



**AD-24-RFP-948**  
**Request for Proposal**

**Yardi Conversion Prpject Manager/ Implementation Consultant**

**Issue Date: September 4, 2024**

**Karen DuBois-Walton, Ph.D**  
**President**



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**Part I. Solicitation Information**

**A. Description of Services**

We are seeking a qualified firm with expertise in Yardi Software to provide comprehensive consulting services for our software conversion project. Elm City Communities is a Moving to Work Agency with estimated 6500 HCV's (includes LIHTC units ) and 800 LIPH units. The ideal partner will have a proven track record in successful Yardi implementations and the ability to tailor solutions to meet our specific operational needs.

**B. Important Due Dates/ Locations/ Time**

Schedule	
Event	Date
RFQ Issued	September 4, 2024, at 3:00PM
Pre-Proposal Conference	September 18, 2024, at 1:00PM
Questions Due	September 20, 2024, at 12:00PM
Proposals Submittal Deadline	September 30, 2024, at 3:00PM

A Pre-Proposal Conference is scheduled for September 18, 2024, at 1:00 p.m. ONLY via conference call. Conference call link is attached as a separate document. Attendance is not mandatory but is recommended.

All questions concerning this RFP must be submitted in writing no later than September 20, 2024 at 12:00 p.m. EST using the Elm City Communities Collaboration Portal website: <https://newhavenhousing.cobblestonesystems.com/gateway>. In order to submit questions, you must register as an Interested Respondent.

Once the question period has ended, all responses to questions will be posted as an addendum and posted on Elm City Communities Collaboration Portal website: <https://newhavenhousing.cobblestonesystems.com/gateway>. All Addenda's must be acknowledged with a signature and timely submitted as part of this solicitation. Bids will be rejected if the addendum is not timely submitted as stated.



### **C. Preparation of Submission:**

**Respondent must submit ONE complete file** and must be uploaded via the Housing Authority of the City of New Haven's Collaboration Portal website:  
<https://newhavenhousing.cobblestonesystems.com/gateway>.

**Caution: Late Proposal submission will be handled in accordance with the provisions contained in HUD Form HUD 5369-B Titled "LATE SUBMISSIONS, MODIFICATIONS, AND WITHDRAWALS OF OFFERS".**

Persons wishing to receive copies via overnight delivery are responsible for making all arrangements and paying related costs. All cost related to the preparation of this RFQ and any related activities are the responsibility of the Offeror. HANH/ECC does not assume any liability for any cost incurred by the Offeror throughout the entire selection process.

All proposals submitted must conform to the requirements specified in the Instructions to Offerors, General Contract Conditions, and any/all other requirements contained herein, all of which form a part of the Request for Proposals by reference.

HANH/ECC reserves the right to postpone or cancel this RFQ, to reject, in whole or in part, any and all proposals, to re-advertise for new proposals, and/or to not award any agreement pursuant to the RFP requirements if HANH/ECC deems it's in their best interest to do so. HANH/ECC further reserves the right to waive any minor informality, or the failure of any bidder to comply there with, if it is in the public interest to do so.

HANH/ECC will reject the proposal of any bidder who is suspended and/or debarred by HUD from providing services to public housing authorities and reserves the right to reject the proposal of any who has previously failed to perform any contract properly for HANH/ECC, or any instrumentality thereof.

## Part II. Bid Protest

Disagreements over the award of a HANH contract, referred to as protests, may occasionally arise between the PHA and an offeror. Usually, the protestor asserts that he/she should have received the contract award and alleges that HANH did not conduct the competition appropriately. (Note: While protests are commonly referred to as bid protests, any type of contract award, including small purchase, competitive proposal, or sealed bid, may be protested by an unsuccessful offeror.) HANH, in accordance with sound business judgment, is responsible for the settlement of protests arising from the procurement process.

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**1. Designation of Protest Officials.** The Contracting Officer shall be responsible for the receipt of any form bid protest in writing and with conducting the initial bid protest hearing. Bid protest must be submitted within ten (10) days of the award of contract by the Authority.

The Contracting Officer shall render an impartial decision regarding any bid protest.

**2. Appeal of Initial Bid Protest Decision.** If the Contracting Officer denies the bid offeror's bid protest, the protestor must request an appeal of said finding in writing no later than ten (10) days of the date of receipt of the decision of the Contracting Officer. The appeal hearing will be conducted by no less than two (2) members of the Board of Commissioners (i.e., the Service Committee or the Planning and Development Committee.) The request for an appeal hearing shall be directed to the Contracting Officer.

