JACKSONVILLE HOUSING AUTHORITY (JHA)

Addendum Number: Four (4)   Proposal Number: CS-001-20

Title of proposal: **Electronic Document Management / Workflow Software**

This addendum is hereby incorporated into the contract documents for the above project.

This addendum is for the purpose of clarifications and amendments.
Dated: May 23rd, 2020

The following items are clarifications, additions and revisions to, and shall take precedence over the original specifications dated as issued for proposal on April 28th, 2020.

Additional questions have been received by multiple sources. The JHA has attempted to answer all questions in the best manner possible; however, some of the questions asked are ones we expect the winning company to help us answer:

1. Will a train-the-trainer approach best support the JHA training needs? **Yes**
2. Do you have a centralized training facility that can be used? **Yes**
3. What email software is currently being used? **Yardi**
4. Do you have a centralized email address that applicants / clients / residents / landlords use? **Yes**
5. What fax software is currently being used? **None**
6. Does desk-side electronic signature capture refer to internal system users OR the need to capture signatures from external individuals? **need to capture signatures from external individuals**
7. Is full text, zoned OC and/or intelligent character recognition indexing a requirement of the RFP or a technology roadmap item? **technology roadmap item**
8. Is search/retrieval from a browser-based interface a requirement of the RFP or a technology roadmap item? **technology roadmap item**
9. Do you know how many workflows will be required to support your Program offering? **No**
10. Are the required workflows centered on document approval and/or records management (e.g. disposition policies) or do they include process workflows to automate line of business functions? **automate line of business functions**

11. Do you have a preference for a premise-based software solution, vendor hosted solution (hosted by the software provider), or a commercial FedRAMP hosted solution (Azure, AWS, etc…)? **No, preference, just best option.**

12. Please provide the number and models of scanners and MFDs that will be used to scan into the Document Management software. **Needs to be defined based on the software presented.**

13. How many total users will need access to the Document Management Software? **Approx 150 users** How many users would need concurrent access to the Document Management Software? **Not sure we will need to discuss.** How many users would be active participants in automated workflow processes? **Not sure we will need to discuss.**

14. Can you provide specific workflow processes you are looking for the vendor to configure in the proposed ECM solution? Can you provide any workflow diagrams and descriptions of the processes to help the vendor provide a level of effort for the professional services to configure the workflow solutions? **We do not** If not, would you be comfortable with a proposal providing a block of service hours for workflow configuration - assuming those workflows we typically provide to PHA customers (RFTA, Recert, Wait List, etc...) to await a formal discovery after contract award? **Yes**

15. Can you provide several examples of the use cases you envision for electronic signatures (desk side) versus electronic signatures for external signers? **They would be forms generated from our Yardi system or contracts for service. We are working on a 3rd party software for lease renewal and new intakes, so I'm not sure at this time what the requirements will be.**

16. Are you seeking to have the vendor responding to this RFP to propose scanning services to convert the paper back files of current tenants? **Possibly, yes**

17. If you are looking for scanning services to address the back files of current tenants, please provide: 1) an estimate of the number of pages to be scanned; **Approx 500 pages per tenant** 2) a count of the number tenant records to be scanned; **Approx 10,000 tenants** 3) confirm that a match and merge database (Yardi) has the required tenant data records for indexing and will be available to automate the indexing process. **I do not understand part 3 of the question**

18. Please confirm that you are looking for automated form recognition without using bar codes as a desired component of this solution. **Yes**

19. Please provide the number of form types that you are looking for the vendor to configure automated document recognition for as part of the services proposed in this RFP response. **Approx 75**

20. Are you looking for zonal OCR/ICR capabilities (Advanced Capture) to automatically index scanned documents? If so, can you provide a count of the number of document types you want to have configured for Advanced Capture? **None**

21. Are you looking for this solution to generate a packet of various documents, including electronic forms (ie 50058, verification of employment, release for information, etc...) using tenant data from the Yardi software solution to generate the packet from document templates stored in the ECM solution to help automate the recertification process? **Yes**

22. Are you looking for the vendor to provide services for the creation of electronic forms in the RFP response? **No** If so, can you provide samples of the forms you are looking to have the vendor configure as Electronic Forms as part of the proposed services?

