.

**Apart from Windows and Linux OS, do you have some other old operating systems in the mix, like AIX, Solaris?**

- No.

**What type of network segmentation is available, and how does that compare to your needs?**

- Atlanta Housing currently has network segmentation in place. AH utilizes firewalls to maintain access-controlled, routed network segmentation based on specific network function. The proposed EIM solution must be fully interoperable in such a segmented network environment.

**What percentage of servers are virtual servers?**

- The solution must be fully operable in a 100% virtualized server environment.

**11. To qualify the need we would some additional inputs. Can you share / summarize the initial Hybrid Cloud Architecture Strategy and Final Strategy?**

Answer: The Hybrid Cloud Architecture strategy includes suggested software, middleware, and front-end applications. The Final Strategy will expand upon the initial strategy with added recommendations for cloud infrastructure. Please refer back to the RFP as Atlanta Housing believes the most current and relevant information regarding the Hybrid Cloud Architecture Strategy already exists and the Final Strategy might incorporate suggestions from the selected Respondent(s) from this RFP.

**12. What are the system performance goals?**

Answer: Atlanta Housing expects both the hybrid cloud solution and the final EIM solution to maintain high availability with an adequate disaster recovery plan for restoring the system when necessary while supporting 200+ users at any given time. The cloud application needs to conform to regulatory and corporate compliance mandates, which will be shared upon contract execution.

**13. Would data cleansing, deduplication be required?**

Answer: Yes. Our expectation is that cleansing and deduplication is inherent to an EIM system and that the contracted vendor will advise where cleansing and deduplication is necessary. There are data elements that duplicate in the systems listed in the RFP and potential vendors should estimate both upfront costs of cleansing and deduplication for the systems listed in the RFP as well as include costs for incorporating such functions into the EIM.

## RFP# 2020-0150 – Enterprise Information Management (EIM) System Implementation Services

**14. Please share the current and expected interfaces with internal and external systems? Would third party software vendors provide APIs?**

Answer: Atlanta Housing will provide interface information upon contract with the selected vendor. Our expectations are such that we will use any APIs available through our software providers where appropriate and/or necessary. In situations where an API is not available, we expect that the vendor has the ability and resource(s) to build functionality similar to an API if it were determined to be a need.

**15. What security standards would apply to the project?**

Answer: Generally speaking, and to the extent possible, privacy and security controls associated with the EIM solution should adhere to guidance issued in the current NIST Special Publication 800-53. Optimally, though not absolutely required, the datacenter hosting the cloud-based EIM solution should be FedRAMP certified. Respondents must submit a detailed report regarding the data privacy and security controls implemented at the proposed solution hosting datacenter, as well as any location where any data associated with the project, e.g. emails, working documents or datasets, which may contain Atlanta Housing data elements, is stored. This report should include specifics around network security, data encryption, authentication, access control, and required staff Security Awareness Training programs, as well as any other notable security controls referenced in NIST SP 800-53.

As a further note, solution data and services should be stored and hosted only in or from facilities, which are physically located within the United States.

**16. Please share the approved budget for this requirement.**

Answer: It is not Atlanta Housing's practice to disclose budget information. It is expected that the Respondents price this project based on your subject matter expertise and assessment of the volume of work involved with this project.

**17. Is this RFP more of a services/implementation request versus a content management software purchase?**

Answer: This is a services/implementation request. AH will purchase any software necessary to fully realize the EIM.

**18. Has the Atlanta Housing Authority purchased an enterprise content management and process management software in the last 10 months?**

Answer: Atlanta Housing has not purchased an Enterprise Content Management system. We expect that the Enterprise Information Management system (implemented by the selected

## RFP# 2020-0150 – Enterprise Information Management (EIM) System Implementation Services

vendor) will have the capacity to manage master data and unstructured information (like documents, images, etc.), as well as provide end-user functionality such as ad hoc reporting.

**19. Is the expectation that this work will be both the development of a strategy and the execution of that data strategy?**

Answer: Atlanta Housing will provide a strategy to the contracted vendor.