**3. Requirements for Written Protests.** Protestors shall submit a bid protest in writing to the Contracting Officer within ten (10) days of the award of the subject contract by the Authority to the following address. **Protest against terms of the solicitation must be made prior to the due date of solicitation.**

Contracting Officer  
360 Orange Street  
3<sup>rd</sup> Floor



New Haven, CT 06511

The bid protest must clearly state the basis for the protest. Protests should include, at a minimum, the following information:

- a. Name, address, and phone number(s) of the protestor;
- b. Solicitation number and project title;
- c. A detailed statement of the basis for the protest;
- d. Supporting evidence or documents to substantiate any arguments; and
- e. The form of relief requested (e.g., reconsideration of their offer).

4. **Submission Time Period.** Generally, the offerer shall submit bid protest no later than ten (10) days of date the award of subject contract is made by the Board of Commissioners. **Protests against the terms of a solicitation should be considered late if submitted after the due date for offers.**

5. **Time Period for Formal Protest Hearing.** The Contracting Officer, or his/her designee, shall conduct a protest hearing, if the written request warrants within ten (10) calendar days of receipt of the writing request by the protestor. The Contracting Officer may deem, based upon the evidence presented by the protestor, that a hearing is not warranted and that an unbiased and impartial initial decision can be rendered without the need of a face to face hearing.

6. **Remedial Action.** If a protest is decided in favor of the protestor, HANH may consider, inter alia, the following remedies:

If the contract has not been awarded, the HANH may cancel or revise the solicitation or proposed contract award, or

If the contract has been awarded, the contract may be terminated for convenience and awarded to the protestor, or the procurement may be canceled and offers re-solicited.

7. **Emergencies or Unusual and Compelling Circumstances.** HANH may allow a contract to remain in place despite a successful protest in cases of emergency or unusual or compelling need for the supplies or services. However, if the HANH determines, based on compelling circumstances such as an emergency or serious disruption of its operations, that termination or re-solicitation would not be in the best interest of HANH, then HANH may allow the award to stand and pay the successful



protestor costs associated with preparing the bid along with the cost of filing and pursuing the protest and other damages determined.

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8. **Denials.** HANH shall notify the protestor in writing of its decision and state the basis for the denial. The notification shall apprise the protestor of any appeal rights in accordance with our protest procedures.

9. **Appeal Procedures.** As stated above, appeal of the Contracting Officer's initial decision shall be heard by no fewer than two members of the Board of Commissioners (i.e., the Service Committee or the Planning and Development Committee). The request for an appeal must be made in writing as stated above and must include, but not be limited to:

1. A statement of the factual and legal grounds on which reversal or modification of the decision is deemed warranted, specifying any errors of law made or information not previously considered.

10. **Documentation.** The Contracting Officer shall fully document the protest decision in writing in the contract file. Documentation shall include but not be limited to:

1. A copy of the subject solicitation and supporting documentation, including the copy of the advertisement of the bid.
2. A copy of the protestor's written protest.
3. A copy of the written finding of the Contracting Officer and that of any appeal officer(s).
4. Copy of documentation used by HANH to make its decisions that was protested by the protestor.

11. **Informal Resolution Processes.** Protestor may request an informal review of their protest either in writing or by phone.

## **EQUAL EMPLOYMENT OPPORTUNITIES REQUIREMENTS**

All Equal Employment Opportunities including Section 3 (EEO) forms are provided in this package. The contractor/vendor must review all EEO forms, complete and submit the required EEO forms at the time of submission of bid or proposal. Bids/Contracts at all dollar values are subject to Section 3/MBE/WBE requirements.



After a Contract has been awarded, the contractor must attend a mandatory meeting with HANH's Director of Procurement. If there are any questions regarding the completion of the EEO forms please contact the Director of Procurement, at 203-498-8800 ext 1200.

Staff is available at 360 Orange Street, 3rd floor, to assist persons with disabilities. The TTY/TDD number is (203) 497-8434. HANH is an equal opportunity housing agency.  
HOUSING AUTHORITY OF THE CITY OF NEW HAVEN

*Karen E. DuBois-Walton, Ph.D.*

By:

Date:

Karen DuBois-Walton, Ph.D.  
President





### Part III. Index Of Submittal Documents

The INDEX OF SUBMITTAL DOCUMENTS shown below is provided to assist all Offerors in correctly preparing and submitting a responsive RFP in accordance with the requirements of the above RFP. The Index contains a listing of all required submittal items.