23. Are you looking for the vendor to provide services to create a specific workflow process? If so, can you provide details surrounding any workflows you'd like created as a part of the initial project scope? **Yes. Will need to discuss if awarded contract with multiple departments.**

24. Can you provide any insight into how barcodes are currently being used and how you plan to use them in future-state? **Currently we are using barcoding for our asset tracking and hope to use it for inventory in the future.**

25. Is the Authority open to a digital delivery of the RFP response, given the shelter in place orders that are still in effect across the country? **Yes, we will now allow for electronic delivery of documents. They MUST be submitted via the Housing Agency Marketplace, DO NOT email your submittals to me directly as it will be deemed unresponsive and discarded.**

26. Can JHA provide diagrams and/or descriptions pertaining to the key processes that you want to automate utilizing workflow? **Will need to discuss if awarded contract with multiple departments.**

27. Concerning the processes to be automated, please describe the number of users involved in each process? **It depends on the process**

28. What is the total number of anticipated users for the initial implementation of the electronic document management/workflow solution? **150**

29. Will JHA consider a hosted solution for the electronic document management/workflow solution? **Yes**

30. Regarding this requirement "Provide concurrent user licenses for accessing the Document Management System". **Unknown at this time** Will JHA accept named user licensing approach as well? **Yes**

31. Will JHA consider a software subscription model for the electronic document management/workflow solution? If so, shall that subscription model pricing be included in the Proposed Fees? **Yes**
32. Has there been budget amount funded for this project for 2020-2021? If so, can you please disclose the budget amount? **The agency has the funds to complete this project but is not required to supply potential bidders with that amount, this information will not be disclosed.**
33. Since you are scanning documents into the solution, how many users are involved in scanning and how many scan stations do you anticipate utilizing? **Approx 75 to 100**
34. Does JHA require electronic records management that requires the retention cycle of a record be triggered by an event, or a passage of time, or by both (an event can trigger the start of the retention period which is based upon the length of time the record is to be retained? **Yes, both**
35. Would the JHA require the ability to place Holds temporarily on records to prevent modification or destruction of records and exclude from final disposition until Hold is removed? **Yes**
36. How many individuals would the Housing Authority like trained as End Users of the solution? **75 - 100**
37. How many individuals would the Housing Authority like trained as administrators for the solution? **5**
38. From "Desired System Functionality List". Section for Indexing. 1. Does your system support fielded indexing? Please clarify what is meant by "fielded indexing". **Easy random access to any record given its file key. The key must be such that it uniquely identifies a record.**
39. From SOW – "Integration with our Housing Authority Management System: - Can you provide the expected integration use cases? **Yardi annual recert process**
40. How many external audits are typically completed in a month, year? How many estimated users need to access the system externally to complete audits? **10% is the industry standard but is subject to change. Possibly 5**
41. From "Provide options for both programmatic and non-programmatic integration to other business and operations applications without requiring additional software. What are the estimated number of programmatic application integrations required? **Unknown** Can you provide any use cases or examples? What are the estimated number of non-programmatic application integrations required? **Unknown** Can you provide any use cases or examples? **We have no use case currently created**

42. From "Provide ability to create dynamic electronic forms to use as part of the workflow process" - How many estimated electronic forms will need to initially be configured? **Unknown**

43. If we have a cloud offering as well as on-premise, should we include both in the Pricing? **Yes**

44. Was the pre-bid mandatory? **No**

45. On Attachment G, the first page shows bid CS-001-20 Document Management and the following pages show CS-001-19 Lawn Services. Is that a typo, or do I not have the correct information needed to bid? **That is a typo, the document has been corrected and re-attached to the bid docs in the Housing Agency Marketplace platform.**

46. How many staff members will need full access rights and how many would need read only retrieval rights to the scanned documents? **Most staff will need read right in their designated area and just read in other areas.**

