

**AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT**

1. <u>Amendment/Modification No.</u> <b>A00001</b>	2. <u>Effective Date</u> June 7, 2017	3. <u>Requisition/Purchase Order No.</u>	4. <u>Project No. (if applicable)</u> IT 17-R-0022
5. <u>ISSUED BY</u> Housing Authority of the City of El Paso, Texas Procurement Department 5300 E. Paisano Dr. El Paso, TX 79905-2931 Mr. Juan Pulido, Procurement Manager		6. <u>ADMINISTERED BY (if other than Item 5)</u> Housing Authority of the City of El Paso, Texas Public Housing Department 5300 E. Paisano Dr. El Paso, TX 79905-2931 Tel: 915-849-3789 Fax: 915-849-3868 <b>erocha @hacep.org</b>	
7. <u>NAME AND ADDRESS OF CONTRACTOR</u> ( No., Street Name, County, State & Zip Code)		8a. <u>Amendment of Solicitation No.</u> IT 17-R-0022	
		8b. <u>Dated (see item 10)</u> June 7, 2017	
		9a. <u>Modification of Contract No.</u>	
		9b. <u>Dated (see item 12)</u>	

**10. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATION**

The above numbered solicitation is amended as set forth in Item 13. The hour and date specified for receipt of Offers is:

is extended  is not extended.

Offerors must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended by one of the following methods:

(a) By completing Items 7 & 14, and returning \_\_\_\_\_ copy (ies) of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter, email or fax which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGEMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such a change may be made by email, fax or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.

**11. ACCOUNTING AND APPROPRIATION DATE (if required) PHA****12. THIS ITEM APPLIES ONLY TO MODIFICATIONS OF CONTRACT IT MODIFIES THE CONTRACT NO. DESCRIBED IN ITEM 13.**

<input type="checkbox"/>	A. This change order is issued pursuant to (Specify Authority) The changes set forth in Item 13 are made in the Contract No. in Item 9a.
<input type="checkbox"/>	B. The above numbered contract is modified to reflect the administrative changes (such as changes in paying office, appropriation data, etc). Set forth in Item 13 pursuant to the authority of FAR 43.103 (b).
<input type="checkbox"/>	C. This supplemental agreement is entered into pursuant to the authority of:
<input type="checkbox"/>	D. Other (Specify type of modification and authority)

E. **IMPORTANT:** Contractor  is not  is required to sign this document and return ALL copies to the issuing office.

**13. Description of amendment/modification:**

**Amendment No. A00001. Pre-proposal meeting and questions received via email , Attachments A, B, C and D**

14a. <u>NAME AND TITLE OF SIGNER (Type or print)</u>		15a. <u>NAME AND TITLE OF CONTRACTING OFFICER (Type or print)</u> <b>Gerald Cichon, Chief Executive Officer</b>	
14b. <u>OFFEROR/CONTRACTOR</u>  _____ (Signature of Authorized Person)	14c. <u>Date Signed</u>	15b. _____ (Signature of Contracting Officer)	15c. <u>Date Signed</u>
APPROVED AS TO FORM: _____ HACEP Legal Counsel		DATE: _____ HACEP Form 001	

