



**Request for Proposals #2021-0052  
Asset Management Software Solution**

**February 12, 2021**

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**Albert Murillo**  
**Senior Vice President, Contracts & Procurement**



# **Request for Proposals #2021-0052**

## **Asset Management Software Solution**

### **PART 1 – GENERAL INFORMATION**

#### **1.1 About Atlanta Housing**

The Housing Authority of the City of Atlanta, Georgia (“Atlanta Housing” or “AH”) is the largest housing authority in Georgia and one of the largest in the nation. AH provides and facilitates affordable housing resources for over 23,000 low-income households. These affordable housing resources include AH-owned residential communities, AH-sponsored mixed-income, mixed-finance residential communities, tenant-based vouchers, HomeFlex Program (formerly Project Based Rental Assistance Program), supportive housing arrangements, and homeownership opportunities.

Atlanta Housing has broad corporate powers including, but not limited to, the power to acquire, manage, own, operate, develop and revitalize affordable housing. AH’s programs are funded and regulated by the U.S. Department of Housing and Urban Development (“HUD”). Using its Moving to Work flexibility, AH has implemented a variety of innovations that benefit low-income families and expand housing choice. AH’s approach to providing quality affordable housing and human development services is based on the belief that people can do better when given access to quality living environments and the tools they need to become self-sufficient. To learn more about AH and its history, mission and business plan, Respondents are encouraged to visit AH’s website [www.atlantahousing.org](http://www.atlantahousing.org).

#### **1.2 Solicitation Purpose**

The Housing Authority of the City of Atlanta, Georgia (Atlanta Housing or AH) desires to enter into a contract with individuals or firms to provide an asset management solution for its Real Estate Asset Management Division to assist with the management of its real estate assets through acquisition, development, operations and disposition phases of the asset lifecycle. The ideal software will provide a single database for data management, document management, risk management, debt management, workflow management and reporting.

#### **1.3 Contract Term**

Contracts awarded from proposals received in answer to this solicitation will be for an initial term of one (1) year with the option to extend the contract, at Atlanta Housing’s sole discretion, for one (1) additional one (1) year option for a potential total maximum term of two (2) years.

#### **1.4 Schedule of Events**

The following is the Schedule of Events and is AH’s estimate of the timetable for this solicitation:

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<b>EVENTS</b>	<b>DATE AND/OR TIME</b>
<b>RFP Released</b>	<b>Friday, February 12, 2021</b>
<b>Pre-Proposal Conference</b> Date and Time <small>*Virtual Zoom Meeting Details</small>	<b>Thursday, February 18, 2021</b> <b>11:00 A.M. EDT</b>  <b>Via ZOOM:</b>  <b>Join Zoom Meeting</b>  <a href="https://atlantahousing.zoom.us/join/7959225449">https://atlantahousing.zoom.us/join/7959225449</a>  After registering, you will receive a confirmation email containing information about joining the meeting.
<b>Deadline for Questions and/or Comments</b>	<b>Monday, February 22, 2021 by 3:00 P.M., EDT</b>
<b>Proposal Due Date and Time</b>	<b>Thursday, March 11, 2021 by 3:00 P.M., EDT</b>

### **1.5 Communications**

In order to maintain a fair and impartial competitive process, AH and any outside consultants assisting AH with this solicitation, shall avoid private communication concerning this procurement with prospective Respondents during the entire procurement process. From the issue date of this RFP until the final award is announced, Respondents are not allowed to communicate about this RFP for any reason with any AH staff and/or outside consultants assisting AH with this solicitation except:

- through the RFP Point of Contact named below;
- as otherwise specified in this RFP; and / or
- as provided by existing work agreement(s) (if any)

Prohibited communication includes all contact, including but not limited to, telephonic communications, emails, faxes, letters, or personal meetings, such as lunch, entertainment, or otherwise. AH reserves the right to reject the quote of any Respondent violating this provision.

- A. All requests for information or clarification pertaining to this solicitation must be addressed in writing. **Questions must be submitted via the Q&A Board on AH's Business Management Portal.** AH will receive requests for additional information and/or clarification relative to this solicitation between **Friday, February 18, 2021 and 3:00 P.M. EST, Monday, February 22, 2021.**
- B. Responses to these questions will be addressed in writing via the AH's electronic procurement system. AH **will not** respond to requests for information after the date stated above. **It is the responsibility of the Respondent to monitor AH's website for any addenda issued.** All Respondents are encouraged to frequently check AH's website/portal for additional information.

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The sole Point of Contact for this RFP

Marie Spence  
Purchasing Analyst  
The Housing Authority of the City of Atlanta, Georgia  
Contracts & Procurement Department  
230 John Wesley Dobbs Avenue, NE 5<sup>th</sup> Floor  
Atlanta, Georgia 30303-2421  
[Marie.spence@atlantahousing.org](mailto:Marie.spence@atlantahousing.org)

Contact the Point of Contact for this RFP if there are questions relating to how to locate RFP on Atlanta Housing's website or on AH's Business Management Portal, if you need information on the upcoming preproposal conference or if you are experiencing technical difficulties with submitting your response. All other questions relating to the Scope of Work, requesting information to clarify details of the RFP and similar inquiries must be submitted on the Q & A Board.

## **PART 2 – SCOPE OF WORK**

### **2.1 Background**

The Asset Management Division provides operational and financial oversight to a portfolio of over 100 multifamily real estate assets that are managed and owned by third parties. The Asset Management function is currently managed via Microsoft Excel, Microsoft Word, Microsoft Teams, SharePoint, Access and Power BI. The Asset Management Division is seeking a Real Estate Software to provide an Asset Management solution for effective and efficient management of its real estate portfolio.

### **2.2. Scope of Work and Specific Requirements**

Atlanta Housing (AH) is seeking a real estate software firm to provide an asset management solution for its Real Estate Asset Management Division to assist with the management of its real estate assets through acquisition, development, operations and disposition phases of the asset lifecycle. The ideal software will provide a single database for data management, document management, risk management, debt management, workflow management and reporting. The system must be able to easily convert data from multiple third party data sources and/or accounting systems to a single data source to be used by the agency. The scope of work includes all areas of interest.

## **OVERALL FUNCTIONALITY**

The system must include the following:

- Provide interactive dash-boarding and reporting capabilities for multi-level end-users;
- Allows multiple users and has users access controls that can be controlled by AH;
- Ability to query data and generate AD-Hoc reports on-demand;
- Ability to generate workflow processes based on data uploads;
- Ability to create portfolio subcategories based on AH specific attributes such as owner affiliate, location, property type, etc.;
- Ability to customize property attributes;
- Automatic system upgrades at no additional costs throughout contract duration;

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- Provide in-depth training during implementation and provide additional training, as needed, throughout the duration of the initial contract term.
- Ability to interface with multiple software as a Service (SaaS) platforms or on-premises platforms, preferably via APIs or similar functionality;

Inclusion of the following reporting features is a plus:

- Secure portal that will allow collaboration with both internal and external users for data, document and information sharing.
- Ability to use Single Sign-On (SSO).

