ADDENDUM #1
ISSUE DATE: Tuesday, March 9, 2021

This Addendum shall become and form a part of:

Request for Proposals #2021-0052
Asset Management Software Solution

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 **Exhibit A:** *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 #2021-0052.**

ORIGINAL DUE DATE AND TIME:	**Thursday, March 11, 2021 at 3:00 P.M. Eastern Daylight Time**
REVISED DUE DATE AND TIME:	**Friday, March 19, 2021 at 3:00 P.M. Eastern Daylight Time**

1. **Question**
   Can you clarify what you mean by interactive dash-boarding and the types of dash boards you are looking for?

   Answer
   AH is seeking a software that provides an interactive dash board of property or portfolio level operational and financial data. The dash board(s) should provide a broad overview using key attributes established by AH and have the ability for users to filter or drill down to the details of the underlying data reflected in the dashboard.

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2. **Question**
You indicated in the RFP the need for the ability to generate workflow processes based on data uploads. Could you please elaborate and provide an example?

   Answer
   AH is seeking a software that can assist with task management for the Asset Management Department. An example of an asset management related task is management of various contracts for each property. Ideally, AH would like to have the ability upload contract(s) and their corresponding expiration dates into the software. AH is seeking a software that will track the contract expiration date and create a workflow process for assigned user(s) to renew the contract(s) once it's within 90 – 120 days of expiration.

3. **Question**
In the pre-bid conference Yardi was noted as an external software platform that would be a potential data interface. Are there other known platforms that you expect to have the software interface with?

   Answer
   There are no other platforms at this time.

4. **Question**
Based on last week's call, it appears there's only one data point that is in Yardi that needs to also be in the new AM system. Is there an agreement with Yardi on having some way to transmit data to the new AM system?

   Answer
   There is no current agreement with Yardi regarding data transmission to/from the potential AM system, as we do not have enough details yet on what that solution will be. Currently, any data transfers between Yardi and other third-party solutions go through interfaces developed and hosted by Atlanta Housing. Third-parties connect with AH, and AH connects to Yardi to exchange this data. Yardi does offer direct, third-party API integrations, but we cannot commit to the ability to use one of those at this point, again because we do not have enough information on what the new AM solution will be.

5. **Question**
Has the single chart of accounts been defined? Is the intent to use the COA used by the PHA, or FDS, or HUD multi-family or some other COA? Can we get a copy of the COA that will be used in this project?

   Answer
   The single chart of accounts has not been identified, but it is intended to follow the current chart of accounts used by AH.

6. **Question**
What are your KPI's that you will want to track for monitoring property performance?

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Answer

We would like to use the following key performance indicators to monitor property level and portfolio level performance: Debt Coverage Ratio, Current Ratio, Economic and Physical Occupancy, Rental Collection %, Net Operating Income/(Loss), Operating Expense Margin, Reserve Balance(s), Net Cash Flow, Physical Inspection Scores, Resident File Inspection Scores, performance on AH's MTW Benchmarks and more. Ideally, AHA would also like to have the ability to customize KPIs.

7. **Question**

Can you elaborate on what you mean by "confirm and reconcile" trial balance and financial statements?

Answer

AHA would like the software to verify the trial balance and appropriate financial reports balance or net to zero. In cases where the report(s) do not balance, AH would like the system to prompt the end user that there is a possible error with the report prior to allowing the report to be fully uploaded into the system.

8. **Question**

The RFP indicated a desired feature of tracking rental data such as current and historical rates. How does AHA obtain rental rate data now? How frequently does AHA get this data?

Answer

The rental data is provided by the management agents via a monthly Rent Roll Report.

9. **Question**

The RFP noted its desire to have a system assess risks through customized metrics such as completion of routine and emergency work orders. Is this information currently being provided to AHA by its agents? If yea, how frequent and in what form?

Answer

The customized operational metrics are captured on an excel template generated by AH. The information is provided by the management agents via a secure AH portal on a monthly basis.

10. **Question**

The RFP indicated a desire to have workflow configurations to include an in-app approval process. Can you please elaborate?

Answer

AH is seeking a software to assist with task and assignment management. Ideally the workflow configuration will allow a single task to be assigned to multi-level end users and will have the ability to set an approval order. Specifically, AH would like the software to allow a task to be assigned to an end user for preparation and routed to management-level end user for review/approval once the task is complete.

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11. Question

The RFP requested the ability to assign tasks based on user type. Please elaborate on the user types you envision for workflow management.

Answer

AH is seeking a workflow management that will include day-to-day end users and management level end-users. Inclusion of Executive Level end-users in the workflow management process is a plus.

12. Question

Under security requirements, the RFP requests protection of personal data such as PII, vendor data, account data, etc. Please describe any PII data that is being shared / transferred in the current environment.

Answer

PII can include tenant full name, mailing address, email, and other household information, including linked financial data such as rent or mortgage amount. When providing the Response, please make sure to detail all relevant security controls and processes associated with the AM solution and its hosting facility, in-regards to the handling of this and other sensitive data.

13. Question

The RFP requires secure transmission of data between systems. Please describe the methodology that is being used to transfer data between systems now.

Answer

Transmission of data between systems is currently performed manually, via Microsoft Excel & Word and Access.

14. Question

How many management companies are engaged to manage the 116 properties in the portfolio?

Answer

The properties in the real estate asset management portfolio are currently being managed by 23 management companies.

15. Question

What are the software platforms that they are using to manage their properties?

Answer

AH currently uses Microsoft Excel & Word, Microsoft Teams, SharePoint, Access and Power BI to manage its portfolio. The management companies engaged to manage the properties mostly use Yardi or OneSite. All management companies provide financial and operational data in excel format.

16. Question

The scope of work mentioned 5 software programs currently used for 100 properties. Is there an approximate distributions summary available to show how many properties are within each of the 5 software current programs mentioned in section 2.1?

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Answer
All properties are included within each of the following programs: Microsoft Excel & Word, Microsoft Teams, SharePoint, Access and Power BI.

17. Question
How many users is AHA anticipating will use this system?

Answer
AH is anticipating approximately 25 – 30 users. 10 – 15 of the users will require full access to input and upload data into the system while the remainder of the users will need view-only access. Please note the total number of users is subject to change.

18. Question
How many people will need to be trained on the system? (Administrators and end users)

Answer
At least 7 – 10 end users and Administrators will need to be trained to use the system.

19. Question
What is the approximate breakout as to how many are AHA staff versus contractor staff?

Answer
We are anticipating all users will be AH staff.

20. Question
Who (position title) will be the primary contact for this project for overall project management? For technical aspects of the project?

Answer
This information will be provided to the vendor once a software selection is made.

21. Question
What is your timeline for reviewing the RFP, best and final including demos, award and implementation?

Answer
Please note that timelines and anticipated schedule for this RFP can be affected by various factors (e.g., the number of responses received, the actual time it takes for evaluators to complete their review, etc.); however, an internal schedule is as follows:

- Reviewing the RFP will occur after preliminary due diligence has been performed on the proposals received by the deadline through the end of March.
- Software demonstrations will tentatively be scheduled during the first week of April
- AH hoped to receive approval from its Board of Commissioners by the end of May

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Implementation will occur approximately 30 to 45 days after the Board's approval to allow for contract negotiation and final execution. The actual implementation timeframe can be open ended at this time or may shift because there are so many other critical tasks and approvals that have to occur prior to the actual start of the project.

AH will expect Respondents to provide in their response the expected implementation timeframe of their proposed solution.

22. Question
What's the current methodology by which AHA receives financials for its properties both internally managed if any and those managed by third parties? What is the frequency?

Answer
AH currently receives monthly financial reports for all properties via a secure SharePoint portal that is hosted and managed by AH.

23. Question
The RFP noted that travel expenses outside of Atlanta are not reimbursable. If the selected contractor is from another state, will travel to and from ATL be reimbursable?

Answer
AH anticipates that most of the work can be done virtually or remotely; however, expects that some travel may be necessary. Respondents should incorporate all anticipated costs in their proposal response. Please note that any costs presented may be subject to negotiation.

24. Question
Cost structure: the RFP indicates that the fee proposal format is set up such that the 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. I didn't see a copy of this form. Can you please provide it?

Answer
For this RFP, AH did not provide a form to be utilized for presenting fees. Rather, the instructions provided were in an effort to make sure Respondents present comprehensive pricing and fees inclusive of personnel costs, and license fees, accommodation costs etc. Respondents shall utilize its own structure for proposing those fees.

25. Question
Is there a page limit for the RFP submission?

Answer
There is not a page limit for the RFP submission; however, we encourage Respondents to strike a balance between providing the appropriate response to the evaluation questions and submittals while also being succinct with the response.

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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 **Exhibit A** - *Addenda Acknowledgement Form.   The Form must be included in the Firm's response to the RFP*.

Albert Murillo
Senior Vice President, Contracts & Procurement