## **IT 17-R-0022 Consulting Services for Enterprise Resource (ERP) Implementation**

### **QUESTIO AND CLARIFICATIONS SUBMITTED VIA EMAIL**

1. Has HACEP established a Steering Committee?  
Response: Yes, HACEP has a Governance Steering Committee.
2. What is the configuration of HACEP housing inventory in terms of programs (traditional public housing, RAD, Mixed Financed, LIHTC, PBRA, etc.)?  
Response: At HACEP we have Public Housing, RAD, Mixed Financed, LIHTC, PBRA, HCV, HOME, and PBV.
3. What is the planned conversion dates for the RAD properties?  
Response: Conversion of RAD properties started in 2015 and will continue until 2019.
4. Will HACEP be implementing Portals or Mobile Devices?  
Response: Both Portals and Mobile devices.
5. Will HACEP be utilizing the Cash Management module for rent collections?  
Response: We are utilizing Cash Management for rent collections in Yardi and GP.
6. Does HACEP have a preferred training method (train-the-trainer using HACEP staff, Software Vendor provided End User training, etc.)?  
Response: At HACEP we will be doing, train-the-trainer, End-User-training and possibly a Software Vendor (Yardi or a Consultant) and HACEP staff.
7. Does HACEP have a training facility?  
Response: HACEP has an IT Training Lab with 26 terminals.
8. What are the legacy systems that contain data that needs to be converted?  
Response: MAPPS, GP, EDMS, Ariett, HCV, Work Orders, Portals w/Landlord and Resident data, and Pre-Applications.
9. Will HACEP staff handle the data extraction, conversion and verification of data?  
Response: HACEP will handle the data extraction and verification of data, Yardi will handle the conversion of data.
10. Pages 23 and 24 of the RFP appear to be duplicates. Can HACEP please provide the missing page of terms and conditions?  
Response: see attached below which replaces page 24
11. It is noted in the Overview section of the Scope of Work that “other related systems” may be replaced. Would HACEP please clarify whether the selected consulting firm will perform the requested tasks related to those systems, as well as the ERP system? If so, please identify those systems.  
Response: “other related systems” – Those systems are legacy systems that HACEP will phase out over time.
12. As it relates to item #3 in the Scope of Work, does HACEP have an estimated number of processes to be analyzed and redesigned, for the purpose of estimating work effort and related costs?  
Response: Yardi design sessions will define processes and workflows that will define how we integrate into 7s.

13. As it relates to item #4 in the Scope of Work, does HACEP have an estimated number of policies and procedures to be created, for the purpose of estimating work effort and related costs?  
**Response: Same answer as identified in question #2.**
14. As it relates to item #5 in the Scope of Work, what type of analysis (e.g. dashboards, monthly reporting, cash disbursements, budgeting) does HACEP expect?  
**Response: Item #5 defines the type of analysis needed, but not limited to listed items.**
15. As it relates to item #6 in the Scope of Work, would HACEP please confirm that the desired assistance with cash forecasting and financial projections are in fact for the agency as a whole and not just for this ERP initiative?  
**Response: Cash forecasting and financial projections are for the agency as a whole.**
16. For the numbered Scope of Work items on page 13, would HACEP please confirm under which item the related costs should be accounted for in the cost sheet provided?  
**Response: Accountability for 1B & 1C (Reference page 11).**
17. For the numbered Scope of Work items on page 13, please indicate at what point in the implementation process they should be performed. For example, should the third service item take place prior to the implementation or following go-live of the new system?  
**Response: The recommendation should come from the consultant, based on prior Yardi implementations and knowledge.**
18. For the tasks listed on pages 15 and 16, would HACEP please confirm that the selected consultant will be acting in a project management role, as opposed to a hands-on system integration role?  
**Response: Consultant will be a hands-on systems integrator.**
19. Is HACEP able to provide its most recently audited financial statement including the Management's Discussion & Analysis (MD&A)?  
**Response: See Attachment C**
20. Is HACEP able to provide its most recently prepared financial report for its Board or Finance Committee?  
**Response: See Attachment C**
21. Can HACEP provide an organizational chart of its finance staff?  
**Response:**
22. Does HACEP have a preference for a local firm for this work? If so, what weight will that preference carry in the evaluation?  
**Response: No preference, open to all to bid.**
23. Has HACEP established a budget for the requested consulting services? If so, can it be shared?  
**Response: Yes, a budget has been established. It cannot be shared now. It has not been approved by the Board.**
24. Does HACEP expect that offerors will return completed Certificates of Insurance with the proposal or upon contract award?  
**Response: Yes, certificates of insurance need to be presented at time of proposal.**

25. Pages 23 and 24 of the RFP appear to be duplicates. Can HACEP please provide the missing page of terms and conditions?

Response: Sorry, they are duplicates, they are being attached on Addendum as Attachment B

26. If an offeror objects to any of the terms and conditions set forth in the RFP, how can they best take exception to that term? Can exceptions be included in the proposal and, if so, where?

Response: Yes, please include in proposal. Please include a separate document identifying objections to the Ts&Cs.

27. Can HACEP provide an MS Word or other editable version of the RFP to facilitate the completion of its Cost Sheet and other forms? If not, would it be acceptable for offerors to reproduce the format of this table in their proposals?

