

# Request for Information (RFI) #2026-0111

## Automated Travel and Expense Management and Invoicing Solution

### 1. About The Housing Authority of the City of Atlanta, Georgia

The Housing Authority of the City of Atlanta, Georgia (“Atlanta Housing”) is the largest housing authority in Georgia and one of the largest in the nation. Atlanta Housing provides and facilitates affordable housing resources for over 26,000 low-income households. These affordable housing resources include Atlanta Housing-owned residential communities, Atlanta Housing-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. Atlanta Housing’s programs are funded and regulated by the U.S. Department of Housing and Urban Development (“HUD”). Using its Moving to Work flexibility; Atlanta Housing has implemented a variety of innovations that benefit low-income families and expand housing choice. Atlanta Housing’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 Atlanta Housing and its history, mission and business plan, Respondents are encouraged to visit Atlanta Housing’s website [www.atlantahousing.org](http://www.atlantahousing.org).

### 2. Background Information

Atlanta Housing seeks information from qualified firms to provide an Automated Travel and Expense Management and Invoicing Solution. Firms must provide details of their capabilities and pricing for comprehensive, automated travel and expense management solution with integrated invoicing, in accordance with the Statement of Work (SOW).

To view and download the full details of the Request for Information (RFI), on March 26, 2026, visit [www.atlantahousing.org](http://www.atlantahousing.org) and click on Doing Business with Atlanta Housing, then Solicitations. For questions regarding the RFI, please e-mail LaTasha Cole ([latasha.cole@atlantahousing.org](mailto:latasha.cole@atlantahousing.org)).

Respondents to this RFI should not exceed a fifteen (15) page submission, not including graphs or response to the questionnaire labeled Attachment 1. All responses are due by COB, Friday, April 10, 2026. Proposals shall be submitted via Atlanta Housing sourcing platform JAGGAER. Atlanta Housing **will not** accept any proposed in part or in whole through any other means. All requests for information or clarification pertaining to this solicitation must be addressed in writing to the sole point of contact LaTasha Cole email [latasha.cole@atlantahousing.org](mailto:latasha.cole@atlantahousing.org).

### 3. Request for Information Submission Requirements

Atlanta Housing is seeking qualified vendors to detail their capabilities and pricing for a comprehensive, automated travel and expense management solution with integrated invoicing, in accordance with the Statement of Work (SOW).

- Executive Summary and company overview
- Completed Technical Qualifications questionnaires/tables
- Project plan and implementation timeline
- Pricing (Exhibit A) with all fees, including any TMC service fees, OBT fees, and optional services
- Evidence of insurance, security certifications, and relevant accreditations
- Three (3) recent client references (preferably public sector)

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## **Automated Travel and Expense Management and Invoicing Solution**

This list is not all inclusive of the functionalities Atlanta Housing seeks but provides some framework for minimum functionality required. Please see Attachment A – Automated Travel and Expense Management and Invoicing Solution.

In your RFI response, please discuss the following:

1. Travel & Expense Automation
2. Travel Management Company (TMC) Services
3. Invoice Automation & Yardi Integration
  
4. Deliverables-Travel, Expense & Invoicing Services
5. Training & Implementation
6. Visual Implementation Plan & Estimated Hours
7. Service Level Agreements (SLAs) & Performance Metrics
8. Reporting Templates & Forecasting Dashboards

Atlanta Housing hopes to determine through the information gathered from this RFI whether firms are interested in partnering with Atlanta Housing for Automated Travel and Expense Management and Invoicing. Atlanta Housing is the largest housing authority in the Southeast region. Please note however, that this RFI is issued as a means of technical discovery and information gathering. This RFI is for planning purposes only and should not be construed as a solicitation nor should it be construed as an obligation on the part of Atlanta Housing to make any purchases.

Any decision to proceed with a formal solicitation is subject to internal approvals, including budgetary authorization. In the absence of such approvals, no further procurement action will occur. Additionally, this RFI should not be construed as a means to pre-qualify vendors. Atlanta Housing may utilize the results of this RFI to inform and shape a formal Request for Proposals (RFP) for the subject services/products/equipment at which time any firm that responds to this RFI can also submit a proposal in response to the formal RFP.

#### **4. Scope of Work**

##### **Travel & Expense Automation**

- Pre-Approval Workflow: Automated pre-trip approval aligned with Atlanta Housing travel policies.
- Conference/Training Registration: Automated workflows for conferences and training events.
- Travel Booking: Integration with airline and hotel booking systems; support for preferred vendors, travel policies, and approval workflows.
- Travel Agent Support: Certified agents for complex/group bookings and emergency changes; after-hours support.
- Travel Advances: Electronic request and approval of travel advances with automated routing and tracking.
- Expense Reimbursement: Receipt capture, policy enforcement, and automated reimbursement processing (including mileage, tolls, parking).

##### **Travel Management Company (TMC) Services**

- Provide full-service travel management aligned with Atlanta Housing travel policies and compliance requirements.
- Support complex itineraries, group travel, and emergency changes.
- Deliver duty-of-care services, including traveler tracking and risk alerts.
- Offer 24/7 customer support for travelers and arrangers.
- Integrate with online booking tools, expense management systems, and Yardi for financial reconciliation.
- Provide robust reporting and analytics dashboards for Finance and Operations.

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## Automated Travel and Expense Management and Invoicing Solution

- Ensure negotiated rates and cost optimization strategies.

### Invoice Automation & Yardi Integration

- Invoice Intake: Ability to ingest invoices from a single designated email address for centralized intake.
- Automated Routing: Intelligent routing of invoices for approval workflows based on cost center, project, or policy rules.
- Validation & Exception Handling: Automated parsing and validation of invoice data; flag duplicates or missing information.
- Yardi Upload: Seamless upload of approved invoices into Yardi for payment processing, with real-time status updates for reconciliation.
- Dashboard & Monitoring: Centralized dashboard for Finance and Approvers to monitor invoice status, workflow bottlenecks, SLA compliance, and payment status.
- Audit Trail: Comprehensive audit trail of all invoice actions (intake, routing, approval, upload).

### Invoice Automation KPIs

KPI	Target
Invoice Intake Accuracy	≥ 98%
Routing Time to First Approver	≤ 1 business day
Approval Cycle Time	95% within 3 business days
Upload to Yardi	100% within 1 business day
End-to-End Processing Time	90% within 5 business days
Exception Handling Resolution	95% within 2 business days
Dashboard Accuracy	Real-time refresh every 15 minutes
Audit Trail Completeness	100%

### Deliverables - Travel, Expense & Invoicing Services

- Pre-Approval Workflow: Automated pre-trip approvals aligned with Atlanta Housing travel policies and budgets.
- Conference/Training Registration: Automated workflows for conference and training event requests and approvals.
- Travel Booking via TMC: Online Booking Tool (OBT) and full-service agent support for air, hotel, and ground; enforcement of preferred vendors and negotiated rates.
- TMC Traveler Care: Certified agents for complex/group bookings, changes, and disruptions; 24/7/365 after-hours support and escalation.
- Travel Advances: Electronic requests and approvals with automated routing and tracking.
- Expense Capture & Reimbursement: Mobile receipt capture, policy rules, mileage/tolls/parking, and automated reimbursement processing.
- Invoice Processing & Reconciliation: Centralized billing, consolidated TMC invoices, folio capture, and automated three-way matching (booking ↔ invoice ↔ expense).
- Document Routing: Automated routing for approvals and audit, with configurable SLAs and escalations.
- Yardi Integration: Seamless upload of approved data (e.g., chart fields, projects, cost centers) and status feedback from Yardi.
- Mobile Access: Native mobile apps for travelers, approvers, and finance administrators.
- Audit Trail: Comprehensive, immutable audit trails for all transactions and approvals.
- Reporting & Compliance: Real-time dashboards for spend compliance, bottlenecks, exceptions, reconciliations, and ERP integration status.
- GSA Rate Updates: Automated updates to federal per diem schedules; policy checks against per diem and fare rules.

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## Automated Travel and Expense Management and Invoicing Solution

### Training & Implementation

- Comprehensive Training Program: Instructor-led (onsite/virtual) at go-live; ongoing e-learning modules; downloadable guides and videos.
- Role-Based Training: Tailored curricula for travelers, approvers, finance/AP, and administrators.
- Implementation Support: Phased roll-out, configuration management, data migration, user acceptance testing (UAT), and production cutover.
- IT Compatibility: SSO/MFA, supported browsers and mobile OS versions, and secure integration endpoints.

### Visual Implementation Plan & Estimated Hours

The Service Provider shall deliver the following phased implementation with estimated hours by role. Hours are illustrative and will be finalized during project planning.

Phase	Key Activities	Project Manager (hrs)	SME (hrs)	Technical Integrations (hrs)	Training (hrs)
Discovery & Design (Weeks 1–2)	Requirements, policy mapping, integration design				
Configuration (Weeks 3–4)	System setup, workflows, roles, policy enforcement				
Integration & Data Migration (Weeks 5–6)	Yardi integration, SSO/MFA, test data loads				
UAT & Remediation (Weeks 7–8)	User acceptance testing, issue resolution				
Training & Change Management (Weeks 7–9)	Role-based sessions, job aids, communications				
Go-Live & Hypercare (Weeks 10–12)	Cutover, monitoring, daily stand-ups, stabilization				

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**Service Level Agreements (SLAs) & Performance Metrics** - Firms shall meet or exceed the following SLAs:

Metric	Target	Measurement & Reporting
System Uptime	>= 99.9%	Monthly availability report from monitoring platform
Critical Incident Response	<= 1 hour	Ticketing system timestamps; monthly SLA report
Standard Incident Response	<= 8 business hours	Ticketing metrics; monthly SLA report
Implementation Duration	Per agreed plan	Project plan milestones; weekly status
Training Completion	100% designated users in 30 days	Learning management reports
Yardi Data Accuracy	100% accepted uploads	Integration reconciliation reports
Travel Booking Turnaround (post-approval)	<= 2 hours	Workflow timestamps
Expense Reimbursement	<= 5 business days post-approval	AP cycle time reports
Invoice Processing	<= 10 business days from receipt	AP queue metrics
Forecasting Accuracy	+/- 10% vs actual monthly spend	Variance analysis in dashboards
After-Hours Call Answer Time (TMC)	80% within 60 seconds	Telephony reports
Ticketing Turnaround (TMC)	<= 2 hours from request	PNR/ticketing timestamps
Unused Ticket Application Rate (TMC)	>= 95% eligible value applied	TMC audit reports
Refund/Exchange Processing (TMC)	<= 5 business days	TMC queue metrics

### Reporting Templates & Forecasting Dashboards

- Monthly Travel Spend Report – by department, project, traveler, vendor.
- Policy Compliance Report – exceptions, approvals outside SLA, missing receipts.
- Advance & Reimbursement Aging – outstanding advances, reimbursement cycle times.
- Invoice Processing Report – received vs processed, approval bottlenecks.
- Yardi Integration Reconciliation – postings, rejects, and corrections log.
- Forecasting Dashboard – 3/6/12-month projections using historical trends and seasonality.
- Budget vs Actual – variance, drill-through to transaction level.
- Preferred Vendor & TMC Utilization – contract compliance, negotiated savings, and leakage.
- Unused Ticket Liability Report – balances, airline credits expirations, and application rate.

Dashboards must include interactive filters (department, property, date range), trend lines, category breakdowns, and export options (PDF, Excel).

### Travel Management Company (TMC) Requirements

- Accreditation & Experience: ARC/IATA accreditation (or equivalent) and demonstrated public sector experience.
- Coverage & Service: 24/7/365 after-hours support; dedicated account management; support for complex/group and conference travel.
- Technology: OBT integration, NDC/GDS content access, traveler profiles, negotiated rate loading, and queue automation.

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- Duty of Care: Traveler tracking, alerts, and disruption management; documented emergency escalation procedures.
- Unused Ticket & Credit Management: Systematic tracking and auto-application of eligible credits.
- Financial & Invoicing: Consolidated invoices, Level 3 data where available, folio capture, and compatibility with lodge/ghost/virtual cards.
- Data Security & Compliance: PCI-DSS for card handling, SOC 2 (or equivalent) for platform, and privacy controls.
- Reporting: Standard and custom TMC reports for savings, compliance, and service performance.

Service Credit Clauses: Vendor agrees to provide service credits for KPI breaches as outlined in the contract.

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## Attachment 1: Technical Qualifications Questionnaire

### System Architecture & Integration

Question
Describe your data interface (including any third-party processor) and its compatibility with Yardi.
What are the hardware/software requirements?
What are the user requirements (e.g., browsers, mobile OS versions, SSO/MFA)?
What are the user restrictions (e.g., maximum concurrent users, role limitations)?
Is there a maximum number of imports/maps for source files?
If applicable, when does your current contract end with your third-party processor?
What actions will be taken to ensure services continue if there is a lapse with the third-party processor?
What actions will be taken to ensure Atlanta Housing has access to all expense reports or documents within your platform?

### Specific Actions

Question
Does the system provide automated confirmations when items are approved?
How does the system enforce policy compliance and handle exceptions?
Does the system support real-time notifications for approvals and escalations?

### Service Enhancements & Technical Advancements

Question
Highlight any enhancements, technological or otherwise, that improve operational efficiency.
Describe any mobile app capabilities for travelers and approvers.

### Training & Support

Question
What training does your firm provide during implementation and year-round? Include instructor-led, web-based modules, guides, and videos.
How do you support role-based training for travelers, approvers, finance/AP, and administrators?

### Implementation Plan

Question
Describe the implementation plan and data migration process to ensure a smooth transition.
What is the average lead time required for implementation, including data import and system configuration?
How long will the data migration process take?

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## Ease of Management & Maintenance

Question
How many Atlanta Housing staff members can have access to the system? Describe the ease of adding/deleting/replacing users.
Does the system include an accessible repository for processed travel and expense records? How long are files archived?

## TMC-Specific Questionnaire

Question
Identify your TMC partner(s) and provide ARC/IATA accreditation details.
Describe your OBT and agent-assisted booking workflows and how policy is enforced.
Detail after-hours coverage, escalation paths, and average response times.
Explain consolidated invoicing, supported payment methods (lodge/ghost/virtual cards), and reconciliation process.
Describe APIs/data feeds between the TMC and platform; list GDS/NDC content sources.
Provide examples of TMC reports (utilization, negotiated savings, leakage, unused ticket credits).
Explain your duty-of-care capabilities (traveler tracking, alerts, emergency support).

## Attachment 2: Automated Travel and Expense Management and Invoicing Solution

### Atlanta Housing's Accounts Payable Statistics Invoicing Statistics

Invoice Category	#	2023		2024		2025		Total #	Total \$
		#	\$	#	\$	#	\$		
Contracts	3,962	43,543,192	3,999	59,548,727	2,996	93,669,247	10,957	196,761,167	
Micro Purchase	2,049	2,072,380	2,282	1,957,332	2,973	6,347,586	7,304	10,377,298	
Credit/Corporate Card	766	495,674	841	629,369	1,242	839,216	2,849	1,964,259	
Utilities - Elec/Gas/Water	495	2,295,522	468	2,219,685	468	1,617,169	1,431	6,132,375	
Utilities - Cable/Telephone	450	573,171	389	640,424	448	589,747	1,287	1,803,342	
Non Contracts/Contributions	378	4,415,424	385	21,587,018	715	10,211,460	1,478	36,213,901	
Subsidy to Signature Props	347	10,487,401	319	11,151,986	320	11,460,531	986	33,099,918	
REG Contracts	339	21,395,933	318	12,813,810	154	5,200,923	811	39,410,665	
Travel Adv/Reimbursement	336	131,445	378	132,417	379	148,913	1,093	412,775	
DPA II	135	2,845,000	234	4,845,000	252	4,965,000	621	12,655,000	
Tenant Assistant Payments	108	6,262,442	102	8,946,836	70	6,473,148	280	21,682,426	
PILOT Payments	59	252,594	-	-	58	386,566	117	639,160	
Solid Waste	9	5,829	-	-	11	4,404	20	10,233	
Real Estate Taxes	-	-	-	-	12	523,519	12	523,519	
<b>Grand Total</b>	<b>9,433</b>	<b>94,776,006</b>	<b>9,715</b>	<b>124,472,604</b>	<b>10,098</b>	<b>142,437,429</b>	<b>29,246</b>	<b>361,686,039</b>	

Our current volume run rate has increased 3% year over year. Increased headcount has been the solution to offset this challenge.

Average reimbursement cycle time (request/invoice received to payment issued):

- Minimum is eight (8) business days with no issues.
  - During high peak travel season (June – September), this time frame increases to 15 – 20 business days.

Percentage of travel requests/reimbursements returned for correction: 95%

- Common reasons include:
  - Incomplete information (i.e., missing conference/training registration link with password information, incorrect per diem rate and/or amount, travel dates do not correspond with event dates, etc.)

Manual processing time for booking travel requests (for training and conference attendance):

- 30 minutes if all required information is received and no additional follow-up is necessary
  - Four (4) out of every five (5) requests require a follow-up request for additional information

The agency currently has two credit cards. The credit card function is an additional role for both credit card processors, so transaction posting varies depending on their workload. On average, it typically takes three (3) to five (5) business days to complete transactions.

Travel Reimbursement Approval Layers:

- There are seven (7) approval layers regardless of the threshold amount.
- The average time it takes from one approver to the next is two (2) to three (3) days.
- Only the Accounts Payable team has visibility of invoice routing. The Business Units do not have visibility.

## Attachment 2: Automated Travel and Expense Management and Invoicing Solution

# Travel Expense Workflow

## Finance Lens

1. Employee submits Travel Advance Request with all required supporting documentation

2. Finance reviews the request for completeness and compliance.

3. AMS Helpdesk uploads the travel advance into the system.

4. Accounts Payable (AP) codes the request with account #, property code, and travel dates.

5. Budget Manager reviews and approves the travel advance.

6. Accountant reviews the approved request.

7. Finance Director creates a batch and commits the payment in YARDI.

8. AP team member processes the payment in YARDI.

9. AP creates bank files and routes them through DocuSign for Finance Director and Controller sign-off.

10. Senior Cash Management Analyst uploads the bank file online.