47. Have you seen any demonstrations of Document Management Solutions prior to the release of this RFP? If yes, can you please provide us the name of the Solutions and Vendors? **No**

48. From Desired System Functionality List section Integration with Existing Systems / applications: "Does your system integrate with X's letter and form generation module for automated filing and indexing?" Can you please provide more information pertaining to the letter and form generation module? What are the integrations options - Open API, does it export forms with delimited files? If the ECM product being proposed has a document composition capability and forms module, could these be considered as components of your ECM Solution? **Yes**

49. Is there a preference for perpetual software licenses or subscription? **We are open to both options**

50. What version of Yardi Voyager is JHA using? **Yardi 7s** Is Yardi a premise based or cloud based solution? **Cloud based** Is it SQL based? **Yes** What level of integration do you need? **Will be determined during discovery**

51. What key processes are you looking to automate and manage through configurable workflows? **Will be determined during discovery** Will you provide specs and requirements for these processes?

52. What other main line of business applications does JHA utilize outside of Yardi? **Microsoft.**

53. Is JHA looking to host the selected platform on-premise or have a hosted platform? **We are open to both options**

54. Will JHA want to be empowered/trained to administrate and create workflows within the application or is the expectation that the selected vendor will fill this role? **We want you to train the trainer**

55. Is JHA currently utilizing any application for capturing desk-side digital signatures? **No**

56. What version of Microsoft Office Suite is JHA using? **We have a bid in process for O365**

57. Is the application "X", referenced in Attachment E - Integration with Existing Systems/Applications - Item #2 & #4, referring to Yardi? **Yes**

58. What is the vision for integrations between Yardi and the document management solution? **A smooth flow between the two applications**

59. What qualifications are you looking for in an implementation partner? For example, we have multiple Microsoft Gold and Silver Competencies, Microsoft Certified Masters, etc.; will the proposal scoring take our technical credentials into account? **These qualifications are good to have but are not required for the bid solicitation**

60. Did any contractor or vendor assist with the development of this solicitation or provide you with an initial evaluation, proof of concept, demonstration, pricing, or any other analysis related to this procurement? **No**

61. Can you please provide an organizational chart the includes all departments/business units that will use the solution? **Included as a separate attachment**

62. Regarding your Electronic Records Management requirements:
    a. How many record categories/series/types need to be configured for this specific solution? **Unknown at this time**
    b. Is Physical Records Management within the scope of this solicitation and if so, how many physical records need to be managed? **Only for the initial scanning**

63. On a scale from 1 to 5 where 1 represents a vendor in the Jacksonville area and 5 represents a vendor in another state such as California, what is your preference for vendor proximity for this project? In other words, please rate your preference for local vendors. **That requirement is not important as long as the support is sufficient**

64. In attachment C1, section 2.a.2, the phrase 'showing the time specified for receipt', is this referring to the deadline time? 3pm on June 2? **Yes, that is correct.**

65. In attachment D, question 7, what is a Resident Business Entity (RBE)? Does this refer to a business with a State of FL business license? **A resident business entity is one that is owned by a resident of public housing.**

66. In attachment D, question 9, is this referring to a State of FL business license #? We are incorporated in NY but also do business if FL. Our officers are also permanent residents of Miami, FL. Are we required to be registering with the State of FL for this contract? **You are not required to have a State of Florida business license to participate in the solicitation; however, if you are awarded the contract you will be required to obtain a Jacksonville / Duval County Business Tax Receipt that allows you to do business in Jacksonville / Duval County.**

67. In attachment D, questions 11-13, are we required to have Workers Compensation and General Liability insurance? We currently only have a professional liability insurance policy. **Worker's Compensation is not required to participate in the solicitation; however, if you are awarded the contract and will have a physical presence at any of our properties you will be required to have Workers Compensation Insurance.**

68. In attachment F, F1 and F2, are we required to be a Section 3 business? Are these three forms required? **You are not required to be a Section 3 vendor to participate in this solicitation; however, if awarded the contract you will be required to participate. These forms explain how that can be done.**