**20. Is the desired scope of the data strategy enterprise wide?**

Answer: Yes. The scope of the strategy is for the entire enterprise.

**21. Has a prior data strategy been produced and if “yes” how old is that strategy?**

Answer: Yes. The strategy was completed in 2020.

**22. Please clarify if a current Data Catalog, Data Dictionary, Corporate Glossary is in place today.**

Answer: Yes. Atlanta Housing will provide a Data Catalog, Data Dictionary, and Corporate Glossary to the contracted vendor once the contract is executed. As stated in the RFP, we expect the contracted vendor to finalize the Data Catalog, Data Dictionary, and Corporate Glossary and make updates and adjustments as needed.

**23. Are tools in place today to support a Data Catalog, Data Dictionary, Corporate Glossary?**

Answer: At this time, Atlanta Housing employs very few tools to manage the Data Catalog, Data Dictionary, and Corporate Glossary. We anticipate and welcome suggestions by the chosen vendor once we enter into the initial phases of the implementation.

**24. Is a Data Governance organization currently in place?**

Answer: Atlanta Housing has a Governance, Risk, and Compliance organization within the Information Technology department however, our Data Governance policy is currently in development and a Data Governance committee will be defined.

**25. Have Data Stewards, Data Custodians, and Data Governance Steering Committee been established?**

Answer: Our Data Governance policy is currently in development and these roles will be established (see above response).

**26. Have the Initial Hybrid Cloud Architectural Design specification already been developed? If so, can AH please provide a list of the architecture model for services and functions that will remain on premises and those that will reside in the cloud?**

## RFP# 2020-0150 – Enterprise Information Management (EIM) System Implementation Services

Answer: Atlanta Housing will provide the Hybrid Cloud Architecture and Final Architecture models to the chosen vendor upon contract execution. For purposes of developing the proposal, each potential vendor should consider that the data platforms outlined in the RFP are cloud-based SaaS solutions with the exception of SQL-based proprietary solutions. We expect that the final EIM solution will inform the transition of any proprietary solution to a cloud platform (where possible).

**27. Is the ultimate intent for end users to be able to run their own standard and ad hoc reports? If so, how many end users would need to be trained on how to run reports?**

Answer: The ultimate intent is to have an Enterprise Information Management system (implemented by the selected vendor) that has the capacity to manage master data and unstructured information (like documents, images, etc.), as well as provide end-user functionality such as ad hoc reporting and dashboards (where possible). Atlanta Housing expects the chosen vendor to provide adequate documentation for use and maintenance of the full system, including but not limited to training end-users to develop reports and providing adequate documentation to support that training. .

**28. Organizationally, which area within AH will own EIM once it is operational?**

Answer: The Information Technology department will own and maintain the EIM once it is operational.

**29. What level of funding has been set aside for the potential 4 years of the contract period? Will this be federally funded?**

Answer: The resulting contract will be federally funded. The funding for each term of the contract is requested and approved in the upcoming fiscal year's budget cycle/process. The Board of Commissioners of Atlanta Housing will be briefed regarding the results of this public procurement and the multi-year contract obligation and formal approval will be sought from the Atlanta Housing Board of Commissioners prior to the President and Chief Executive Officer formally executing any multi-year contract(s).

**30. The RFP seems to imply that there is the expectation that the selected vendor will be running/maintaining the systems? Is that correct?**

Answer: No. The selected vendor will implement the system and, as stated in the RFP, provide adequate system documentation for use and maintenance of the full system, including but not limited to report training documentation for our end-users.

**31. Is the scope of the proposal limited to the strategy? Or will it also include the implementation and execution?**

Answer: Atlanta Housing will share the full strategy with the contracted vendor upon execution of the contract. The selected vendor will not be responsible for the strategy and is only responsible for implementation, executions, and adequate documentation for use and

## RFP# 2020-0150 – Enterprise Information Management (EIM) System Implementation Services

maintenance of the full system, including but not limited to training end-users to develop reports and providing adequate documentation to support that training.

