



Request for Proposals Software Solution for Real Estate Development Project and Asset Management

INTRODUCTION

Through this Request for Proposals (“RFP”), the Rhode Island Housing and Mortgage Finance Corporation (“RIHousing”) seeks proposals from qualified vendors to provide a software solution to intake and manage its Real Estate Development projects from application through asset management.

INSTRUCTIONS

Proposals should be submitted to **Carl Rotella, Director, Information Technology**, via email to crotella@rihousing.com. Proposals should be concise, include all attachments, and be presented on business letterhead.

Proposals must be received no later than 3:00 EST p.m. on Friday, October 30, 2020. Responses received after this date and time shall not be accepted. Note: No hard copy submissions will be accepted at this time.

Respondents are advised that all submissions (including those not selected for engagement) may be made available to the public on request upon completion of the process and award of a contract(s).

PRE-BID CONFERENCE

A non-mandatory pre-bid conference is scheduled via teleconference on Wednesday, October 14, 2020 at 4:00 P.M. E.S.T. Persons interested in participating in the pre-bid conference should call 1-866-225-4944, when prompted, use Caller ID 1240#.

SUBMISSION OF QUESTIONS AND RESPONSES

Starting October 14, 2020 and through October 20, 2020, RIHousing will accept questions in writing sent via email to Carl Rotella at crotella@rihousing.com. Questions and answers will be posted to the RIHousing [RFP webpage](#) on October 21, 2020.

SCOPE OF WORK

Please see the Scope of Work provided at [Attachment A](#).

ITEMS TO BE INCLUDED WITH YOUR PROPOSAL

Please note that failure to provide any information, certification, or document requested in this RFP may cause your submission to not be scored.

Submission
Check List

A. General Firm Information

1. Provide a brief description of your firm, including but not limited to, the following:
 - a. Name of the principal(s) of the firm.
 - b. Name, telephone number, and email address of a representative of the firm authorized to discuss your proposal.
 - c. Address of all offices of the firm.
 - d. The number of employees in the firm.

B. Experience and Resources

1. Describe your firm and its capabilities. In particular, support your capacity to perform the Scope of Work. Include a list of current or past projects similar in nature.

2. Indicate which principals and associates from your firm would be involved in providing services to RIHousing. Provide appropriate background information for each such person and identify his or her responsibilities.

3. Provide a detailed list of references, including a contact name, telephone number, and email address for organizations or businesses for whom you have performed similar work.

4. Provide a work plan and approach, including a timeline for milestones, for the Scope of Work in Attachment A. Address any specific changes in your project approach, or anticipated concerns or delays due to impacts of COVID-19.

5. Provide a statement relative to your ability to meet compliance requirements of the Health Insurance Portability and Accountability Act (HIPPA), Service Organization Controls (SOC), and the Gramm-Leach-Bliley Act (GLBA). Successful vendor will be required to provide proof of compliance upon request.

6. Identify any conflict of interest that may arise as a result of business activities or ventures by your firm and associates of your firm, employees, or subcontractors as a result of any individual's status as a member of the board of directors of any organization likely to interact with RIHousing. **If none, please provide a statement to such effect.**

7. Describe how your firm will handle actual and or potential conflicts of interest.

8. Identify any material litigation, administrative proceedings, or investigations in which your firm is currently involved. Identify any material litigation, administrative proceedings or investigations, to which your firm or any of its principals, Vendors, associates, subcontractors or support staff was a party that settled within the past two (2) years. **If none, please provide a statement to such effect.**

C. Fee Structure

The cost of services is one of the factors considered in awarding this contract. The information requested in this section is required to support the reasonableness of your fees. RIHousing anticipates a multi-year contract for these services with an initial contract term of three years with an option to renew, at RIHousing's discretion, for two additional one-year terms.

1. Please provide a cost proposal for providing the Scope of Work at Attachment A for the initial three-year contract. Note that there are three bidding options available to the vendor.

2. Provide an itemized breakdown of billing rates and hourly costs, a list of key personnel and their hourly rates, reimbursable expenses, etc. for any services that may be requested in addition to the services previously described.

3. Please provide any other fee information applicable to the engagement that has not been previously covered that you wish to bring to the attention of RIHousing.