Please review this index and submit all documents that are checked “**REQUIRED SUBMITTAL**” with your proposal. Documents that are checked “**SIGNATURE REQUIRED**” must be properly executed. Documents that are checked “**NOTARY/CORPORATE SEAL REQUIRED**” must be notarized and/or have the Bidder's corporate seal affixed.

Please view/ download the below listed documents from:

<https://newhavenhousing.cobblestonesystems.com/gateway/DocumentLibrary.aspx>

INDEX OF SUBMITTAL DOCUMENTS				
DOCUMENT	REQUIRED SUBMITTAL	SIGNATURE REQUIRED	NOTARY/ CORPORATE SEAL REQUIRED	FOR YOUR REVIEW
<b>ALL PROJECTS</b>				
Letter of Interest	X	X		
Executive Summary	X			
Team Experience and Qualifications	X			
Offeror's Approach	X			
Project Schedule / Availability	X			
Staffing & Qualifications	X			
Sample of Relevant Material	X			
<b>Required Acknowledgements and Certifications as listed below:</b>				
Cover Sheet <i>(Attached)</i>	X			
HUD-5369-C- Certifications and Representation of Offerors	X	X		
HUD-5369-B Instruction to Offerors				X
HUD 51915- Contract Provisions Required by Federal Law or Owner Contract with US Department of Housing and Urban Development				X
HUD 51915a- Model Form of Agreement between Owner & Design Professional				X
Reference and Past Performance Form	X			
Acknowledgement of Addenda Form	X	X		
Section 3 Contractor Guide 2021				X
Contractor Highlight Section 3				X
Federal Executive Order 11246				X
HANH/ECC Section 3 Clause				X
HANH/ECC Bid Conditions for Equal				X



<i>Opportunity in Employment</i>				
<i>General Conditions for Non- Construction- HUD 5370-C</i>				X
<i>HUD Form 50071- Certification of Payments to Influence Federal Transactions</i>	X	X		
<i>Non-Collusive Affidavit</i>	X	X	X	
<i>HANH/ECC's Insurance Requirements</i>				X



## **Part IV. Scope of Services**

### **1. Introduction**

This Scope of Work (SOW) outlines the objectives, tasks, deliverables, and schedule for a Project Manager to oversee the system conversion project for Elm City Communities. The purpose of this project is to successfully convert the existing on premise Emphasys Elite system to a private cloud Yardi Voyager system, ensuring minimal disruption to business operations and achieving the desired improvements. This SOW ensures that all parties are aligned and understand the expectations and outcomes of the project.

ECC will be implementing the following Yardi products:

1. Voyager PHA
2. Voyager Affordable Housing
3. Maintenance IQ/ Inspections IQ
4. Budgeting and Forecasting
5. Rent Café
6. Procure to Pay
7. Legal

### **2. Objectives**

The primary objectives of the system conversion project are:

- To cooperatively plan and execute the conversion of the existing system to the new system.
- To ensure the new system meets all business requirements and specifications.
- To manage the project within the defined scope, time, and budget constraints.
- To ensure a smooth transition with minimal disruption to ongoing operations.

### **3. Scope**

This project will involve the following phases:

- Project Planning
- System Design and Configuration
- Data Migration
- Testing



- Training and Documentation
- Go-Live and Post-Implementation Support

#### **4. Tasks**

The tasks to be performed by the Project Manager include:

##### **4.1. Project Planning**

- Develop a detailed internal project plan and timeline to align with YARDI resources.
- Define project scope, goals, and deliverables.
- Identify project stakeholders and establish communication protocols.
- Assemble and lead the project team.

##### **4.2. System Design and Configuration**

- Work with technical teams to define system requirements and specifications.
- Oversee the configuration of the new system to meet business needs.
- Coordinate with vendors and third-party providers as needed.

##### **4.3. Data Migration**

- Develop a data migration strategy and plan.
- Oversee data extraction, transformation, and loading (ETL) processes.
- Ensure data integrity and accuracy throughout the migration.

##### **4.4. Testing**

- Develop a comprehensive testing plan, including unit, system, integration, and user acceptance testing (UAT).
- Coordinate and oversee testing activities, ensuring issues are identified and resolved.
- Document and track testing results and defects.

##### **4.5. Training and Documentation**

- Develop a training plan for end-users and administrators.
- Oversee the creation of training materials and user documentation.
- Coordinate and conduct training sessions.



#### **4.6. Go-Live and Post-Implementation Support**

- Develop a detailed go-live plan, including cutover activities and timelines.
- Oversee the execution of the go-live plan, ensuring minimal disruption to operations.
- Provide post-implementation support to address any issues and ensure system stability.