**32. Should the pricing proposal be limited to only strategy and design? Or should an implementation budget be included also?**

Answer: This pricing proposal should only include the implementation budget. The strategy will be provided to the selected vendor upon contract.

**33. What is the time frame for the completion of the Initial Hybrid Cloud Architecture Strategy Execution?**

Answer: Atlanta Housing has an Enterprise Information Management (EIM) Strategy. Atlanta Housing will share the full strategy (which includes a proposed Initial Hybrid Cloud Architecture) with the contracted vendor upon execution of the contract.

**34. Is the intent that the initial phase of work, is to scope all functions? Or is this an all-inclusive list of services?**

Answer: (Functions Include: subject matter expertise, policy management, code base access, bug fixes, and other operational needs requested by AH.) Upon award of the contract, the initial phases of the project would be advised via the EIM strategy, however, our expectation is such that the selected vendor provide additional guidance and inputs for functions as needed.

**35. Is there a Business analysis that has been performed and identified current issues and pain points? If so, what are the critical business outcomes that AH is expecting out of this effort?**

Answer: Significant analysis was completed during the strategy refinement. The ultimate intent is to have an Enterprise Information Management system (implemented by the selected vendor) that has the capacity to manage master data and unstructured information (like documents, images, etc.), as well as provide end-user functionality such as ad hoc reporting and dashboards (where possible). Atlanta Housing expects the chosen vendor to provide adequate documentation for use and maintenance of the full system, including but not limited to training end-users to develop reports and providing adequate documentation to support that training.

**36. The RFP states that 'All operations associated with this service are to be performed in person and remotely when possible'; As we build out our budget and project team, given the concerns and restrictions due to COVID-19, will a vendor be penalized if they propose an all remote project team?**

Answer: Our expectations are that this work be done remotely. Should a specific need arise that requires access to the building, the vendor will provide detailed specifications so that our internal team of engineers may complete any work on premises.

**37. Part 4 Terms Sheet (page 9) contains certain terms that are non-standard to Respondent (e.g., insurance, indemnification). Is Respondent permitted to submit requested changes to**

RFP# 2020-0150 – Enterprise Information Management (EIM) System Implementation Services

**the clauses contained in Part 4 Term Sheet and/or submit supplemental terms to Part 4 Term Sheet as part of its proposal for Atlanta Housing’s consideration?**

Answer: Respondents are permitted to share requested changes to AH’s Terms Sheet – these clauses substantially comprise the AH agreement.

- 38. Section 4.1 Compliance with E-Verify. Section 4.1 references an “E-Verify Affidavit’ - see Prerequisites – State of Georgia Contractor E-Verify Affidavit” to be completed and submitted with Respondent’s proposal. Please provide the E-Verify Affidavit and any other documents to be completed and submitted with Respondent’s proposal.**

Answer: Respondents are expected to log in to AH’s Business Management Portal to access to the event and download all the Pre-Requisite documents. Please contact the Point of Contact if you experience technical difficulties accessing the Business Management Portal.

- 39. Section 4.9 Insurance, subsection 1.2 (i) Additional Insured Endorsement (page 11) requires Respondent to include Atlanta Housing as an additional insured under the Cyber Liability policy. However, Respondent’s Cyber Liability coverage is included within its Professional Liability policy. Since Atlanta Housing does not require additional insured status on the Professional Liability policy, in cases where the cyber liability and professional liability coverages are combined into one policy, will Atlanta Housing waive the additional insured requirement on the Cyber Liability coverage?**

Answer: It remains true, as is the case under any circumstance that AH must not be named as an additional insured party to any professional liability or errors & omissions policy.

- 40. Section 4.9 Insurance, Subsection 1.2 (page 12). Section 4.9, Subsection 1.2 appears to conflict with and/or be duplicative of the “Additional Requirements” section on page 13. Please clarify which requirements apply to Respondent.**

- **DELETE: Page 13:**

“The insurance carrier shall be licensed to transact business in the State of Georgia and shall carry a current A.M. Best’s rating of no less than B+ VI.”

- **DELETE: Page 13:**

AHA reserves the right, but not the obligation, to review and revise any insurance requirements, including limits, coverages and endorsements, based upon insurance market conditions affecting the availability and affordability of coverage. Additionally, AHA reserves the right, but not the obligation, to review and reject any insurance policies, certificates of insurance or insurer failing to meet the criteria stated herein.

- 41. Section 5.1 Exceptions to Contract (page 19). This section allows Respondent to propose exceptions to the “Form of Contract”. Please clarify what is meant by “Form of Contract”. Is Part 4 Terms Sheet which begins on page 9 considered the Form of Contract? Additionally, Section 5.1 references “see Prerequisites to located Form HUD 5370-A General Conditions for Construction Contracts”. Is Form HUD 5370-A General Conditions for**

## RFP# 2020-0150 – Enterprise Information Management (EIM) System Implementation Services

**Construction Contracts applicable for the consulting services being provided under this engagement? Or is there a different HUD Form that should be reviewed by Respondent?**

Answer: Yes, Part 4 – Terms Sheet substantially comprises the clauses that will be included in the successful firm’s contract. Please delete this sentence in its entirety – “Respondents’ proposed exceptions to the Form of Contract must be identified and submitted with the Respondents’ proposal. Proposed exceptions must not conflict with or attempt to preempt mandatory requirements and required HUD terms and conditions (see Prerequisites to located Form HUD 5370-A - General Conditions for Construction Contracts.)” REPLACE WITH - Respondents’ proposed exceptions to the Form of Contract must be identified and submitted with the Respondents’ proposal. Proposed exceptions must not conflict with or attempt to preempt mandatory requirements and required HUD terms and conditions.

- 42. Section 5.2 Contract Terms and Conditions (page 20). This section refers to “contract terms and conditions”. Please clarify what is meant by “contract terms and conditions” and whether or not Atlanta Housing will provide any specific contract terms and conditions in addition to Part 4 Terms Sheet for Respondent’s review.**

Answer: Part 4 – Terms Sheet are the contract terms and condition although not inclusive of all AH terms that may become a part of the contract. Most of the terms listed are contractually or legally required to be in AH’s contracts if federal funds are being utilized. All exceptions/objections to these terms should be stated in writing as an “Exception to Contract Terms” and submitted with the proposal response. After the Respondent has been recommended for award and approved by AH’s Board of Commissioners, any additional terms will be provided during negotiations.

- 43. How many Private Property Management companies does Atlanta Housing contract with to manage its properties?**

Answer: Atlanta Housing works with 36 Property Management companies. These companies do not enter data directly into any of our systems.

- 44. Are they required to use Yardi or any other Atlanta Housing systems? Or do they just provide summary reports?**

Answer: Only Atlanta Housing employees use our instance of Yardi. The response assumes that this question is part of question 20 above.

- 45. Has Atlanta Housing worked with consulting firm(s) in efforts leading to this RFP? If so, what firm(s)? If so, are such firm(s) eligible to participate in this RFP?**

Answer: Atlanta Housing utilized an outside firm (Mergence Global) to develop the EIM Strategy which will be shared with the contracted firm; however, the scope of work and all content outlined in the subject RFP were created solely by AH. All interested firms are eligible to participate in this RFP.

**ADDENDUM #1**

RFP# 2020-0150 – Enterprise Information Management (EIM) System Implementation Services

Addenda to this RFP will only be issued and posted on AH's website. Addenda **will not** be mailed to potential Respondents. It is the responsibility of the Respondent to monitor AH's website for any addenda issued. Each Respondent must acknowledge all addenda issued by completing and signing **Attachment 1 - Addenda Acknowledgement Form**. *The Form must be included in the Firm's response to the RFP.*

DocuSigned by:

*Albert Murillo*

491C5F51AA14437...

---

Albert Murillo

Senior Vice President, Contracts & Procurement