D. Miscellaneous

1. RIHousing encourages the participation of persons of color, women, persons with disabilities, and members of other federally and State-protected classes. Describe your firm's affirmative action program and activities. Include the number and percentage of members of federally and State-protected classes who are either principals or senior managers in your firm, the number and percentage of members of federally and State-protected classes in your firm who will work on RIHousing's engagement and, if applicable, a copy of your Minority- or Women-Owned Business Enterprise state certification.

2. Discuss any topics not covered in this Request for Proposals that you would like to bring to RIHousing's attention.

E. Certifications

1. RIHousing insists upon full compliance with Chapter 27 of Title 17 of the Rhode Island General Laws, Reporting of Political Contributions by State Vendors. This law requires State Vendors entering into contracts to provide services to an agency such as RIHousing, for the aggregate sum of \$5,000 or more, to file an affidavit with the State Board of Elections concerning reportable political contributions. The affidavit must state whether the State Vendor (and any related parties as defined in the law) has, within 24 months preceding the date of the contract, contributed an aggregate amount above \$250 within a calendar year to any general officer, any candidate for general office, or any political party. Please acknowledge your understanding of this in your RFP response.

2. Does any Rhode Island “Major State Decision-maker,” as defined below, or the spouse or dependent child of such person, hold (i) a ten percent or greater equity interest, or (ii) a Five Thousand Dollar or greater cash interest in this business?

For purposes of this question, “Major State Decision-maker” means:

(i) All general officers; and all executive or administrative head or heads of any state executive agency enumerated in § 42-6-1 as well as the executive or administrative head or heads of state quasi-public corporations, whether appointed or serving as an employee. The phrase “executive or administrative head or heads” shall include anyone serving in the positions of director, executive director, deputy director, assistant director, executive counsel or chief of staff;

(ii) All members of the general assembly and the executive or administrative head or heads of a state legislative agency, whether appointed or serving as an employee. The phrase “executive or administrative head or heads” shall include anyone serving in the positions of director, executive director, deputy director, assistant director, executive counsel or chief of staff;

(iii) All members of the state judiciary and all state magistrates and the executive or administrative head or heads of a state judicial agency, whether appointed or serving as an employee. The phrase “executive or administrative head or heads” shall include anyone serving in the positions of director, executive director, deputy director, assistant director, executive counsel, chief of staff, or state court administrator.

If your answer is “Yes,” please identify the Major State Decision-maker, specify the nature of their ownership interest, and provide a copy of the annual financial disclosure required to be filed with the Rhode Island Ethics Commission according to R.I.G.L. §§36-14-16, 17 and 18. If your answer is “No,” please provide a statement to such effect.



3. In the course of providing goods or services to RIHousing, the selected respondent may receive certain personal information specific to RIHousing customer(s) including, without limitation, customer names, and addresses, telephone numbers, email addresses, dates of birth, loan numbers, account numbers, social security numbers, driver’s license or identification card numbers, employment, and income information, photographic likenesses, tax returns, or other personal or financial information (from now on collectively referred to as the “Personal Information”). The maintenance of the Personal Information in strict confidence and the confinement of its use to RIHousing are of vital importance to RIHousing. **Please include a letter from your president, chairman or CEO certifying that in the event, your firm is selected:**

(i) any Personal Information disclosed to your firm by RIHousing or which your firm acquires as a result of its services hereunder will be regarded by your firm as confidential, and shall not be copied or disclosed to any third party, unless RIHousing has given its prior written consent thereto; and

(ii) your firm agrees to take all reasonable measures to (a) ensure the security and confidentiality of the Personal Information, (b) protect against any anticipated threats or hazards to the security or integrity of the Personal Information, and (c) maintain reasonable security procedures and practices appropriate to your firm’s size, the nature of the Personal Information, and the purpose for which the Personal Information was collected in order to protect the Personal Information from unauthorized access, use, modification, destruction or disclosure; and

(iii) when discarding the Personal Information, destroying it in a commercially reasonable manner such that no third party can view or recreate the information, electronically or otherwise.