## **DATA MANAGEMENT**

Data management must include the following:

- Consolidate and map monthly trial balance reports from multiple data sources into a single chart of accounts;
- Consolidate and map annual audited financial statements and trial balances from multiple data sources into a consolidated, year-end financial report that reflects balance sheet and income statement activity;
- Confirm the trial balance and audited financial statements balance/reconcile prior to import into the system;
- Provide error alerts or notifications to users if there are any issues with data inputs;
- Ability to consolidate and track monthly occupancy information by unit classification such as total units, market rate units, AH-assisted units, and more (via dashboards, reporting, and more);
- Ability to store property level attributes such as:
  - o Property Profile: Picture(s) and complete property profile such name, owner entity name, property location with address validation, ground lease information, physical configuration, AH program type, target population, unit type and mix, acreage, year built, Low Income Housing Tax Credit (LIHTC) placed in service date, contact information for key stakeholders and more;
  - o Property Milestones: Loan Commitments, Equity Commitments, Subsidy Commitments, Development Milestones, Right of First Refusal Milestones (ROFR), Purchase Option Milestones (PO) and more;
  - o Ownership Structure:
    - General Partner (GP) and Limited Partner (LP) information
    - Ability to support complex deal and ownership structures and maintain record of ownership changes;
    - Ability to maintain record of GP and LP cash flow splits and more.
  - o Key Dates: LIHTC tax credit period, compliance period and extended use period dates, ROFR and PO trigger dates, PBRA Agreement expiration dates, AH Board Authorization periods and more.
- Ability to store information for real estate assets such as vacant land, unoccupied building(s), and commercial ground lease(s). Information shall include address, property type, various legal documents, ground lease payment information, and more.

Inclusion of the following data management features is a plus:

- Ability to track rental data, such as current and historical rental rates;

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- Consolidate operational data based on AH specific performance benchmarks from multiple data sources into consolidated reports.

**DOCUMENT MANAGEMENT**

Document management must include the following:

- Ability to store and retrieve key documents, preferably by document type. Key documents include:
  - o Deal structure documents such as Final Underwriting Model, Board Approvals, AH Commitment Letters, Rent Reasonableness Analyses, Intergovernmental Agreements, Certificates of Occupancy and more;
  - o Closing documents such as Partnership Agreements, Loan Agreements, HAP Contracts, Regulatory and Operating Agreements, Ground Lease Agreements, Land Use Restrictions Agreements, Management Agreements, Developer Agreements and more;
  - o Tax documents such as Final Cost Certifications, Forms 8609s, Forms 8823s and more;
  - o Agency generated documents such as PBRA Agreements and various approval memos;
  - o Monthly reports such as unaudited financial statements, rent rolls, and more;
  - o Annual reports such as audited financial statements and tax returns.

**RISK MANAGEMENT**

Risk management must include the following:

- Assess portfolio risk based on operational and financials metrics such as:
  - o Operational metrics based on key performance indicators such as occupancy, rent collections, bad debt as percentage of gross potential rent, net operating income, debt coverage ratio and various financial ratios, reserve balance(s), operating expense trends, deferred maintenance costs and more;
  - o Ability to create property level and portfolio level scoring metrics based on the information above.
- Ability to create a portfolio level watch-list for underperforming properties based on the above metrics.
- Ability to customize operational and financial metrics based AH-specific metrics.

Inclusion of the following data management features is a plus:

- Assess portfolio risk based on customize metrics such as:
  - o Operational Metrics based on AH's Moving to Work (MTW) benchmarks such as rent collections for AH-assisted units, occupancy of AH-assisted units, completion of routine and emergency work orders, compliance with AH work requirement, performance on annual on-site physical inspections conducted by AH, performance on annual tenant file inspections conducted by AH and more;
  - o Ability to include customized property level and portfolio level scoring metrics based on the information above.
- Ability to create a portfolio level watch-list for underperforming properties based on the customized metrics included above.

**DEBT AND FEE MANAGEMENT**

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Debt and fee management must include the following:

- Ability to store pertinent debt information such as lender, type of loan (i.e. HUD insured, conventional), original loan balance, loan priority, debt service payments (i.e. amortizing or available cash flow), interest rates, maturity date and current loan balance;
- Ability to store pertinent fee information for fees such as Asset Management Fees, Developer Fees, Incentive Fees and more. Software should have the ability to store how the fees are calculated and fee payment priority.

Inclusion of the following debt and fee management features is a plus:

- Ability to track loans that are not meeting debt service requirements;
- Ability to track key loan terms such as construction to permanent loan conversion milestones, events that trigger changes in the interest rate increases and events that trigger debt forgiveness;
- Ability to track loan and fee (i.e. asset management fees, developer fees, etc.) amounts due to AH by providing the following capabilities:
  - o Ability to invoice amounts due to AH and track receipt of payment;
  - o Ability to set automatic reminders and/or generate reports for outstanding payments that are not received within a specific timeframe, i.e. 30 days;
  - o Ability to set automatic notification reminders for collection of routine payments that are made to AH, such as annual ground lease and asset management fee payments and more.

### **WORK FLOW MANAGEMENT**

Work flow management must include the following:

- Ability for designated system administrator(s) to configure workflow assignments to assist with task management;
- Ability to assign tasks based on user type;
- Ability to provide users with the status of tasks such as notify users when tasks are coming up, ready to be worked on, in progress, past due, etc.
- Workflow should have the ability to inform users of all items in their queue for completion via query or automatic notification.

Inclusion of the following work flow management features is a plus:

- Workflow configurations to include time-stamping, real-time notifications, automatic audit trails, in-app communication and more;
- Workflow configurations to include an in-app approval process;
- Ability to assign task to multiple users and set multi-level approval order;
- Ability to track the status of tasks through the multi-level approval process;
- Ability to generate in-app letters and/or notices using standard letters templates create by AH.

### **REPORTING**

Reporting must include the following:

- Ability to generate on-demand and AD-Hoc reporting of financial information using trial balance data;
- Ability to generate risk assessment and watch-list reports using key performance benchmarks generated by AH;
- Ability to generate AD-Hoc reports using various property level attributes, such as property location, owner affiliation, year built, contact information and more;

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- Ability to generate AD-Hoc reports of key debt information such as by lender type, loan type, maturity date and more;
- Ability to generate a report of operating expense and rental rate trends over a period of time;
- Ability to generate portfolio occupancy reports;
- Ability to automatically generate and deliver routine reports to specified users (report scheduler).

Inclusion of the following reporting features is a plus:

- Ability to generate consolidated report of AH's MTW benchmarks.
- Ability to generate quarterly Executive Level portfolio summaries that include financial, operational and risk assessment data and more;
- Ability to generate of map that shows property location;

## **TRAINING REQUIREMENTS**

Training Requirements must include the following:

- Documentation of any succession plan(s), applicable training guides, manuals and/or videos (accessible to AH licensed users via the vendor website or embedded in the software application), and any additional training resources that will facilitate the successful transition of the project to an operational state;
- Live, interactive, and detailed train-the-trainer sessions for system administrators and all levels of end users that includes a demo/test site with instructor-led practical exercises for all end users to become familiar with the software and understand its basic functionalities;
- Being provided adequate training, user-guides/manuals, and videos (based on agreed upon training medium between AH and vendor) for instances of significant system upgrades that result in changes to the look, feel and/or functionality of the application. Significant changes include but are not limited to:
  - Removal of key features
  - New features/functions that changes the look, feel and/or function of the application
  - Changes in the workflow;
- Dedicated technical support professionals that are committed to assisting our system administrators with timely resolution of software failures/disturbances or loss of functionality indigenous to AH.