Response: We are comfortable with a reproduction or we will provide a word version of the Cost sheet.

### **QUESTIONS AND CLARIFICATIONS FROM THE PRE-PROPOSAL MEETING ON 5/31/17**

1. Background Question: Understand you have already selected the supplier for the system, am wondering how much information about that system had already been shared with your organization, in another words, all the folks it is going to impact? Want to know how the users are going to be impacted with the new software? How much background has been done with the users already?

Response: Basically, the actual RFP was crafted in consultation with all the internal players, anywhere from Finance, Work Orders and Procurement Housing Choice Voucher Departments. Staff was interviewed and attended meetings to prepare the RFP. We also crafted the specifications. Upon release of the RFP we invited perspective vendors that expressed an interest. We actually sough presentations from the vendors and the internal customers attended those sessions. At this point we are very familiar with this system and ready to implement it.

2. Question: How many projected user and non-users of the system would that be when it is finally implemented?

Response: We do not have that number yet but it will be provided in the addendum  
Clarification: ERP for the agency wide use, approximate from 150 – 250 users

3. Question: Reading on the scope of work there appears to be a lot of changes that are going to occur based on redesign, work processes and departmental structures that may change based on capabilities and capacity, these things normally cause significant change in the organization. I see you called out training and education in the RFP, I did not see a reference to organizational change management. Could you stress how important that component is for successfully implementing and people to adopt the changes that is going to occur based on this implementation?

Response: We are meeting internally discussing the change, we have a selected group of employees working on those changes and educating other departments of the upcoming changes.  
Clarification: We are utilizing, Train-the-Trainer Method

4. Question: So there is value in that type of service being a part of a proposal in terms of the whole implementation of the new technology, bringing in a change management component would be of value to assist with the work that is already going?

Response: Maybe the specifications were not very clear but we should have emphasized that internally we are doing a lot of this work so whomever we select is really going to be supplementing what we are already doing.  
Clarification: Yardi is contracted to do change management in the implementation.

5. Question: On the scope of work, page 13; type of services that are questioned, specially no. 5 and no. 6, around accounting and financial analysis, assistance with cash forecasting and financial productions; would these be placed prior to implementation or post implementation of the new system?

Response: This would probably be before implementation but we can clarify it.

Clarification: The analysis will be done during the design phase.

6. Question Repeated: Curious to know at what point during the implementation process you would work with the consultant to provide those services?

Response: Will Clarify?

Clarification: Work will commence upon contract award, according to the implementation schedule provided on the RFP.



PRE-PROPOSAL CONFERENCE

SOLICITATION NO: IT 17-R-0022; Consulting Services for Enterprise Resource Planning (ERP) Implementation

DATE: June 2, 2017 *Mr. Steve Nolan, IFA Site Visit*

NAME OF ATTENDEE	COMPANY NAME OR DEPARTMENT	PHONE NUMBER	FAX NUMBER	EMAIL ADDRESS
<i>Steve Nolan</i>	<i>IFH Solutions</i>	<i>678 463-4510</i>		<i>snolan@ifhsolutions.com</i>
<i>Marcela Chavez</i>	<i>HACEP</i>	<i>3621</i>		<i>chavez@hacep.org</i>
<i>Miriam Delgado</i>	<i>HACEP</i>	<i>849-3795</i>		<i>mdelgado@hacep.org</i>
<i>Jorge Vazquez</i>	<i>HACEP</i>	<i>849-3797</i>		<i>jvazquez@hacep.org</i>
<i>Desserie Blalack</i>	<i>HACEP</i>	<i>849-3732</i>		<i>dblack@hacep.org</i>
<i>Daniel Cantu</i>	<i>HACEP</i>	<i>849-3697</i>		<i>dcantu@hacep.org</i>

## ATTACHMENT B

product of work shall be deemed accepted as submitted if the HA does not issue written comments and/or required corrections within 30 days from the date of receipt of such product from the Contractor.