These provisions, which implement the requirements of the Rhode Island Identity Theft Protection Act, R.I.G.L. § 11-49.2 et seq., will also be incorporated into the final contract with the selected respondent(s). In addition,



if selected, your firm may be requested to provide a copy of its information security plan.



4. Please include a letter from your president, chairman or CEO certifying that (i) no member of your firm has made inquiries or contacts with respect to this Request for Proposals other than in an email or written communication to **Carl Rotella**, crotella@rihousing.com seeking clarification on the Scope of Work set forth in this proposal, from the date of this RFP through the date of your proposal, (ii) no member of your firm will make any such inquiry or contact until after **Friday, October 30, 2020**, (iii) all information in your proposal is true and correct to the best of her/his knowledge, (iv) no member of your firm gave anything of monetary value or promise of future employment to a RIHousing employee or Commissioner, or a relative of the same, based on any understanding that such person's action or judgment will be influenced and (v) your firm is in full compliance with Chapter 27 of Title 17 of the Rhode Island General Laws, Reporting of Political Contributions by State Vendors.

EVALUATION AND SELECTION

A selection committee consisting of RIHousing employees (the "Committee") will review all proposals and make a determination based on the following factors:

- Professional capacity to undertake the Scope of Work
- Proposed fee structure
- Evidence of ability to comply with regulatory requirements (HIPPA, SOC, GLBA)
- Ability to perform within time and budget constraints
- Evaluation of work plan and approach
- Previous work experience and performance with RIHousing and/or similar organizations
- Recommendations by references
- Firm minority status and affirmative action program or activities
- Other pertinent information submitted.

RIHousing may invite one or more finalists to make presentations.

In its sole discretion, RIHousing may negotiate with one or more firms who have submitted qualifications to submit more detailed proposals on specific projects as they arise.

By this Request for Proposals, RIHousing has not committed itself to undertake the work set forth. RIHousing reserves the right to reject any proposals, to rebid the original or amended scope of services, and to enter into negotiations with one or more respondents.



RIHousing reserves the right to make those decisions after receipt of responses. RIHousing's decision on these matters is final.

For additional information, contact: Carl Rotella, crotella@rihousing.com.

Form Revised: October 2019



Attachment A
Scope of Work
Software Solution for Real Estate Development Projects
and
Asset Management and Compliance

Overview

RIHousing seeks to engage a vendor to provide a software application to intake and manage its Real Estate Development and Asset Management workflow from project application submittal to asset management in accordance with the requirements of each stage, module, and feature outlined below.

RIHousing currently manages its real estate development application intake, construction management and asset management and compliance processes with a series of disconnected processes ranging from the use of a fillable pdf for incoming applications, an Excel proforma for underwriting, an in-house custom designed DevConnect App for monitoring construction disbursements, Housing and Development Software (“HDS”) modules, and manual processes.

Additionally, for analytical purposes, RIHousing maintains a data warehouse which receives data from applications at certain points in the process. The data flows into a central SQL database for analytics, data storage, and collection purposes. Some of the SQL database processes are currently operating, some are in the development process using on-site personnel resources, and some are not connected and not currently being developed.

The successful vendor must develop a software application to manage the entire real estate development process by connecting the existing RIHousing applications in a seamless flow, provide accessibility of information and data, provide a coordinated project management approach, and improve the efficiency and insure the quality of asset management after closing. RIHousing will assign internal software engineering resources to work with the vendor to connect to existing RIHousing data sources.

There are three bid options available to the vendor:

1. The Primary Bid is to perform the FULL WORKFLOW (Modules 1, 2, 3, 4, 5, and 6) from end to end. This will require the vendor to build the entire software application process, develop modules where none exist today, replace existing modules, provide the connection between the modules, and ensure that data from specified modules is collected and retained in the data warehouse.
2. Alternate Bid 1 is to develop modules where none are in place, retain the modules that are currently in place, provide the connection between the modules, and ensure that data from specified modules is collected and retained in the data warehouse.
3. Alternative Bid 2 is to develop any one or more of Modules 1 through 6 separately. Vendor must identify which modules it will retain and which it will develop.

For the three options, the data from REQUIRED modules developed by the vendor must be in SQL database (SQL DB) and updated on intervals to RIHousing’s data warehouse.



Data applications created, reporting designs, and workflow documentation as a result of this project will be owned by RIHousing.

Modules and Design Requirements

The following chart outlines the Modules and the features of each module that the vendor will be required to develop. For stages where RIHousing currently has modules in place, the vendor requirement is noted as **OPTIONAL**, indicating that the vendor may choose to replace or retain the module. The cost and timing of development services in the bid proposal should reflect whether new development is needed for each module.

Module	RIHousing Current Process	Vendor Requirements	Comments
1. One Stop Application (OSA)	RIHousing currently uses fillable pdfs but is in the process of developing a one-stop application.	OPTIONAL The vendor shall create a full document package that can be forwarded to an email or an archive location as a pdf.	Includes applicant registration, funding source selection, the applicant completes program-specific questions to create the proper routing of and documentation requirements for the submitted application. Applicants may select one or more available funding sources. Tools such as chat bots and links will be developed for data fields that will provide the applicant with information necessary to complete the data field. Controls and parameters of data entry will be established for some questions. The autofill function will eliminate redundancy.
2. Proforma	RIHousing currently uses an Excel proforma developed by an external consultant. The proforma is used for internal project data review and underwriting. RIHousing is able to modify the proforma to add or delete programs as needed. Data	OPTIONAL The vendor and RIHousing shall create a connection process to send data from the One-Stop Application to fill matching proforma fields, which will be used in the application review and underwriting process.	RIHousing prefers to retain the use of its existing proforma; however, the vendor may replace the current proforma if they have a replacement process that is in service at other Housing Finance Agencies or if the new application can be demonstrated to be

	from the proforma is saved at specific points in the process to SQL DB and used in the Project Underwriting Stage.		similar to, or better than, RIHousing's current proforma. Alternatively, the vendor may use the existing proforma and provide for a front end to capture the data that will be required for the One Stop Application.
3. Project Underwriting – Deal	Underwriting is a complex and iterative process based on published guidelines. Currently, the Development team uses Smartsheet as a project management tool for the collection of due diligence requirements (underwriting and design and construction) and the proforma to analyze risk; however, the programs are stand-alone.	REQUIRED The vendor shall create or identify a document management system that will provide shared access to project documents across the corporation during the life of the project, including all phases from post-construction through asset management. The system should organize each project into a Master Project Folder. The Project Folder must be accessible by program staff with rights of access and ability to modify assigned as needed. Data from projects that are submitted but not funded will be included as a Project Folder but designated as unfunded and dated to allow for adherence to data retention schedules.	RIHousing team will support the vendor team on the development of the schema for the document management system.
4. Project Stage – Design and Construction	RIHousing currently uses in-house, custom-built software for construction accounting and Smartsheet as a construction file management tool.	OPTIONAL The vendor shall create a module to replace the current product or create a connection process to integrate RIHousing's existing module.	See the details below.
5. Asset Management & Compliance	RIHousing currently uses Excel, Smartsheet, pdf forms, HDS modules, and Inspect Check software.	REQUIRED The vendor shall create a workflow application with	RIHousing is responsible for monitoring ongoing compliance for multiple federal, state, and local

		reporting functionality, as outlined below.	housing programs, including LIHTC, Housing Choice Voucher Program, and HOME. It is critical that the software can manage multiple programs overlaid in the same units.
6. Project-Based Contract Administration (PBCA) – Asset Management	<p>RIHousing currently uses HDS modules to perform some of the Incentive-Based Performance Standard Tasks outlined in RIHousing’s Annual Contribution Contract with HUD. These tasks are:</p> <ul style="list-style-type: none"> • Management and Occupancy Reviews (MORs) • Processing rental adjustments • Review, verify, and authorize monthly Section 8 vouchers • Billing 	<p>OPTIONAL</p> <p>The vendor shall create API to HDS for process data or the full module to replace the HDS functions outlined in the workflow attached. If possible, add these additional IBPS tasks to the module:</p> <ul style="list-style-type: none"> • Tracking of “life-threatening and non-life-threatening health and safety issues” • Tracking and processing of renewals of expiring HAP contracts • General reporting requirement as dictated by HUD 	The vendor may replace this module with an application that meets the functional requirements including reporting to HUD and data warehouse.

