

# **Bethlehem Housing Authority**

Bethlehem, Pennsylvania

## **Request for Proposal Issued By**

Bethlehem Housing Authority

645 Main Street

4<sup>TH</sup> Floor

Bethlehem, PA 18018

## **Proposal Due By**

Friday December 1, 2023 2:00 PM EST



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### I. ADVERTISEMENT

The Bethlehem Housing Authority (“BHA”) is seeking proposals from qualified technical consultants to provide consulting services of project management, technical advisement, and technical supporting services through the implementation of *Yardi Voyager*. The implementation of the software is anticipated to be ten months from the date of commencement, estimated to begin in the first quarter of 2024. The conversion will be from the current primary BHA legacy platform MRI’s Tenmast Software.

As project manager, the consultant will work with and facilitate the implementation activities with executive leadership in property management, the Housing Choice Voucher Program, finance, information technology, and asset management (known as the “Implementation Team”). The project manager will support and ensure the Implementation Team follows timelines, meets deadlines, and hits important benchmarks throughout the implementation. Additionally, the project manager will facilitate the implementation of each functional area with the goal of maximizing the positive impact of the Yardi software on BHA.

The consultant will provide the Implementation Team with technical advisory and support as requested during the implementation. The technical advisory role will provide functional area team members advice on implementation issues, questions, and best practices. The support role may include assisting the Implementation Team with data cleanup, completing Yardi requests, and other implementation tasks as requested.

By this announcement, BHA is seeking proposals from qualified firms to provide *Yardi Implementation Project Management & Consulting Services*, as described in the Request for Proposals (“RFP”). Proposals are to be received no later than **2:00 p.m. EST on Friday, December 1, 2023**.

Before submitting a proposal, the Respondent shall examine the entire RFP. The submission of a proposal will be construed as evidence that such an examination has been made.

All procurement decisions shall be at the sole discretion of BHA. BHA reserves the right to waive any minor irregularities in any response, cancel the RFP, reject any or all responses or negotiate with any one or more firms when this action is in BHA’s best interest. BHA also reserves the right to reject the response of any firm that has previously failed to perform satisfactorily, or has failed to complete on time, a contract(s) of a similar nature.

BHA is an Affirmative Action Equal Opportunity Employer.

## **II. INTRODUCTION**

### **A. Overview of Work**

The Bethlehem Housing Authority (“BHA”) is seeking proposals from qualified technical consultants to provide consulting services of project management, technical advisement, and technical supporting services through the implementation of *Yardi Voyager*. The implementation of the software is anticipated to be ten months from the date of commencement, estimated to begin in the first quarter of 2024. The conversion will be from the current primary BHA legacy platform MRI’s Tenmast Software.

BHA intends to implement several products with Yardi, the list of these products is listed in Section 2.0 of the RFP.

As project manager, the consultant will work with and facilitate the implementation activities with executive leadership in property management, the Housing Choice Voucher Program, finance, information technology, and asset management (known as the “Implementation Team”). The project manager will support and ensure the Implementation Team follows timelines, meets deadlines, and hits important benchmarks throughout the implementation. Additionally, the project manager will facilitate the implementation of each functional area with the goal of maximizing the positive impact of the Yardi software on BHA.

The consultant will provide the Implementation Team with technical advisory and support as requested during the implementation. The technical advisory role will provide functional area team members advice on implementation issues, questions, and best practices. The support role may include assisting the Implementation Team with data cleanup, completing Yardi requests, and other implementation tasks as requested.

### **B. Organization Background**

Bethlehem Housing Authority of the City of Bethlehem, PA (BHA) was formed in 1939. The area of operation for the Authority is contiguous with that of the Bethlehem city limits and all of Northampton/Lehigh Counties. BHA’s total housing portfolio includes 1,454 public housing units across thirteen properties and 400 Section 8 vouchers.

### **III. Request for Proposals**

#### **Overview Information & Submittal Procedures**

**a. BHA Persons of Contact**

Richard Snyder, Comptroller  
Email: [rsnyder@betha.com](mailto:rsnyder@betha.com)  
Phone: 610-865-8386  
Shawn Horn, IT Manager  
Email: [shorn@betha.com](mailto:shorn@betha.com)  
Phone: 610-865-8325

**b. Obtaining Additional Information:**

All questions should be summarized and emailed to the BHA Persons of Contact. **The last date to submit questions is by 2:00pm EST Friday, November 17, 2023.** All questions will be summarized with responses and shared with all interested bidders.