## **SECURITY REQUIREMENTS**

The system must include the following:

- Protection of personal data such as personally identifiable information (PII), vendor data, account data, etc. by reasonable security safeguards against such risks as loss or unauthorized access, destruction, use, modification or disclosure of data.
- Data transfers between the Asset Management software must be secured during the transfer between one or more systems using a secure protocol/method.

## **PART 3 – PROPOSAL EVALUATION**

### **3.1 Clean Hands Policy**

Procurement actions shall be conducted only with responsible contractors who have the technical and financial competence to perform, who have the fiscal responsibility in business dealings, and who have



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a satisfactory record of integrity. Before awarding a contract, AH shall review the proposed contractor's ability to perform the contract successfully, considering factors such as the contractor's integrity, compliance with public policy, record of past performance on AH and other jobs (including contacting previous clients of the contractor), and financial and technical resources. AH shall not award a new contract or conduct new business with a bidding contractor, vendor or applicant who (i) has past due financial obligations or indebtedness to AH pursuant to a contract or other transaction and has not fulfilled the obligation prior to submission of a bid, proposal or application for a contract, (ii) has an existing claim, demand, litigation action, investigation, hearing, or other legal, administrative, arbitral or similar proceeding or dispute against AH, whether civil or criminal (including any appeal or review of any of the foregoing) or (iii) in AH's reasonable discretion, has taken action that may give rise to or threatened to assert a claim, demand, litigation action, investigation, hearing, or other legal, administrative, arbitral or similar proceeding or dispute against AH, whether civil or criminal (including any appeal or review of any of the foregoing) or other dispute against AH. The President and Chief Executive Officer may waive the requirements of this paragraph for good cause shown as determined by the President and Chief Executive Officer and if it is otherwise in AH's best interests.

### **3.2 Submittals**

Proposals shall be submitted via AH electronic sourcing platform - Jagger. AH **will not** accept any proposal in part or in whole through any other means. The sections are as follows:

- A. Qualifications, Experience & Capacity
- B. Application Functionality & System Integration Capabilities
- C. Methodology, Approach & Project Timeline
- D. Cost
- E. Diversity Opportunity Plan

### **3.3 Evaluation Process, Evaluation Factors (Questions) and Award**

The proposal evaluating process is designed to award the contract, not necessarily to the Respondent(s) of least cost, but rather to the Respondent(s) whose proposal represents the best overall value as determined by an evaluation of the best technical score (a combination of qualifications and experience) and price/costs. Evaluations are based upon the evaluation factors and weights specifically established within this RFP.

Respondent(s) must provide all information outlined in the Evaluation Factors (as defined below) for the Respondent's proposal to be considered responsive. The quality of answers rather than length of responses to this RFP is important.

After evaluations, the Evaluation Committee will determine a competitive range. The competitive range includes the proposals that have a reasonable chance of being selected for award considering all aspects of the RFP. AH will negotiate with the Respondent(s) who fall within the competitive range. If required, only those Respondents within the competitive range may be selected for an oral presentation and/or interview.

The presentation/interview process will be arranged to assist the evaluation committee in differentiating those Respondents within the competitive range. Points may be added or deducted from the Respondent's preliminary score as deemed necessary by the evaluation committee. AH reserves the

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right to negotiate the final scope of services, price, schedule and any and all aspects of this solicitation with all Respondents in the competitive range.

Once negotiations are complete, AH shall establish a date and time for the submission of best and final offers. If a Respondent does not submit a notice of withdrawal of its offer, or a best and final offer, the Respondent’s immediate previous offer shall be construed as its best and final offer. The best and final offers shall be evaluated in essentially the same manner as the initial offers unless otherwise specified. The contract shall be awarded to the responsible Respondent whose qualifications, price and other factors considered are the most advantageous to AH.

The maximum points that shall be awarded for each of the Evaluation Factors are detailed and described below.

<b>Evaluation Factor (Question)</b>	<b>Items</b>	<b>Submitted Yes / No</b>	<b>Points</b>
A	Qualifications, Experience & Capacity	Required	25 Points
B	Application Functionality & System Integration Capabilities	Required	45 Points
C	Methodology, Approach & Project Timeline	Required	25 Points
D	Cost	Required	EVALUATED NOT SCORED
E	Diversity Opportunity Plan	Required	5 Points
	<b>Maximum Point Value</b>		<b>100 Points</b>

**The establishment, application and interpretation of the above Evaluation Factors (Questions) shall be solely within the discretion of AH.** AH reserves the right to determine the suitability of proposals on the basis of all of these factors.

**EVALUATION FACTORS (QUESTIONS) DESCRIPTIONS**

The maximum points that shall be awarded for each of the Evaluation Factors are detailed and described below.

**Evaluation Question A**

**Qualifications, Experience & Capacity..... 25 Points**

- Respondent must outline its qualifications and experience. To respond to this question, the Respondent must meet the requirements by describing demonstrated past performance on similar projects of comparable scope and provide performance guarantees. Additionally, Respondents must demonstrate its knowledge of the financial and operational aspects of affordable multi-family real estate developments as it relates to the capabilities of the proposed software solution.
- Respondent shall provide at least five (5) public housing authorities or comparable clients that have a portfolio of at least 50 affordable multi-family developments to whom you have provide a real estate asset management software solution within the last three (3) years. *Please note that*

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*AH cannot be used as reference; points will not be given for any firm providing AH as a reference.*

- Respondent shall provide the professional qualifications, such as experience with and knowledge of various aspects of affordable multi-family real estate developments, of its team members and/or committed personnel. If using a subcontractor, provide the length of time worked together and resumes for key subcontractor personnel.

**Evaluation Question B**

**Application Functionality & System Integration Capabilities.....45 Points**

1. Respondent shall describe in detail its ability to provide a software solution with the capabilities and features outlined in the Scope of Work – Functional and Technical Requirements.
2. Respondent shall provide a thorough description of the software’s ability to track and monitor the financial and operational performance of affordable multi-family real estate assets, including the preparation of routine and ad-hoc reports for various types of end users.
3. Respondent shall describe the system’s ability to store property level information including various documents (i.e. legal documents) by property.
4. Respondent shall describe the proposed software solution and its ability to transition assets through the acquisition, development, operating and disposition stages of the assets’ lifecycle.
5. Respondent shall describe the system’s ability to expand use to accommodate multiple internal users across AH departments. Respondent should detail software’s user access controls that can be implemented in connection with the accommodation of multiple internal users.
6. Respondent shall provide sample reports produced by the proposed real estate asset management software solution.
7. Respondent shall provide any additional information that distinguishes your real estate asset management software solution from other available software products.
8. Respondent shall describe the training method(s) to be used throughout the duration of the contract and provide sample training material.