Modules

1. One-Stop Application [OSA] module requirements

- A. The vendor must create an internet application with SQL database to support one-time registration for incoming applicants for RIHousing program funding, including the ability to create an I.D., reset passwords and accommodate a minimum of seventeen (17) RIHousing funding selections. The application must be able to accommodate future changes to funding programs or future additions or subtractions that may be made to the funding programs. An application must be user friendly to allow for internal RIHousing staff to make changes to funding programs in a timely manner and as needed.

I. Applicant Access Module

- a. Login and registration include contact information, email address, company address, FEIN number, and other pertinent applicant data
 - b. Login will generate an applicant I.D.; multi-members will be assigned roles related to the application
 - c. Information will be auto-saved for applicants returning to complete the application over time or for repeat applicants
- II. The Applicant Profile Entry Module
- a. Data is saved as entered and held until the submittal date
 - b. All data can be reused for future applications by the same applicant (tied to applicant I.D.)
 - c. All applicant profiles will be created one time and auto-filled when the applicant returns to the site (using applicant I.D.)
- III. Fund Selection module will be in a “tabbed” layout format
- a. Seventeen (17) funds will be available for selection. These funds should be modifiable and can be added to over time. Applicant can select one or more funds for each project submittal. Details and requirements for each fund will be provided to vendor at the time of coding.
- IV. A questionnaire will be developed based on each Fund Selection Module
- a. Each fund shall be tabbed and labeled at the top of the session
 - b. Each of the fund modules will have questions and data requirements to be provided by the applicant
 - c. No fund page should have repeat questions. If the same information is needed for each fund – same data labeling will be required and the form will auto-fill from the prior tabs
 - d. Documents may be attached [i.e., Word, Excel, pdf, jpeg, txt, CVS]
 - e. Attachment area is defined in the application form
 - f. The name of the attachment, date, time and any revisions will be tracked
 - g. Reporting function shall allow data to be easily downloaded into reports and printed.
 - h. Alert functions shall be included to inform persons in a task workflow to be notified via email.
- V. Create a pdf Package Module with title requirement for the applicant, business name, address, funding, date submitted, and contact name, email and phone number.
- a. Package creation and review module for manager approval or rejection with a project location and I.D. matched to applicant I.D. for tracking multi-project portfolios
 - b. Tracker for process stages and all projects submitted
 - c. Client can log-in to track their application
- VI. Admin Module
- a. Responsibility actions and roles for adding, change/edit, and enable/disable access to any user



- b. SOC 2 reporting is required
- VII. Reporting Module to allow for all standard SSRS functions of the SQL databases
- VIII. Data Warehouse Submittal Module, which will update the data warehouse nightly.
- IX. Email Delivery Module, which will send emails to all clients and admins
- B. Connections
 - I. Data Warehousing of all the data is required nightly to RIHousing's Data Warehouse; RIHousing will provide engineers to work with the vendor on this process.
 - II. External reporting connection to HUD, Treasury forms, and SQL SSRS reporting required.
 - III. Admin access to the applications.
 - IV. All data owned by RIHousing.
- C. Change Request process
 - I. All changes will require the RIHousing change process and approval by the Director of IT before implications from the original spec release date
 - II. All changes will be documented.
 - III. All documents requiring signatures can use DocuSign as a plugin.
- D. All SQL DB entries will be forwarded into the Project stage database.
- E. Create a visual Tracker/dashboard of the application stage of the project, which can be sorted by address, by project, by a client, by submission date, application status. Tracker shall be accessible to the applicants for their project only.
 - I. A listing of all the projects in the workflow process will be available to internal users

2. Proforma Module

RIHousing currently uses a proforma in an Excel format for data review and underwriting. Data from the proforma for approved projects is saved to SQL DB and available for use throughout the entire project life cycle, including underwriting and development. The vendor and RIHousing shall create a connection process to consolidate the data from the One Stop Application and the proforma into a Master Project Record to allow RIHousing Development Officers and Program staff to conduct the application review process and project underwriting.

RIHousing prefers to retain the use of its existing proforma; however, the vendor may replace the current proforma if they have a replacement process that is in service at other Housing Finance Agencies or can be demonstrated to be similar or better than RIHousing's current proforma. The vendor may also choose to modify the existing proforma to develop an add-on One Stop App to the front end of the proforma. If the vendor keeps the current proforma, the vendor must create a process for the funded project data from the proforma to be sent to a SQL DB.

3. Project Underwriting Module – Deal

This module integrates and populates data and files from the One-Stop App and the Proforma into a Master Project Record for those projects that receive Preliminary Board Approval. Items from the workflow below and an attachment titled “DevConnect Application Modules” shall be included. Within this module, the vendor shall develop a document management system to provide shared access to all development project documents. The document management system will create a Master Project Record for each funded development project which will be organized in a Master Project Folder. The Master Project Record contains underwriting rules, funding sources from the application stage, and program subsidies for each project. Unfunded development projects will be organized in an Unfunded Project Folder, by dates, to allow for eventual record destruction according to RIHousing’s record retention schedule.

Each Master Project record shall include:

- A. Developer information
- B. Property information
- C. Buildings/Counts
- D. Acquisition types
- E. Preservation information
- F. Construction Budgets
- G. Selected Fund Sources
- H. Selected Programs/Subsidies
- I. Project-specific compliance regulations
- J. Operating Expenses
- K. Funding allocation to a Project– program and funding amount
- L. Loan set-ups with Loan number for tracking for the Project
- M. Project Cost, Purchase Order, Invoicing, Payments, and Change Requests
- N. LURA restriction layout and breakdown modules for each funding source
- O. Stage Tracker of the following steps in the Project Stage
 - I. App submitted date and time
 - II. Reservation task
 - III. Underwriting task
 - IV. Board Approval Stage
 - V. Final allocation task
 - VI. Construction Phase
 - VII. Loan Setup
 - VIII. Carryover task
 - IX. Closeout task

4. Project Stage

Design and Construction - This module is optional. RIHousing currently uses a customized module to perform this function. If the vendor proposes to replace this module, it must include two primary elements: 1) Project Development and 2) Construction Accounting. All data collected in this module must be part of the Master Project Record and directed into the data

warehouse upon project completion. Documents must be accessible internally across areas of the corporation depending upon approved authorized access.

- A. Project Development – application must provide the functionality to track and review submissions at multiple stages of project development approvals – Preliminary through Close-out. Project submissions required in this module must be aligned to the current Smartsheet inventory checklist. Submissions include pdf documents and plans. Notes and comments area must be included.
- B. Construction Accounting – vendor must develop a data collection and processing system to provide for the following functionality:
 - I. Budget setup and approvals process by RIHousing
 - II. External portals accessible by contractor for requisition submission
 - III. Contractor access to RIHousing’s requisition software if needed
 - IV. Prepare and maintain a schedule of values and retainage
 - V. Payout G702 and G703 format required
 - VI. Payout tracking and approval process
 - VII. Itemized punch list and closeout
 - VIII. Direct transactions into the project database, upload to data warehouse upon submitting for payments and send emails to the payment approver requesting specific action

5. Asset Management and Compliance

The current process is in pdf forms, InspectCheck, Smartsheet, Excel, Word, Access database, HDS module, and Compliance module. Requirements of this module include:

- A. Tracking of all funding sources including ancillary funding sources, if used – includes BHRI, Home, NOP, State bonds, other
- B. Audited Financials
- C. Profit & Loss statements by HUD chart of accounts
- D. Balance Sheet
- E. Cash flow
- F. Compliance Module
 - Selection of a set number of assets to test and assign a Compliance ID to the request.
 - Check off sheet for the asset – acceptable, findings
 - Remediation tracking to the selection test and findings based on the Compliance ID and Asset
- G. The inspection module - currently using the Inspect Check application - if replaced, all the features and reporting must be accounted for and verified by the inspection team to meet the HUD requirements.
- H. Tenant Compliance modules will feed data to the Asset Managers for projects.
- I. Risk Rating Module
 - Convert current Access database to SQL database
 - Migrate legacy data into the new SQL database after the GO LIVE date of the new application.

- The vendor should include a unit cost to migrate legacy data of the Risk Rating Module from Access to SQL
- Create a historical trending report for inspections and findings to determine the next risk rating
- Transfer all data to the data warehouse nightly

6. Project-Based Contract Administration (PBCA)

RIHousing currently uses HDS modules to perform some of the Incentive-Based Performance Standard Tasks outlined in RIHousing's Annual Contribution Contract with HUD. The vendor may replace this module with an application that meets the functional requirements, including reporting to HUD, and data warehouse.

These tasks are:

- A. Management and Occupancy Reviews (MORs)
- B. Processing rental adjustments
- C. Review, verify and authorize monthly Section 8 vouchers
- D. Billing

The vendor shall create API to HDS for process data or the full module to replace the HDS functions outlined in the workflow attached. If possible, add these additional IBPS tasks to the module:

- A. Tracking of "life-threatening and non-life-threatening health and safety issues."
- B. Tracking and processing of renewals of expiring HAP contracts
- C. General reporting requirement as dictated by HUD

Project Plan and Pricing

The vendor shall submit a project implementation plan with pricing and timing for project milestones. The vendor will be required to perform as indicated, and payment shall be conditional upon completion of work.

Provide timing and pricing for Project Milestones as follows:

- 1) Execution of the contract agreement.
- 2) RIHousing Project Team to host kick-off calls with vendors.
- 3) Project Team and vendor to attend two-day on-site review (remote meeting may be required due to COVID-19) of the function's specs and workflow to ensure alignment with the software application process stages.
- 4) Coordinate with the RIHousing engineering team to initiate development of applications.
- 5) Enter the design and development phase, coordinating with RIHousing Project Team.

- 6) Demo of the applications by the vendor every three weeks after the start of development to ensure the progress of the schedule.
- 7) Two weeks prior to GO LIVE, the application will freeze to ensure stable test/UAT and Production codes are in place.
- 8) Any changes to the project plan, timelines, milestones, or project implementation must be documented by the vendor and submitted as a change request after Payment a. RIHousing shall review and must approve/deny change requests prior to change orders in writing prior to the initiation of additional work.
- 9) Documentation of work.
- 10) Staff training sessions.

Bid Pricing

Primary Bid:

Provide pricing and timing to perform the FULL WORKFLOW (Modules 1, 2, 3, 4, 5, and 6) from end to end. Include the estimated schedule of delivery and support required from RIHousing teams.

Alternate Bid 1:

Provide pricing and timing for REQUIRED Modules only.

Alternate Bid 2:

Provide pricing and timing for ANY of Modules 1 through 6 separately.

For all bids:

Pricing must include work with the RIHousing engineering team to provide for the interconnection of any modules with the existing modules that will stay in place.

Deliverables

- 1) The vendor will develop an application that will be accessible from the internet and will support the listed design modules, features, and operational data connection for RIHousing.
- 2) If the vendor is contracted for the Alternate 1, then the vendor will work with the RIHousing engineering team to develop interconnections to any existing modules that will remain in place.
- 3) The documentation of the architecture overview with data flow drawings, features listed with defined expectations, user guide with admin steps as part of the final delivery, must be provided in draft form and available for review by RIHousing before mid-term payout.
- 4) The vendor will train the Real Estate Development team in administrative and service support functions.
- 5) The vendor will provide technical on-call support to the RED Team for one year after the GO LIVE date of the application. Support may be extended as needed by RIHousing.

Project Requirements

Data Flow Model Drawing:

Web/Mobile >> application enter >> application server/eSQL >> SQL RFP, SQL BCD, SQL PII, SQL HIPPA >> DW >> Reporting engine

Submit:

- Database for Submitted Projects (Preliminary approval from Board of Commissioners)
- Database for Approved Projects (Firm approval from Board of Commissioners)
- Database for Process Control – database must provide a tracking report of where the application is in each stage of review and approvals

Requirements:

- .Net
- ASP
- SQL 2012, 2016, 2019
- GLBA
- SOC 2 data center
- PII datastore
- HIPPA datastore
- RIHousing owns all code
- No modules can be resold without RIHousing approval



DevConnect_Applic
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