#### **5. Deliverables**

The deliverables for this project include:

- Project Plan and Timeline
- System Requirements and Specifications Document
- Data Migration Plan and Execution Report
- Testing Plan and Results
- Training Plan and Materials
- Go-Live Plan and Cutover Checklist
- Post-Implementation Support Plan
- Project Completion Report

#### **6. Schedule**

The project will be completed over a period of 12 months, with key milestones as follows:

- Project Kickoff:
- System Design and Configuration:
- Data Migration:
- Testing:
- Training:
- Go-Live:
- Post-Implementation Support

#### **7. Acceptance Criteria**

The system conversion project will be considered complete when:

- All tasks outlined in the SOW are completed.
- All deliverables are submitted and accepted by Elm City Communities
- The new system is fully operational and meets all specified requirements.



- The project is completed within the defined scope, time, and budget constraints.

## **8. Assumptions and Constraints**

- Access to necessary documents, systems, and stakeholders will be provided in a timely manner.
- Stakeholders will be available for meetings, reviews, and approvals as scheduled.
- The project will be conducted within the agreed-upon timeline and budget.

## **9. Confidentiality**

All information gathered during the system conversion project will be treated as confidential and will only be used for the purpose of this project. The project team will adhere to Elm City Communities' confidentiality policies.

## **10. Qualifications**

- a. Experience with implementation, training and problem solving with above Yardi modules described above required.
- b. Experience with Yardi setups, functionality and system software structure
- c. Comprehensive knowledge of property management, financial, and other HUD programs best practices.
- d. Demonstrated ability to manage multiple projects and competing priorities
- e. Strong technical aptitude and work experience with technical applications and systems.
- f. Has proven experience working with the above modules, analyzing current problems and training staff on how to solve the problem.
- g. Minimum five (5) years' experience with multi-family affordable housing business.



## **Part V. Submission Requirements**

### ***a. Proposal Preparation And Submission***

Offerors' proposals must be prepared and submitted in such a manner that they address, at a minimum, the requirements of Sections B through L below in appropriate detail. Other preparation and submission requirements may be required by documents contained within Part IV (Scope of Services). It is the Offeror's responsibility to ensure that their proposal submittals properly address all requirements requested by the RFQ.

### ***b. Letter of Interest***

At the beginning of each proposal, the Offeror must provide a letter of interest listing the Offeror's members and identifying the primary contact person. The letter must be signed by an authorized principal of the Offeror's firm and include a statement that the proposal will remain valid for not less than one hundred twenty (120) days from the due date

### ***c. Executive Summary***

Provide a brief description of no more than two (2) type-written double-spaced pages demonstrating your organization's understanding of the services required by this RFQ and how your organization's technical expertise, experience; Public Housing and/or affordable housing renovation, financial resources, proven past performance, and proven managerial processes are consistent with and capable of supporting the specified requirements contained herein.

### ***d. Team Experience and Qualifications***

- a. Name of Offeror and proposed role.
- b. Main address, telephone/fax numbers and email address of Offeror's place of employment.
- c. Address and telephone number of the office from which services will be provided to the Agency (if different from above).
- d. Contact person, title, telephone/fax numbers and email address.
- e. Description of the size, number of employees and the current workload of the Offeror.
- f. Identify the individual who will serve as Project Manager for the Offeror and who will direct and coordinate the effort to completion.



**e. Offeror's Approach to Providing Required Services**

Provide a brief description of no more than four (4) type written doubled space pages describing your organization's understanding of each of the separate tasks required under Part IV. (Scope of Services) and the methodology that will be utilized to provide all required services.

**f. Project Schedule/ Ability to Perform in a Timely Manner**

Describe your organization's ability to perform all required services in a timely manner. Include all proposed processes and timeframes for completion of same.

**g. Staffing and Qualifications/ List of Key Personnel**

Provide a listing of all key personnel that will be responsible for demonstrating their relevant experience necessary to perform the required services contained herein along with copies of current resumes applicable to each. The Contractor must provide HANH with the qualification of prospective site staff and have at a minimum, five years training and consulting experience. Proof of the firm's Connecticut Professional Registration and Licenses.

**h. Sample of Relevant Material**

Submit samples of any/all charts, documents, forms, etc. that your organization will utilize to perform the required services contained herein.

**i. Relevant and Past Experience**

Offeror(s) must complete three (3) HANH Reference and Past Performance Forms. Offeror(s) **may not** use HANH, Glendower or any of its affiliates as a reference.