**NOTE:** Respondent must be willing to conduct demonstrations of the software solution. After the initial demonstration, AH may request subsequent demonstrations to address additional questions and/or invite additional AH end-users and system administrators.

**Evaluation Question C**

**Methodology, Approach & Project Timeline..... 25 Points**

AH wants to ensure that the Respondent has the capacity and infrastructure (including dedicated personnel) to implement the software within 90 days of contract execution.

1. Respondent must provide a proposed organizational chart for the project, outlining Respondent’s dedicated personnel. Additionally, provide a description of the methodology, approach and project plan you will use to implement the software. The methodology, approach and project plan must describe the process of uploading AH’s existing real estate assets into the system.
2. Respondent will also provide a Business Systems Analyst to map AH business processes and the proposed software processes.
3. Respondent must describe and implement a training program to teach the skills necessary to effectively use the software. The information must include:

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- a. Detailed training method for AH end users and system administrators;
  - b. Detailed implementation and training plan, included estimated time-frame and deliverables for each stage of training; and
  - c. Expected number of AH staff hours required at different stages of the implementation process.
4. Methodology and approach to training and ongoing support for end users and/or system administrators post- implementation.

**Evaluation Question D**

**Cost Structure .....Evaluated NOT SCORED**

The fee proposal format is set-up such that Respondents can provide pricing on the clearly defined scope, provide rates and/or pricing models for scope to be defined in the future as well as provide additional services outlined in the fee proposal document. Respondents must provide sufficient detail about the structure of its fee proposal to enable the evaluation committee adequate information to evaluate the value of the overall costs of the proposal. The fee proposal form provides guidelines for providing costs; however, if the Firm’s pricing structure for the services is presented in another format, please use the text box on the fee proposal form or utilize a separate sheet to provide your pricing structure.

The Respondent must provide sufficient detail about the training structure and its associated costs. The fee proposal must outline costs associated with the training method(s) and must include total training hours allotted, number and billing rate for dedicated training staff, cost of live interactive training and cost of applicable training guides, manuals and/or videos.

Respondent shall identify its pricing for the Services using the fee Proposal identified in the proposal any licensing fees, permit costs, printing costs and any other reimbursable items that are the responsibility of the Respondent and can be negotiated during the issuance of a task order. Please note, that travel expenses outside of the Atlanta metropolitan area and per diem (hotel, meals, etc.) are not considered reimbursable expenses under this contract. AH may make an exception to this condition if any unforeseen needs arise.

**Evaluation Question E**

**Diversity Opportunity Plan.....5 Points**

AH shall, to the greatest extent feasible, make every effort to ensure that small businesses, minority owned and women-owned businesses, and labor surplus area businesses, and other individuals or firms located in or owned in substantial part by persons residing in the area of AH-owned communities are used when possible in AH’s contracting opportunities.

Respondent is encouraged to provide a contracting/employment opportunity plan, noting the potential jobs and subcontracting opportunities that will be made available by Respondent for the services to be provided. Please provide relevant and applicable W/MBE certifications or provide a contracting/employment opportunity plan.

**MAXIMUM TOTAL POSSIBLE POINTS.....100**

**3.4 Responsibility Determination**

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The responsibility determination includes consideration of a Respondent's record of integrity and business ethics, compliance with public policy, past performance with AH (if any) and other entities, financial capacity, and eligibility to perform government work (e.g., debarment/suspension from any Federal, State, or local government). AH reserves the right to perform whatever research it deems appropriate in order to assess the merits of any Respondent's proposal and utilize the information gathered in the final evaluation of those firms in competitive range.

**a) Financial Capacity Determination**

AH shall make an assessment of the Respondent's financial capacity, that is, whether in the sole opinion of AH, the Respondent is capable of undertaking and completing the RFP scope of work delineated within this RFP in a satisfactory manner. AH will award a contract only to the responsible Respondent who, in AH's sole opinion, has the financial ability to successfully perform under the terms of this RFP. AH's determination will include an assessment of the Respondent's financial resources/ability to perform the scope of work in accordance with the RFP requirements.

Respondents who make the competitive range may be asked to submit financial information. Failure by the Respondent to provide such information within the allotted time will render the Respondent ineligible for award.

**b) Technical Capacity Determination**

AH will conduct a survey relating to the Respondent's record of performance on past and present projects that are similar to the scope of work identified in this RFP, which may include services/projects not identified by the Respondent. AH reserves the right to perform whatever research it deems appropriate in order to assess the merits of any Respondent's proposal. Such research may include, but not necessarily be limited to, discussions with outside Respondents, interviews and site visits with the Respondent's existing clients and analysis of industry reports. AH will make a finding of the Respondent's Technical Resources/Ability to perform the RFP scope of work based upon the results of the survey.

A Respondent will be determined responsible if AH determines that the results of the Technical Resources/Ability survey reflect that the Respondent is capable of undertaking and completing the RFP scope of work in a satisfactory manner.

AH reserves the right to award this contract to one Respondent, to make multiple awards and to award without discussions. AH may reject any or all offers if such action is in AH's interest, award contract other than to the lowest Respondent, waive informalities and minor irregularities in offers received, and award all or part of the requirements stated.

Proposals that are considered nonresponsive will not receive consideration. AH reserves the right at any time during the evaluation process to reconsider any proposal submitted. It also reserves the right to meet with any Respondent at any time to gather additional information. Furthermore, AH reserves the right to delete, add or modify any aspect of this procurement through competitive negotiations up until the final contract signing.

**PART 4 – TERMS SHEET**

**4.1 Compliance with E-Verify**

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In compliance with O.C.G.A. §§ 13-10-90 and 13-10-91, effective July 1, 2013, *before AH can consider* Respondent's proposal for the services requested, Respondent must register and participate in the federal work authorization program operated by the United States Department of Homeland Security, commonly known as E-Verify, to verify employment eligibility information of newly hired employees and must continue to participate in E-Verify during the term of the contract. Such participation is evidenced by submitting to AH a signed affidavit in the form of the affidavit either provided by Georgia Department of Audits and Accounts or approved by AH ("E-Verify Affidavit") – see **Prerequisites** – State of Georgia Contractor E-Verify Affidavit. The E-Verify Affidavit is Respondent's certification that it has registered with, is authorized to use and uses the federal work authorization program.

Respondent further certifies that all tiers of contractors and subcontractors hired by Respondent to perform the services under the agreement are compliant with E-Verify; that Respondent will continue to use E-Verify throughout the term of the contract; that Respondent and all tiers of its contractors and subcontractors will only contract with other contractors and subcontractors who present an E-Verify Affidavit, or the appropriate documentation in lieu of the E-Verify Affidavit; and that Respondent will submit the appropriate affidavits and other documents to AH from it and all tiers of contractors and subcontractors, as required.

#### **4.2 Licenses, Permits and Certifications**

Before a contract pursuant to this RFP is executed, the apparent successful Respondent(s) must hold all necessary, applicable professional licenses required by the State of Georgia and all other regulatory agencies necessary to complete the Services. The Respondent shall obtain, at the Service Provider's expense, any permits, certificates and licenses as may be required in the performance of the work specified. All required licenses shall remain active and valid during the entire duration of the subsequent contract. AH may require any or all Respondents to submit evidence of proper licensure.

#### **4.3 Atlanta Housing Opportunity Inclusion Policy (OIP)**

It is the policy of Atlanta Housing that Minority, Women and Small Business Enterprises (MBE/WBE/SBE) as defined in regulations developed by the Secretary of the Department of Housing and Urban Development (HUD) and promulgated in 2 CFR 200, the National Affordable Housing Act 42 U.S.C 12703, and HUD Procurement Handbook for Public Housing Agencies No. 7460.8 Rev.2, the United States Small Business Administration and other governmental and professional industry association certifying agencies) shall have the maximum opportunity to participate in the performance of contracts financed in whole or in part with federal funds and that bidders, proposers or contractors and their subcontractors or suppliers shall take all necessary and reasonable steps to ensure that MBE/WBE/SBEs shall have the maximum opportunity to compete for and perform contracts financed in whole or in part by federal funds.

MBE/WBE/SBE economic participation shall be implemented through Atlanta Housing's Opportunity Inclusion Policy via an MBE/WBE/SBE Utilization Plan that is submitted by entities seeking to do business with Atlanta Housing or its partners who utilize federal funding in whole or in part.

Accordingly, businesses intending to respond to this RFP shall be a certified MBE/WBE/SBE or agree to expend no less than 35% of the total contract price, inclusive of all modifications and amendments through work with certified MBEs and WBEs. AH business partners that are certified not-for-profit/non-profit entities shall agree to expand not less than 20% of their contract value via MBE/WBE/SBE.

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Respondents who, as a result of a robust, timely and documented process of solicitation to the marketplace to meet this requirement, find that it is not possible to secure that level of participation, may augment their MBE/WBE/SBE participation goal with a comprehensive detail of good faith efforts. Documented good faith efforts will be considered on their merits and in light of other respondents and their plans regarding impracticability of meeting the published goals. In RFQ submissions of qualifications, an affidavit of future compliance will evidence intended compliance. For proposals submitted as a response to RFP's a written plan to achieve the published aspirational goal will be required with initial proposal or subsequent task orders. RFP respondents may submit partial plans to comply with aspirational goals so long as they are accompanied with a detail of best efforts that support the impracticability of the aspirational goal with a request for partial waiver.

#### **4.4 Atlanta Housing Section 3 Policy**

Section 3 of the Housing and Urban Development Act of 1968, as amended (12 U.S.C. 1701 u) requires that AH ensure that employment and other economic and business opportunities generated by HUD financial assistance, to the greatest extent feasible, are directed to public housing residents and other low-income persons, particularly recipients of government housing assistance, and business concerns that provide economic opportunities to low and very-low income persons.

AH is committed to utilizing residents and other Section 3 eligible persons and businesses in contracts partially or wholly funded with funds from HUD. It is the responsibility of contractors, vendors and suppliers to implement progressive efforts to attain Section 3 compliance. The Respondent will be required to submit with their proposal either a Contract Compliance Affidavit (Schedule A) or a measurable Section 3 Action Plan via MWBE & Section 3 Business Utilization Plan (Schedule B) to include training, employment, contracting and other economic opportunities throughout all phases of the development work. The Action Plan should include a brief description of the job opportunities, business opportunities and/or training for Section 3 eligible participants. Some examples of opportunities include word processing, payroll, research, accounting, landscaping, painting, carpentry, and catering, to name a few. As contractors, Respondents will be expected to report on the progress of its Section 3 Action Plan on a quarterly basis, or as otherwise requested by AH. All Respondents to this RFP are required to comply with the requirements of Section 3, (Schedule A) - Contract Compliance Affidavit, as applicable.

#### **4.5 Certification Regarding Debarment**

The Respondent certifies by submission of its offer, that neither it nor its principals is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by a Federal department or agency. All Respondents are required to submit a Disclosure Statement if this is not the case.

#### **4.6 Respondents' Status**

The Respondent and its agents will be held to be an independent contractor, and will not be an employee of AH.

#### **4.7 Funding Limitations**

This procurement may be funded, in whole or in part, by grant funds provided by the U. S. Department of Housing and Urban Development. AH will not be bound to any contract if funding has been disallowed by HUD.

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#### **4.8 Government Restrictions**

In the event any governmental restrictions may be imposed which would necessitate alteration of the material, quality, workmanship or performance of the goods or the material, quality, workmanship or performance of the goods or services offered, it shall be the responsibility of the successful Respondent to immediately notify AH in writing specifying the regulation which requires an alteration. AH reserves the right to accept any such alteration, including any reasonable price adjustments occasioned thereby, or to terminate the contract at no expense to AH.

#### **4.9 Insurance**

Contractor will be required to obtain and maintain the following insurance coverages during the entire contract period:

##### **A. Minimum Limits and Coverage**

- I. Worker's Compensation and Employer's Liability with the following minimum limits and coverage:
  - a. Workers Compensation- Statutory Limit in accordance with the laws of the State of Georgia
  - b. Employer's Liability:
    - \$500,000 bodily injury for each accident
    - \$500,000 bodily injury by disease for each employee
    - \$500,000 bodily injury disease aggregate
  
- II. Commercial General Liability with the following minimum limits and coverage:
  - a. \$1,000,000 combined single limit for each occurrence for bodily injury/property damage
  - b. AH must be listed as an additional insured
  
- III. Automobile Liability with the following minimum limit and coverage:
  - a. \$1,000,000 combined single limit each accident.
  - b. Coverage shall be for any auto (including owned, hired, and non-owned autos)
  - c. AH must be listed as an additional insured
  
- IV. Professional Liability / Errors & Omissions (if required)
  - a. Professional Liability / Errors & Omissions insurance in the amount of not less than \$1,000,000 per claim, unless otherwise required by AH.
  
- V. Cyber-Liability Insurance Requirements

In addition to having favorable cyber-risk controls and processes in place, Consultant shall have **Cyber Liability Insurance** with coverage to protect Atlanta Housing, including both first and third party coverage, with limits not less than \$2,000,000 per occurrence or claim and \$3,000,000 aggregate. Coverage shall be sufficiently broad to respond to the duties and obligations as are



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undertaken by Consultant in this agreement and shall address network security wrongful acts; privacy wrongful acts; crisis/breach management expenses; regulatory proceedings expenses; media/content liability expenses; digital asset expenses; business interruption costs; and cyber extortion and reward payments. The policy shall cover, but not be limited to, claims involving infringement of intellectual property, infringement of copyright, invasion of privacy or breach of privacy violations, release of private or personally identifiable information, breach of data, cost of data recovery, unauthorized access to data or systems, information theft, damage to or destruction of electronic information, alteration of electronic information, electronic theft, telecommunications fraud, computer fraud, social engineering fraud, cyber deception, fraudulently induced transfers, ransomware, malware, extortion, and network security. The policy shall provide coverage for breach response costs, regulatory fines and penalties, and credit monitoring expenses, with limits sufficient to respond to these obligations.

**Contractor shall provide certificates of insurance to AH prior to execution of the contract and at the beginning of each option term.**

**B. Additional Requirements**

AH reserves the right to require the Contractor to provide certified copies of such policy or policies. Each such policy will not be canceled or materially changed or altered without first giving 30 days' written notice thereof to AH's Director, Contracts & Procurement, 230 John Wesley Dobbs Avenue, NE, 5<sup>th</sup> Floor, Atlanta, Georgia 30303-2421, sent by certified mail, return receipt requested.

Certificate(s) of Insurance shall be provided to AH evidencing that all coverage, limits and endorsements required herein are maintained and in full force. AH shall be listed on the Certificate as an additional insured as noted in the above coverage requirements.

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.

Contractor agrees, and hereby authorizes its insurer, to notify AH of any substantial change in such insurance coverage described herein. Substantial change includes, but is not limited to, events such as cancellation, non-renewal, reduction in coverage, or receipt of a claim against such coverage with a potential recovery in excess of 20% of available coverage.

The premium cost of all insurance purchased by the Contractor for protection against risks assumed by virtue of the contract shall be borne by the Contractor and is not reimbursable by AH.

AH 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, AH 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.

**4.10 Indemnification**

AH is defined in this section to include AH Commissioners, employees, agents **and/or** assigns. Contractor agrees to indemnify AH and hold it harmless from and against any and all claims, liabilities, damages, losses, costs or expenses, including, without limitation, reasonable attorney fees arising out of or related to (a) a breach of the contract by Contractor or (b) the performance of the Services, whether

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by Contractor, a subcontractor, or anyone directly or indirectly employed by them or anyone for whose acts they may be liable, regardless of whether or not such claim, liability, damage, loss, cost or expense is caused by the gross negligence or willful misconduct of a party indemnified hereunder. Contractor's indemnification obligation shall not be limited by a limitation on amount or type of damages, compensation or benefits payable by or for Contractor or subcontractor under any insurance required by the contract, including workers' compensation acts, disability benefit acts, other employee benefit acts, or any other insurance. Contractor shall not settle or compromise any indemnifiable claims hereunder without the prior written consent of AH.

AH cannot and does not agree to indemnify, hold harmless, exonerate or assume the defense of Contractor or any other person or entity whatsoever, for any purpose whatsoever.

#### **4.11 Compliance with Laws**

**a) AH is legally obligated, as applicable, to require these provisions in its contract.**

Contractor and its employees, agents, and subcontractors shall comply with all applicable Federal, State, and local laws, rules, ordinances, regulations and orders applicable to the work described herein, including, but not limited to, those applicable laws, regulations and requirements governing equal employment opportunity strategies, subcontracting with small and minority firms, women's business enterprise, and labor surplus area firms, equal opportunity for businesses and unemployed and underemployed persons (as referenced in Section 3 of The Housing and Urban Development Act of 1968, as amended, 12 U.S.C. 1701u ("Section 3"), the Americans with Disabilities Act, Section 504 of the Rehabilitation Act of 1973, the Davis-Bacon Act, and those laws and regulations concerning the abatement and remediation of asbestos and lead-based paint, and shall provide for such compliance in the contract documents. To the extent the work required under this contract is related to development, Contractor shall further comply with the applicable Annual Contributions Contract ("ACC") related to such development. To the extent such work is related to a mixed finance development, Contractor shall comply with the provisions of 24 CFR § 941.208.

**b) HUD Section 3 Compliance:**

1) The services to be performed under the contract are subject to the requirements of Section 3 of the Housing and Urban Development Act of 1968, as amended, 12 U.S.C. 1701u ("HUD Section 3"). The purpose of HUD Section 3 is to ensure that employment and other economic opportunities generated by HUD assistance or HUD-assisted projects covered by HUD Section 3, shall, to the greatest extent feasible, be directed to low and very low-income persons, particularly persons who are recipients of HUD assistance for housing.

2) The Parties hereby agree to comply with HUD's regulations in 24 CFR Part 135, which implement HUD Section 3 (the "Implementing Regulations"). As evidenced by their execution of this contract, the parties to the contract certify that they are under no contractual or other impediment that would prevent them from complying with the implementing Regulations.

3) Contractor agrees to send to each labor organization or representative of workers with which Contractor has a collective bargaining agreement or other understanding, if any, a notice advising the labor organization or workers' representative of Contractor's commitments under this HUD Section 3 clause, and will post copies of the notice in conspicuous places at the work site where both employees and applicants for training and employment positions can see the notice. The notice shall describe the

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HUD Section 3 preference, shall set forth minimum number and job titles subject to hire, availability of apprenticeship and training positions, the qualifications for each; and the name and location of the person(s) taking applications for each of the positions; and the anticipated date the Services shall begin.

4) Contractor will certify that any vacant employment positions, including training positions, that are filled one (1) after Contractor is selected but before the contract is signed, and (2) with persons other than those to whom the Implementing Regulations require employment opportunities to be directed, were not filled to circumvent the contractor's obligations under the Implementing Regulations.

5) Noncompliance with HUD's regulations in 24 CFR part 135 may result in sanctions, termination of this contract for default, and debarment or suspension from future HUD assisted contracts.

6) With respect to work performed in connection with Section 3 covered Indian housing assistance, section 7(b) of the Indian Self-Determination and Education Assistance Act (25 U.S.C. 450e) also applies to the work to be performed under this contract. Section 7(b) requires that to the greatest extent feasible (i) preference and opportunities for training and employment shall be given to Indians, and (ii) preference in the award of contracts and subcontracts shall be given to Indian organizations and Indian-owned Economic Enterprises. Parties to this contract that are subject to the provisions of Section 3 and section 7(b) agree to comply with Section 3 to the maximum extent feasible, but not in derogation of compliance with section 7(b).

**c) Energy Efficiency**

Contractor will comply with all standards and policies relating to energy efficiency which are contained in the energy conservation plan issued in compliance with the Energy Policy and Conservation Act (Pub.L. 94-163) for the State in which the Services are performed.

**d) Clean Air and Clean Water**

For contracts in excess of \$100,000, Contractor must comply with all applicable standards, orders, or requirements issued under section 306 of the Clean Air Act (42 USC 1857 (h)), section 508 of the Clean Water Act (33 USC 1368), Executive Order 11738, and Environmental Protection Agency regulations 40 CFR part 15.

**e) Equal Employment Opportunity**

Contractor, during the performance of the contract, shall not discriminate against any employee or applicant for employment because of race, color, religion, sex, or national origin. Contractor shall comply with applicable federal and state non-discrimination and equal opportunity laws, rules, regulations and executive orders.

**f) Anti-Lobbying**

1) Contractor will not use federally- appropriated funds that have been paid or will be paid, by or on behalf of Contractor, for the purpose of influencing or attempting to influence any officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, or the extension, continuation, renewal, amendment or modification of any Federal contract, grant, loan or cooperative agreement.

2) Contractor agrees to disclose any conflict as soon as such conflict becomes known or should have become known.

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3) Contractor agrees to include the language of this subsection in the award documents for sub-awards at all tiers (including subcontracts, sub-grants, and contracts under grants, loans and cooperative agreements) and that all sub recipients and subcontractors shall acknowledge and disclose accordingly.

**4.12 Termination for Convenience and Default**

a) AH may terminate the contract, in whole or in part, for AH's convenience by delivering to Contractor a written notice of termination specifying the nature, extent, and effective date of the termination. Upon receipt of the notice, Contractor shall: (i) immediately discontinue all Services affected (unless the notice directs otherwise); and (ii) deliver to AH all information, reports, papers, and other materials accumulated or generated in performing the Services, whether completed or in process.

b) Either Party may terminate the contract upon the material breach of the contract by the other Party, which breach is not cured within 30 calendar days following written notice thereof; provided, however, that if such breach is not susceptible to cure the non-breaching Party may terminate the contract immediately upon written notice thereof to the breaching Party. For avoidance of doubt, any materially false, deceptive, incorrect or incomplete statement, representation or certification by Contractor in connection with the contract or in the RFP process shall constitute a material breach that is not susceptible to cure by Contractor. Upon the termination of the contract by AH pursuant to this subsection, Contractor shall: (i) immediately discontinue all Services affected (unless the notice directs otherwise); and (ii) deliver to AH all information, reports, papers, and other materials accumulated or generated in performing the Services, whether completed or in process.

c) If the termination is for the convenience of AH, then AH shall be liable only for payment for Services rendered before the effective date of the termination. In arriving at the amount due Contractor for a termination for convenience, in no event shall the payment to Contractor exceed the aggregate price set forth in the contract and there shall be deducted:

- (i) all progress payments to Contractor under the terminated portion of the contract, and
- (ii) any claim which AH has against Contractor under the contract.

d) If the termination is due to breach by Contractor, AH may (i) require Contractor to deliver to it, in the manner and to the extent directed by AH, any work as described in subparagraph (b) above; (ii) take over the work and prosecute the same to completion by contract or otherwise, and Contractor shall be liable for any additional cost incurred by AH; and (iii) withhold any payments to Contractor, for the purpose of off-set or partial payment, as the case may be, of amounts owed to AH by Contractor.

e) If, after termination for breach by Contractor, it is determined that Contractor had not in fact breached the contract, the termination shall be deemed to have been effected for the convenience of AH, and Contractor shall be entitled to payment as described in subparagraph (c) above.

f) Contractor agrees that upon termination of the contract for any reason, it shall provide sufficient efforts and cooperation to ensure an orderly and efficient transition of the Services to AH or another contractor. Contractor shall provide full disclosure to AH and the third-party contractor about the equipment, software, or services required to perform the Services for AH.

**4.13 Disputes**

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- a) The Parties agree to attempt to resolve all disputes and misunderstandings that may arise under or relating to the contract by agreement of the Parties or through amicable negotiations.
- b) All claims by Contractor shall be made in writing and submitted to AH. AH shall, with reasonable promptness, but in no more than 30 calendar days, render a decision concerning any claim hereunder. Unless Contractor, within 20 calendar days after receipt of AH's decision, shall notify AH in writing that it takes exception to such decision, the decision shall be final and conclusive. Contractor shall proceed diligently with performance of the contract, pending decision from AH concerning any claim hereunder.
- c) If Contractor does not agree with the decision of AH, Contractor may pursue other legal means to resolve such claim. The venue of any action brought under the contract shall be in the Superior Court of Fulton County, Georgia.

**4.14 Examination and Retention of Contractor's Records**

- a) Contractor shall maintain, during the performance of the contract, and for a period of at least three years following the date of final payment under the contract, all of Contractor's books, documents, papers and other records, including electronic records, involving transactions related to the contract for the purpose of making audit, examination, excerpts, and transcriptions. AH, the United States Department of Housing and Urban Development ("HUD"), or Comptroller General of the United States, or any of their duly authorized representatives, shall, until three years after final payment under the contract, have access to and the right to examine all such books, documents, papers and other records, including electronic records.
- b) Contractor agrees to include in first-tier subcontracts under the contract a clause substantially the same as subsection (a) above. "Subcontract," as used in this section, excludes contracts not exceeding \$10,000.
- c) Notwithstanding anything to the contrary set forth in this section, the periods of access and examination in subsection (a) above shall continue until final disposition of any appeals, litigation, claims or exceptions related thereto that were commenced prior to the expiration of such three-year period.

**4.15 Ownership Rights in Works**

All data, materials, documentation, computer programs, inventions (whether or not patentable) and works of authorship created or developed in whole or in part by Contractor during the contract period in connection with the performance of the Services hereunder (collectively, "Works") shall be considered work made for hire by Contractor and owned by AH. Works shall not be reproduced or used by Contractor without the express written consent of AH. Contractor shall execute all documents and take all actions necessary to vest ownership of the Works in AH.

**4.16 Intellectual Property**

Contractor agrees it will not use the name or any intellectual property of AH, including but not limited to, AH copyrights, trademarks or logo in any manner, including commercial advertising or use as a business reference, without the prior written consent of AH.

**4.17 Confidential Information**

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AH may provide Contractor with information owned by or relating to AH and its business, including, without limitation, its operations, business plans, personnel, or financial matters, all of which is hereby designated as confidential and proprietary by AH (“Confidential Information”). Contractor agrees to only use AH’s Confidential Information to the extent necessary to perform the Services as contemplated herein. During the Contract Period and for two years following the expiration or earlier termination thereof, Contractor shall keep confidential and shall not publish or otherwise disclose, or permit its employees, subcontractors and assigns to publish or otherwise disclose, any of AH’s Confidential Information without AH’s prior written approval; provided that to the extent such Confidential Information constitutes a trade secret under applicable law, such covenants shall continue for so long as such Confidential Information so constitutes a trade secret. At a minimum, Contractor shall carry out its obligations hereunder using the degree of care that it uses in protecting its own confidential and proprietary information of similar importance. All Confidential Information is and shall remain AH’s property and Contractor shall return such Confidential Information, and all embodiments thereof, to AH upon expiration or termination of the contract or upon the earlier request of AH. Contractor agrees that all of its employees and subcontractors will, upon AH’s request, sign a confidentiality statement, in a form approved by AH in its reasonable discretion, in which such employees and subcontractors agree to be bound by the restrictions set forth in this section. The following types of information shall not be subject to the requirements of this section: (a) information which is or becomes known to the public through no act or omission of Contractor; (b) information which Contractor can demonstrate was in its possession prior to the execution of the contract (and was provided by a source other than AH); (c) information which Contractor developed independently from any relationship with AH; and (d) information which Contractor acquired from a third party which did not violate any obligation of confidentiality or trust by disclosing such information.

**4.18 Conflicts of Interest**

AH is contractually obligated to ensure compliance with this provision. Contractor agrees to notify AH if any of the following persons enter into an agreement with Contractor while such persons are in the roles listed below or within one year after termination of such roles and further certifies that Contractor is not:

- a) A member or officer of AH's Board of Commissioners or an \*immediate family member of an officer of AH’s Board of Commissioners. This prohibition does not include any present or former resident commissioner who does not serve on the governing body of a resident corporation, and who otherwise does not occupy a policymaking position with the resident corporation, AH, or a business entity.
- b) Any AH employee who formulates policy or who influences decisions with respect to AH’s projects, or any member of the employee's \*immediate family, or the employee's partner.
- c) Any public official, member of the local governing body, or State or local legislator (including members of the City of Atlanta City Council, Fulton County Board of Commissioners, DeKalb County Board of Commissioners, or Georgia legislator), or any member of such individuals' \*immediate family, who exercises functions or responsibilities with respect to AH’s projects.
- d) A member of or delegate to the Congress of the United States of America or a resident commissioner (defined as an individual appointed to oversee a territory or possession of the United States of America, such as Guam).

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\* *"Immediate family member"* means the spouse, mother, father, brother, sister, or child of a covered class member whether related as a full blood relative, or as a "half" or "step" relative (e.g., half-brother or stepchild).

Contractor agrees to notify AH in writing if it has, during the course of the contract, any organizational conflict of interest, which is defined as a situation in which the nature of work under the contract and a Contractor's organizational, financial, contractual or other interests are such that award of the contract may result in an unfair competitive advantage or Contractor's objectivity in performing the Services may be impaired.

The terms of this section shall be included in all subcontracts entered into by Contractor in connection with the contract.

At all times while Contractor is conducting business with AH, it is required to disclose in writing, any direct or indirect conflicts of interest and any organizational conflicts of interest as soon as such conflict becomes known or should have become known. If Contractor has a conflict of interest, it must provide a full and complete disclosure, in writing, to AH's Vice President, Acquisition & Management Services. The Disclosure Statement must be presented on Contractor's letterhead, notarized and signed by the individual making the disclosure.

**4.19 Prohibition against Gifts/Favors/Anything of Monetary Value**

No AH employee can accept or solicit for themselves or for others, anything of value from Contractor or any person, corporation, or other entity doing business with or attempting to do business with AH. The term "anything of value" includes, but is not limited to, gifts, money, property, meals, favors, personal benefit, entertainment, loans, or promises. Contractor shall report any violation of this prohibition immediately to the Director, Contracts and Procurement, 230 John Wesley Dobbs Avenue, 5th Floor, Atlanta, Georgia 30303-2421.

**4.20 Assignment**

Contractor may not assign the contract or any part thereof, or assign any of the monies to be paid thereunder, or assign or delegate any of its rights, duties or obligations under the contract to any other party, whether by operation of law or otherwise, without the prior written consent of AH. In the event Contractor subcontracts the performance of any of the Services to a third party approved by AH in accordance with this section, Contractor and each subcontractor shall enter into a subcontracting agreement in such form as approved by AH in its sole discretion, which form shall include, without limitation, all required provisions set forth in the contract. Any purported assignment in violation of this section shall be null and void. In its sole discretion, AH reserves the right to refuse approval of any assignment. During the contract term, Contractor is obligated to notify AH if the name or corporate structure changes, including any merger, acquisition, sale, restructuring or other transaction that renders the legal entity name or federal employer identification number different. Contractor agrees to provide sufficient documentation to AH to document such change in the legal entity name or federal employer identification number.

**4.21 Non-Exclusive Rights**

The resulting contract is not exclusive. AH reserves the right to select other contractors to provide services similar to the Services described in the contract during the contract period.

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**4.22 Contract Modification**

AH reserves the right to increase or delete any scheduled items, and/or increase or reduce the quantity of any scheduled item as deemed necessary, and to make other changes and modifications consistent with AH's policies and applicable local, State and Federal laws.

**4.23 Governing Law**

The contract will be governed by and construed in accordance with the laws of the State of Georgia, without giving effect to principles of conflict of laws.

**4.24 Required AH Vendor Registration**

**In order to do business with AH, Respondent must be a registered vendor prior to submitting a response.** Please refer to the following Internet URL for more information about Vendor Registration and to register on-line – <http://www.atlantahousing.org/business/vendors>. If Respondent has already registered with AH, the Respondent's (Vendor) profile must be up-to-date. Respondent is responsible for contacting their local city and county authorities (usually the Clerk of the Superior Court's Office) and the State of Georgia (Secretary of State's office – [www.sos.georgia.gov](http://www.sos.georgia.gov)) to ensure that Respondent has complied with all laws and is authorized and/or licensed to do business in Georgia. All applicable fees associated therewith are the responsibility of Respondent now or hereafter in effect during the contract. Respondent and its employees, agents and subcontractors shall also comply with all Federal, State and local laws regarding business permits and licenses that may be required to carry out the services performed under the contract.

**SECTION 5 – FORM OF CONTRACT**

**5.1 Exceptions to Contract**

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.

Prior to award, and if necessary, the apparent winning Respondent will be required to enter into discussions with AH to resolve any contractual differences before an award is made. These discussions will be finalized and all exceptions resolved within the timeframe specified by AH after notification of potential award. Failure to resolve contractual differences, including failure to return signed documents within time frames specified by AH, will lead to rejection of the Respondent's proposal.

**5.2 Contract Terms and Conditions**

The contract that AH expects to award as a result of this RFP will be based upon the RFP, the contract terms and conditions, the Proposal submitted by the successful Respondent and any subsequent revisions to the Respondent's Proposal and the contract terms and conditions due to negotiations, written clarifications or changes made in accordance with the provisions of the RFP, and any other terms deemed necessary by AH, except that no objection or amendment by a Respondent to the RFP requirements or the contract terms and conditions shall be incorporated by reference into the contract unless AH has explicitly accepted the Service Provider's objection or amendment in writing.



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**EXCEPTIONS OR OBJECTIONS TO THE PROPOSED CONTRACT TERMS MUST BE IDENTIFIED AND SUBMITTED WITH THE RESPONDENT'S PROPOSAL. AH WILL NOT ACCEPT PROPOSED EXCEPTIONS OR OBJECTIONS THAT CONFLICT WITH OR ATTEMPT TO PREEMPT MANDATORY REQUIREMENTS.**

**PRIOR TO AWARD, AND IF NECESSARY, THE APPARENT WINNING RESPONDENT MAY BE REQUIRED TO ENTER INTO DISCUSSIONS WITH AH TO RESOLVE ANY CONTRACTUAL DIFFERENCES BEFORE AN AWARD IS MADE. THESE DISCUSSIONS WILL BE FINALIZED AND ALL EXCEPTIONS RESOLVED WITHIN THE TIMEFRAME SPECIFIED BY AH AFTER NOTIFICATION OF POTENTIAL AWARD. FAILURE TO RESOLVE CONTRACTUAL DIFFERENCES WILL LEAD TO REJECTION OF THE RESPONDENT'S PROPOSAL.**

**AH RESERVES THE RIGHT TO REJECT OFFERS OR END DISCUSSIONS WITH RESPONDENTS THAT ARE NOT FORTHCOMING WITH EXCEPTIONS IN THE PROPOSAL SUBMISSION. GENERALIZED EXCEPTIONS ARE NOT ACCEPTABLE (E.G., RESPONDENT IS AMENABLE TO REACHING NEGOTIATED TERMS WITH AH).**