**c. Full RFP Response requirements:**

As instructed within Section 3.0 of the RFP document. Submissions will be received from bidders via mail only. Elaborate brochures or other presentations beyond those sufficient to present a complete and effective response to this solicitation are not desired.

**d. Proposal Submission Procedure & Deadline**

**Submission By:** Mail Only to the following address:

**Bethlehem Housing Authority**  
**Attn: Shawn Horn**  
**645 Main St, 4<sup>th</sup> Floor**  
**Bethlehem, PA 18018**

**Deadline:** No Later Than **2:00pm EST Friday, December 1, 2023**

**Bid opening** will be on **9:00am EST Monday, December 4, 2023**

**e. Anticipated Award**

The award and selection of the Consultant is expected to occur in **December 2023**

### **1.0 BHA's RESERVATION OF RIGHTS:**

- 1.1** BHA reserves the right to reject any or all proposals, to waive any informality in the RFP process, or to terminate the RFP process at any time, if deemed by BHA to be in its best interests.
- 1.2** BHA reserves the right not to award a contract pursuant to this RFP.
- 1.3** BHA reserves the right to terminate a contract awarded pursuant to this RFP, at any time for its convenience upon 10 days written notice to the successful proposer(s).
- 1.4** BHA reserves the right to determine the days, hours and locations that the successful proposer(s) shall provide the services called for in this RFP.
- 1.5** BHA reserves the right to retain all proposals submitted and not permit withdrawal for a period of 60 days subsequent to the deadline for receiving proposals without the written consent of BHA Contracting Officer (CO).
- 1.6** BHA reserves the right to negotiate the fees proposed by the proposer entity.
- 1.7** BHA reserves the right to reject and not consider any proposal that does not meet the requirements of this RFP, including but not necessarily limited to incomplete proposals and/or proposals offering alternate or non-requested services.
- 1.8** BHA shall have no obligation to compensate any proposer for any costs incurred in responding to this RFP.
- 1.9** BHA shall reserve the right to at any time during the RFP or contract process to prohibit any further participation by a proposer or reject any proposal submitted that does not conform to any of the requirements detailed herein.

### 2.0 SCOPE OF WORK (SOW)

The successful candidate will provide Project Management & Consulting Services for the Yardi Implementation as listed in section Project Manager (2.1), Technical Advisor (2.2), and Technical Support (2.3). BHA expects to begin the conversion in the first quarter of 2024 with an estimated ten-month implementation.

BHA will be implementing the following Yardi products:

- Voyager PHA
- Rent Café PHA
- Inspection IQ
- Maintenance IQ
- PHA Budgeting & Forecasting
- Procure to Pay
- Invoice full-service processing and payment
- Resident payments.

### 2.1 Project Manager

The consultant will be the overall project manager for the Yardi implementation working directly with the Implementation Team consisting of executive leadership in property management, the Housing Choice Voucher Program (HCVP), finance, information technology, and asset management.

The services to be performed as the Project Manger are as follows:

- 2.1.1 Facilitate and lead** the Implementation Team through the entire Yardi planning and implementation of the identified modules.
- 2.1.2 Identify and establish roles and responsibilities** of the Implementation Team members and Consultant.
- 2.1.3 Create an implementation timeline** with granular and high-level benchmarks to be used by the Implementation Team. This will incorporate Yardi provided timelines and internal BHA timelines.
- 2.1.4 Evaluate and document internal BHA staffing requirements** for the implementation to identify realistic BHA staff time requirements.
- 2.1.5 Identify and create a strategic “buy-in plan”** to entice and inform BHA Staff on forthcoming system changes and the benefits to BHA.
- 2.1.6 Review** tentative Yardi contract, scope of work, selected products, and other related documents to ensure favorable, cohesive, coherent, and inclusive documentation.
- 2.1.7 Facilitate weekly meetings** on the status of the Yardi project with the Implementation Team.

- 2.1.8 **Yardi central point of contact** on implementation, tasked with scheduling meetings with Yardi, communicating any issues, and other BHA directed correspondence.
- 2.1.9 **Liaison between BHA and Legacy Vendors** in getting required data and information to assist with the implementation of Yardi.
- 2.1.10 **Ensure cohesive implementation** between products and functional areas to avoid software structural issues.
- 2.1.11 **Troubleshoot** problems that may occur during implementation and identify an appropriate corrective action plan with suitable Implementation Team members.
- 2.1.12 Ensure the Implementation Team maintains momentum meeting all **timelines, hitting all deadlines and important benchmarks**.
- 2.1.13 **Report to BHA Board of Commissioners** via remote presentation or through brief written report on Yardi project updates quarterly throughout the implementation term.
- 2.1.14 Establish a **training schedule** for all functional staff members to use the Yardi product as intended.
- 2.1.15 Ensure BHA successfully implements and hits a **Go Live within 10 months** of commencement of the project.

## 2.2 Technical Advisor

Through the implementation of the Yardi product, BHA may require the consultant to provide technical advice to make the best choice in product structure and solutions. This includes, but may not be limited to, the following items:

- 2.2.1 **Provide advice** on how and what data to clean up on originating legacy systems, to prepare for the Yardi data conversion process. This will include the data housed in MRI's Tenmast Software and other software packages utilized by BHA. The data to be reviewed include the following functional areas:
  - Tenant Data
  - Property Information
  - Landlord Information (HCVP)
  - Finance – General Ledger, Banking, Invoicing (to ensure consistence with new product)
- 2.2.2 **Provided as needed advice** on the setup, implementation, and configuration of any of the Yardi modules. This request will be discussed and assigned in collaboration with the entire Implementation Team.



- 2.2.3 **Review Yardi workflow** setups in different functional areas to maximize effect and efficiency promoting a dual control environment where appropriate and feasible.
- 2.2.4 Assist as needed in creating, updating, or revising **step-by-step workflow** of identified tasks not described in the Yardi system.
- 2.2.5 Identify, update, and create BHA **written procedures and policies** on the different functional areas as needed.
- 2.2.6 **Reviewing and/or creating appropriate internal controls** on the setup of users, security roles and access to sensitive materials.
- 2.2.7 Provide as needed **training** on software modules not provided by Yardi.
- 2.2.8 Assist in creating and identification of **key reports** for staff in different functional areas.
- 2.2.9 Assist in the setup and creation of **Yardi system dashboards** for different staffing groups including executive, finance, property management, HCVP, and asset management.

### 2.3 Support

The consultant may be required to provide additional support services for BHA to assist in completing implementation activities.

- 2.3.1 Provided as needed assistance with **data clean up** on originating legacy systems to prepare for the Yardi data conversion process. This will include the data housed in MRI's Tenmast Software and other software packages utilized by BHA. The data sets that may require assistance are in the following functional areas:
  - Tenant Data
  - Property Information
  - Landlord Information (HCVP)
- 2.3.2 Provided as needed assistance in the completion of **Yardi request templates and forms**.

### 3.0 PROPOSAL FORMAT

#### 3.1 Tabbed Proposal Submittal

BHA intends to retain the successful proposer pursuant to a “Best Value” basis, not a “Low Proposal” basis (“Best Value,” in that BHA will, as detailed within the following Section 4.0, consider factors other than just cost in making the award decision).

All proposals submitted in response to this RFP must be formatted in accordance with the sequence noted in this section items 1-5. A table of contents should be included identifying each section with the associated page numbers. Additionally, each section must be separated by numbered index dividers and labeled with the corresponding tab reference also noted below. None of the proposed services may conflict with any requirement BHA has published herein or issued by addendum.

Should a bidder be selected, there will be additional information requested prior to the contract award. Please review the evaluation criteria in Section 4.1 to ensure the provided information is sufficient to allow for BHA in its final grading.

#### 1 Executive Summary

Provide a summarized overview of RFP submission and identify key strengths that would make firm an ideal candidate for BHA.

#### 2 Firm Overview

Provide an overview of the firm, the firm’s experience, team, and human/financial capacity to complete SOW.

- a. Provide an overview of the Firm.
- b. Identify Key Staff/Team to be assigned to work. Provide a summary of each team member’s work experience, background, and team role. A resume can be used to satisfy work experience.
- c. Describe and identify the firm’s experience with the SOW including:
  - i. Number of implementations completed.
  - ii. Number of implementations completed in last five years broken down by year,
  - iii. Size range (units/vouchers) of organization implementations,
  - iv. Type of organizations (Housing Authority, Affordable Housing Non-Profit/For-Profit, etc.),
  - v. Scope of implementations, and
  - vi. Systems converted from and to.
- d. Organizational Chart of Firm Staff.
- e. The proposer shall identify if it intends to use any subcontractors for this job, if awarded, and/or if the proposal is a joint venture with another firm. Please remember that all information required from the proposer under the proceeding tabs must also be included for any major subcontractors (10% or more) or from any joint venture.

### 3 Proposal and Description Services

Detailed and comprehensive SOW proposal in alignment with the items listed in Section 2.0 with assigned team members, estimated number of hours required to complete work, approach to each service (as required, they can be consolidated) and overall philosophy.

### 4 Experience References

The proposer shall submit a listing of former or current clients, including Public Housing Authorities, for whom the proposer performed similar or like services to those being proposed herein. The listing shall, at a minimum, include:

- a. Clients Name
- b. Primary Contact Name, Email and Phone Number
- c. A brief description and scope of the service(s) and the dates the services were provided.

### 5 Cost Proposal

Provide a cost proposal, hourly rate, and estimated number of hours for the work identified in the SOW. The cost proposal should be provided in detail in accordance with the SOW listed. All hourly rates should be inclusive of the firm's direct costs and overhead expenses.

Any reimbursable expenses (travel, lodging, etc.) should be identified in this RFP and would be reimbursed at cost. *Exhibit A* is an example of the cost proposal formatting, this is meant as a guide. The bidder may use any format they feel is appropriate and achieves the requirements listed.

- 3.2 Proposal Submission:** All proposals must be received no later than the submittal deadline stated in Section III - Overview Information & Submittal Procedures (or within any ensuing addendum). The proposal should be submitted via mail only to the address stated in Section III Part d - Proposal Submission Procedure & Deadline with a table of contents and all applicable information provided. Proposals received after the published deadline will not be accepted.

#### 4.0 PROPOSAL EVALUATION:

- 4.1 Evaluation Factors:** The following factors will be utilized by BHA to evaluate each proposal submittal received; award of points for each listed factor will be based upon the documentation that the proposer submits within his/her proposal submittal:

**[Table No. 1]**

MAX POINT VALUE		PERFORMANCE FACTOR
1	40	Demonstrated experience in previous Tenmast to Yardi conversions and successful past performances
2	25	Firm & key staff qualifications and experience
3	20	Firm presents a cohesive plan that will meet project deadlines and benchmarks
4	15	Cost proposal
<b>100 points</b>		<b>Total Maximum Points</b>

- 4.2 Evaluation & Selection:** A selection committee will be created at BHA to evaluate the RFP based on the evaluation factors listed in [Table No. 1]. The final average score will determine the selected firm. When an award is completed or cancelled, all proposers will receive by e-mail a Notice of Results of Evaluation. Such notice shall inform all proposers of:
- Which proposer received the award;
  - Where each proposer placed in the process as a result of the evaluation of the proposals received;
  - Each proposer's right to a debriefing and to protest.

### 5.0 CONTRACT AWARD:

- 5.1 BHA reserves the right to waive any minor irregularities in any response when this action is in its best interest, cancel the RFP, reject any or all responses or negotiate with any one or more firms. BHA also reserves the right to reject the response of any firm that has previously failed to perform satisfactorily, or has failed to complete on time, a contract or contracts of a similar nature.
- 5.2 BHA reserves the right to negotiate with any Respondent. BHA also reserves the right to negotiate with the firm to amend and extend the contract issued under this solicitation.
- 5.3 All procurement decisions shall be at the sole discretion of BHA.
- 5.4 This procurement procedure and contract award are subject to regulations of the U. S. Department of Housing and Urban Development and any applicable federal and state laws and regulations.
- 5.5 The selected consulting firm and BHA will enter into an Agreement as provided attached hereto in *Exhibit B*, or as amended.

***Exhibit A  
Cost Proposal Template***

2.1	Project Management	Hourly Rate	Hours	Total Cost	# of Staff	Notes
2.1.1				\$ -		
2.1.2				\$ -		
2.1.3				\$ -		
2.1.4				\$ -		
2.1.5				\$ -		
2.1.6				\$ -		
2.1.7				\$ -		
2.1.8				\$ -		
	<b>Total Project Management Cost</b>		-	\$ -		

2.2	Technical Advisor	Hourly Rate	Hours	Total Cost	# of Staff	Notes
2.2.1				\$ -		
2.2.2				\$ -		
2.2.3				\$ -		
2.2.4				\$ -		
2.2.5				\$ -		
2.2.6				\$ -		
2.2.7				\$ -		
2.2.8				\$ -		
	<b>Total Technical Advisor Cost</b>		-	\$ -		

2.3	Support	Hourly Rate	Hours	Total Cost	# of Staff	Notes
2.3.1				\$ -		
2.3.2				\$ -		
2.3.3				\$ -		
2.3.4				\$ -		
2.3.5				\$ -		
2.3.6				\$ -		
2.3.7				\$ -		
2.3.8				\$ -		
	<b>Total Support Cost</b>		-	\$ -		

	<b>Total Overall Cost</b>		-	\$ -		
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*Exhibit B*  
*Services Contract Example*

*Provided Upon Request*