**j. Employment and Contracting Action Plan**

Offeror(s) should review HANH's Bid Conditions for Equal Opportunity in Employment, Section 3 Clause (Qualification Information), Federal Executive Order 11246 Compliance Requirements, and Clauses 16 (Equal Employment Opportunity) and 21 (Training and Employment Opportunities for Residents in the Project Area) of HUD Form





HUD-5370-C (General Conditions for Non-Construction Contracts).

***k. Required Certifications***

All certifications and other required documents shown on the "Index of Submittal Documents Required for RFQs" must be prepared and submitted with Offeror's proposal for the proposal to be considered responsive to the HANH Request for Proposals (RFQ)/Solicitation requirements. The minimum amount of time that Offeror's proposal must remain valid is ONE HUNDRED AND TWENTY (120) calendar days from the proposal submittal date.

***l. Mandatory Clauses***

HUD FORM HUD-5370-C (General Conditions for Non-Construction Contracts) and HANH's Supplemental Conditions to HUD Form HUD-5370-C include all clauses mandated by 24 CFR 85.36.



## Part VI. Evaluation Criteria And Selection Procedures

### 1. Proposal Evaluation/Contract Award

Evaluation of the responses to this RFP may be evaluated using a two-step process. Step 1 may be used to determine which Offerers proposals are acceptable or potentially within the acceptable range. During Step 1, a committee will be appointed to evaluate technical proposals in accordance with the evaluation criteria stated in the RFP. The technical evaluation panel or committee performs the review of all technical proposals using the RFP's evaluation criteria.

For the purpose of conducting negotiations, proposals will be initially classified as acceptable, potentially acceptable, or unacceptable. The competitive range decision will take into account the evaluation of both technical and cost/price proposals. Proposals determined by the Contracting Officer to be acceptable or potentially acceptable and that have a reasonable chance of award shall be included in the competitive range.

As part of the evaluation process, proposals classified as acceptable and potentially acceptable will be requested to present its proposal and demonstrate the system before the evaluation committee. Any information gained during the presentation(s) may be used in the evaluation of the proposal. Failure to honor this request will be grounds for rejection of the respondent's proposal with no further consideration given.

### 2. Evaluation Criteria

The evaluation criteria to which each Offeror's submitted proposal will be reviewed, ranked, and scored is as follows. Each proposal has a maximum total possible score of 105 points.

1. **Qualifications:** Firm's qualification and experience including specific qualifications assigned to this project. **(Maximum of 30 points)**.
2. **Capacity/ Approach:** The proposer's demonstrated understanding of ECC's requirements. The appropriateness of the technical approach and the quality of the services proposed. **(Maximum of 20 points)**



3. **Demonstrated Experience in performing similar work and the proposer's Demonstrated Successful Past Performance:** Examples of work and accomplishments demonstrated on similar projects. ECC will place particular importance on experience and past performance with other Housing Agencies or in HUD- or housing related work. **(Maximum of 30 points)**
4. **Cost:** Compensation structure preference given to the most cost-efficient proposal **(Maximum of 20 points)**

**Additional Points:**

1. **Section 3, MBE and WBE:** Responsiveness of the Affirmative Action Plan and Section 3 Plan to HANH's goals and demonstrated evidence of the firm's prior effectiveness in promoting Affirmative Action and Section 3 goals. (5 points)

Statement of Qualifications will be reviewed by an Evaluation Committee and in accordance with ECC/HANH's Procurement Procedures.

For the purpose of conducting negotiations, proposals will be initially classed as:

- Acceptable (within range of 70-105 points),
- Potentially acceptable (within range of 60-69 points) or
- Unacceptable (within range of 0-59 points).

Proposals determined by ECC/HANH's Contracting Officer to be either acceptable or potentially acceptable and that have a reasonable chance of resulting in a contract award considering their technical evaluation results and their proposed costs will be included in the competitive range. Statement of Qualifications deemed acceptable or potentially acceptable will be invited for an interview.

Once ECC/HANH has completed the review process, ECC/HANH will enter into negotiations with the highest ranked firm selected by the evaluation criteria, with the intention of reaching a best and final offer on a fair and reasonable rate schedule for professional services. If an agreement cannot be reached, ECC/HANH will terminate negotiations with that firm and will proceed to the next-



highest ranked firm until rates determined to be fair and reasonable to both parties are obtained. Please note that if negotiations are terminated with a firm, ECC/HANH may not go back to that firm for any additional negotiations – even if the next lower ranked respondent is higher in price.

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All Offeror(s) must disclose any conflicts of interest, e.g., family member on HANH staff or a resident of public housing or Section 8 (Housing Choice Voucher) in the City of New Haven.