69. In the RFP, section 2.1, page 8, the bullet 'Provide automated generation of document 'packets' (i.e. recertification packets)'. Is this referring to multipage digital form's packets? **Yes, the documents are produced from the Yardi application.**

70. In the RFP, section 2.1, page 8, the bullet 'Provide direct access to documents from the display of business and operations applications through some form of application enabler.' Is this referring to MS Sharepoint as the 'business and operations application'? Do you know which software this is referring to? **MS Sharepoint could be an option.**

71. Can you please provide a use case or example of what you are looking for here?
    a. "Does your system provide indexing from external data sources, in particular from our Housing Management system?" **We have not created any use cases. Discovery will be necessary as part of the project**

72. Can you please provide an example of a minor and major version?

73. "Does your system offer major and minor versions?" **When you track major and minor versions, the major versions are whole numbers, and the minor versions are decimals.** Can you please provide an example of this feature?

a. "Does your system provide the ability to support multi-attribute search?" **Allows the extraction of a large number of different quality parameters**

74. Can you please provide an example of the type of integration you are looking for?
    a. "Does your system integrate with our housing authority management software (X) at both the data and user interface levels?"

75. Can you please provide a user case or example of this?
    a. "Do you allow the same document to be a member of multiple folders? **The same file exist in a resident file and duplicate file for legal action**

76. Remote project delivery typically enables us to reduce project duration and costs. Most of the projects we do *could* be delivered 100% remotely however, we sometimes find it useful to be onsite during discovery meetings, training, etc. Considering the potential effect on project duration, resource availability, and cost on a scale from 1 to 5 where 1 represents "100% **onsite** project delivery" and 5 represents "100% **remote** project delivery", what are your requirements on this continuum? **We have no problem with remote delivery to reduce cost. Some on-site work may be necessary.**

77. Did any contractor or vendor assist with the development of this solicitation or provide you with an initial evaluation, proof of concept, demonstration, pricing, or any other analysis related to this procurement? **No**

78. We are a SharePoint and Office 365 focused consultancy and have successfully combined these platforms with best of breed third party software products (as needed) to implement comprehensive electronic document management and workflow solutions; given what you know about SharePoint/O365, including any as-needed 3rd-party add-ons, on a scale from 1 to 5 where 1 represents "Will not meet our requirements" and 5 represents "We believe SharePoint or O365 is the best platform for our needs", what represents your view on the continuum? **We are open to all solutions**

79. Regarding the requirement stated as the "system can support 1 user or 1,000 users without major changes":
    a. How many users should we account for as it relates to product pricing, implementation services scoping, etc.? **Approx 150 users**
    b. Can you please provide an organizational chart the includes all departments/business units that will use the solution? This also relates to pricing.

80. Regarding your Electronic Records Management requirements:
    a. How many record categories/series/types need to be configured for this specific solution? **We use the Sunshine law and there are hundreds of different categories with multiple time frames**

b. Is Physical Records Management within the scope of this solicitation and if so, how many physical records need to be managed? **Yes. Unknown record count**

81. On a scale from 1 to 5 where 1 represents "An on-premises solution housed in your facility, managed and maintained by you" and 5 represents "A cloud-based solution administered by you", what best represents the desired solution on this continuum? **We are open to all solutions**

82. On a scale from 1 to 5 where 1 represents a vendor in the Jacksonville area and 5 represents a vendor in another state such as California, what is your preference for vendor proximity for this project? In other words, please rate your preference for local vendors. **This is not an issue as long as service is appropriate**

83. Regarding your experience and use of with SharePoint and/or O365:
    a. What versions are you currently licensed for (e.g. SharePoint 2019, SharePoint Online G3, etc.)? **We do not currently have any licenses for SharePoint. We are currently out for bid to convert the agency to 0356**

84. On a scale from 1 to 5 where 1 represents "None" and 5 represents "Expert", can you please indicate what SharePoint/O365 skills you currently have in house in terms of: **We use a 3rd party vendor for all our network and hardware support. They have expert knowledge of SharePoint**

85. The product we propose for document imaging is based on the number of documents scanned per year:
    a. How many *documents per year* do you anticipate scanning in Year 1? **We have client files that consist of an average of 500 pages and approx 10,000 clients**
    b. What is the anticipated growth rate for future Years? **Unknown**

86. Regarding the requirement stated in the RFP as "Integration with our Housing Authority Management System":
    a. Is actual integration in scope for this solicitation or is the intent to ensure that the system has integration capabilities? **To be determined**
    b. If integration is in scope:
        i. What specific products (i.e. Yardi, others?) and versions require integration as part of this procurement? **Yardi 7s**
        ii. Is the integration limited to making certain lists of data available to the system for the purposes of providing picklists when tagging content? **We will not need to upload to Yardi. The integration is the ability to navigate from Yardi to the electronic file and produce a document to sign from Yardi and upload to the electronic file**
        iii. What level of integration is anticipated (e.g. hyperlinks only, document-level integration, unidirectional/read only, bidirectional data updates, functional integration)?

87. Regarding requirements for Electronic Forms stated as "Provide ability to create dynamic electronic forms to use as part of a workflow process", can you please provide detailed information and use cases including the information below: **We do not currently have a use cases created**
    a. Is the development of specific forms part of this solicitation or just a required feature of the solution? **Yes**
    b. If forms development is in scope:
        i. How many forms are to be developed and what are they? **Discovery is needed as part of the solution**
        ii. What is the average number of fields per form? **Unknown**
        iii. Can you please provide PDF copies or mockups of all forms to be developed as part of this solicitation?
        iv. If you have experience with SharePoint, do you anticipate that the built-in forms that come with SharePoint Lists will meet your requirements?
88. Regarding requirements related to "Workflow":
    a. Is the development of specific workflows part of this solicitation or just a required feature/capability of the solution? **This is required as part of the solicitation**
    b. If workflow development is in scope:
        i. How many workflows are to be built as part of this solicitation?
        ii. If available, can you please provide an outline of the steps or flow diagrams that represent a typical workflow?
    c. Are the required workflows centered on document approval and records management (e.g. disposition policies) or do they include process workflows to automate line of business functions?
    d. Can we assume that the workflows are very simple in nature (e.g. document approval)?
    e. If you have knowledge and experience with SharePoint and Power Automate (Flow), do you anticipate that the required workflows can be addressed with using SharePoint/O365's built-in workflow capability?
89. Regarding the requirement stated as "Provide desk-side electronic signature capture"; if electronic signatures (e.g. using DocuSign) are in scope: **Some documents produced from Yardi will need signatures**
    a. What is meant by "desk-side" in this context? **Employees require signatures from clients on documents produce from Yardi**
    b. How many users overall do you anticipate need digital signing capabilities? **Approx 75**
    c. How many are internal signers (e.g. approvers)? **All will be clients**
    d. How many signers are external to your organization (e.g. vendor signing a contract)? **Unknown**

e. What is the anticipated usage frequency for a given signer (e.g. a few times per year or daily)? **Yes**

90. We are also reviewing the Authority's RFP #PS-002-20 entitled "Office 365 Migration & Support"; will vendors who provide qualified responses to both RFPs receive additional points in the scoring for both solicitations (i.e. assuming that you see value in having one vendor do both projects)? **We will not award extra points for vendors bidding on both solicitations, they will be evaluated separately.**

Acknowledge receipt by signing below:

This acknowledgement receipt <u>must</u> accompany the bid packet or your bid will be considered unresponsive.

_____
Bidder's Signature

_____
Title

_____
Company Name

_____
Date

If this addendum affects bid pricing for a bid previously submitted, the previously submitted bid will be returned unopened. If this addendum does not affect bid prices for a bid previously submitted, the acknowledgement may be mailed/delivered in a sealed envelope labeled with the proposal number and addenda number and must be received in Purchasing PRIOR to the bid opening.

DO NOT FAX THIS FORM.

This addendum is issued for the information of the above titled project and will be part of the contract.