- (b) The Contractor shall make any required corrections promptly at no additional charge and return a revised copy of the product to the HA within 7 days of notification or a later date if extended by the HA.
- (c) Failure by the Contractor to proceed with reasonable promptness to make necessary corrections shall be a default. If the Contractor's submission of corrected work remains unacceptable, the HA may terminate this contract (or the task order involved) or reduce the contract price or cost to reflect the reduced value of services received.

### 13. Interest of Members of Congress

No member of or delegate to the Congress of the United States of America or Resident Commissioner shall be admitted to any share or part of this contract or to any benefit to arise there from, but this provision shall not be construed to extend to this contract if made with a corporation for its general benefit.

### 14. Interest of Members, Officers, or Employees and Former Members, Officers, or Employees

No member, officer, or employee of the HA, no member of the governing body of the locality in which the project is situated, no member of the governing body in which the HA was activated, and no other public official of such locality or localities who exercises any functions or responsibilities with respect to the project, shall, during his or her tenure, or for one year thereafter, have any interest, direct or indirect, in this contract or the proceeds thereof.

### 15. Limitation on Payments to Influence Certain Federal Transactions

(a) Definitions. As used in this clause:

"Agency", as defined in 5 U.S.C. 552(f), includes Federal executive departments and agencies as well as independent regulatory commissions and Government corporations, as defined in 31 U.S.C. 9101(1).

"Covered Federal Action" means any of the following Federal actions:

- (i) The awarding of any Federal contract;
- (ii) The making of any Federal grant;
- (iii) The making of any Federal loan;
- (iv) The entering into of any cooperative agreement; and,
- (v) The extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.

Covered Federal action does not include receiving from an agency a commitment providing for the United States to insure or guarantee a loan.

"Indian tribe" and "tribal organization" have the meaning provided in section 4 of the Indian Self-Determination and Education Assistance Act (25 U.S.C. 450B). Alaskan Natives are included under the definitions of Indian tribes in that Act.

"Influencing or attempting to influence" means making, with the intent to influence, any communication to or appearance before an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with any covered Federal action.

"Local government" means a unit of government in a State and, if chartered, established, or otherwise recognized by a State for the performance of a governmental duty, including a local public authority, a special district, an intrastate district, a council of governments, a sponsor group representative organization, and any other instrumentality of a local government.

"Officer or employee of an agency" includes the following individuals who are employed by an agency:

- (i) An individual who is appointed to a position in the Government under title 5, U.S.C., including a position under a temporary appointment;
- (ii) A member of the uniformed services as defined in section 202, title 18, U.S.C.;
- (iii) A special Government employee as defined in section 202, title 18, U.S.C.; and,
- (iv) An individual who is a member of a Federal advisory committee, as defined by the Federal Advisory Committee Act, title 5, appendix 2.

"Person" means an individual, corporation, company, association, authority, firm, partnership, society, State, and local government, regardless of whether such entity is operated for profit or not for profit. This term excludes an Indian tribe, tribal organization, or other Indian organization with respect to expenditures specifically permitted by other Federal law.

"Recipient" includes all contractors, subcontractors at any tier, and subgrantees at any tier of the recipient of funds received in connection with a Federal contract, grant, loan, or cooperative agreement. The term excludes an Indian tribe, tribal organization, or any other Indian organization with respect to expenditures specifically permitted by other Federal law.

"Regularly employed means, with respect to an officer or employee of a person requesting or receiving a Federal contract, grant, loan, or cooperative agreement, an officer or employee who is employed by such person for at least 130 working days within one year immediately preceding the date of the submission that initiates agency consideration of such person for receipt of such contract, grant, loan, or cooperative agreement. An officer or employee who is employed by such person for less than 130 working days within one year immediately preceding the date of submission that initiates agency consideration of such person shall be considered to be regularly employed as soon as he or she is employed by such person for 130 working days.

"State" means a State of the United States, the District of Columbia, the Commonwealth of Puerto Rico, a territory or possession of the United States, an agency or instrumentality of a State, and a multi-State, regional, or interstate entity having governmental duties and powers.

(b) Prohibition.

- (i) Section 1352 of title 31, U.S.C. provides in part that no appropriated funds may be expended by the recipient of a Federal contract, grant, loan, or cooperative agreement to pay any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with any of the following covered Federal actions: the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.

- (ii) The prohibition does not apply as follows: