

# REQUEST FOR PROPOSALS

**DATABASE AND SOFTWARE DEVELOPERS TO  
ASSIST IN IMPLEMENTING A MULTIFAMILY  
HOUSING SOFTWARE SUITE**

**REQUIRED BY**

**MISSOURI HOUSING DEVELOPMENT COMMISSION**



*Strength, Dignity, Quality of Life*

**MISSOURI HOUSING**

**DEVELOPMENT COMMISSION**

**RESPONSES DUE:**

**Friday, July 30, 2010, by 5:00 P.M. Central Standard Time**

## **SECTION I: INTRODUCTORY INFORMATION**

**Missouri Housing  
Development  
Commission:**

In 1969, the 75th General Assembly of Missouri, in the face of a general housing shortage severely affecting low- and moderate-income persons, established the Missouri Housing Development Commission (“MHDC” or the “Commission”) in order to increase the availability of decent, safe and sanitary housing at prices within the means of low- and moderate-income persons. The Commission is a governmental instrumentality of the state of Missouri and a body corporate and politic. The Commission’s authority is derived from Chapter 215 of the Revised Statutes of Missouri, as amended and supplemented.

**What We Do:**

MHDC’s Multifamily division is comprised of the Rental Production and Asset Management departments.

MHDC’s Rental Production Multifamily Programs encompass financing tools for the development of affordable housing which include federal and state low-income housing tax credits (“LIHTC”), HOME loan and grant funds, Fund Balance loans, and Risk Share insurance coupled with tax exempt bonds. Developers may also utilize other MHDC programs such as the Affordable Housing Tax Credit and Missouri Housing Trust Fund as appropriate for the financing of a development. The project is tracked and monitored from application approval through the construction phase.

MHDC’s Asset Management group oversees a portfolio of more than 2,000 affordable housing project investments throughout the state of Missouri, to ensure project compliance with state and federal regulations. This group provides expertise and oversight, monitoring housing program compliance from lease-up through ongoing annual operations. The group also oversees Section 8 contract administration.

**Purpose of RFP:**

The purpose of this Request for Proposals (“RFP”) is to request proposals from database and software developers to assist in implementing and customizing a multifamily housing software suite. Interested parties should respond in accordance with this RFP.

**SCOPES Initiative:**

MHDC is underway on a multi-year initiative to improve business processes, and subsequent areas for improvement in its technology applications and human processes. The overall objective of this initiative has been nicknamed “SCOPES.” RSM McGladrey, Inc. is working as program manager for the overarching SCOPES initiative, which includes but is not limited to coordinating with the database and software developers to assist in implementing and customizing a multifamily housing software suite.

**Proposal Due Date:**

Issuance of RFP – Monday, July 1, 2010  
Deadline for submission of vendor questions – July 22, 2010  
MHDC responses to vendor questions– July 26, 2010

RFP response deadline – Friday, July 30, 2010, by 5:00 P.M. Central Standard Time

**Submission of Proposal:**

*Five (5) printed copies and one electronic copy of the proposal must be submitted by the proposal due date noted above to:*

*James Block, Production Data Manager – Project Lead  
Missouri Housing Development Commission  
3435 Broadway  
Kansas City, Missouri 64111*

*Proposals must be submitted in printed bound form, along with one electronic copy on a CD-ROM, in a sealed envelope marked “Proposal for database and software developers to assist in implementing and customizing a multifamily housing software suite” and shall include all information required pursuant to this RFP. The envelope shall be marked with the name of the firm submitting the Proposal.*

*(Neither faxed copies nor electronic submissions will be accepted.)*

**SECTION II: PROCEDURES AND INSTRUCTIONS**

**Questions:**

Questions regarding this RFP should be directed to the Commission in writing by mail, facsimile or electronic mail, as follows:

James Block  
Production Data Manager - Project Lead  
Missouri Housing Development Commission  
3435 Broadway  
Kansas City, Missouri 64111  
(816) 759-6829 (fax)  
[jblock@mhdc.com](mailto:jblock@mhdc.com)

MHDC will attempt to answer all questions within two business days.

**Standards of Conduct:**

Please refer to the Commission’s “Standards of Conduct” Policy for information regarding contact with MHDC commissioners or staff in connection with this RFP. The Commission’s Standards of Conduct Policy is available on MHDC’s website at [www.mhdc.com](http://www.mhdc.com).

**Modifications to Proposals:**

Respondents may not modify or correct its Proposal any time after the Proposal Due Date except in direct response to a request from the Commission for clarification.

**Revisions to this RFP:**

In the event that it becomes necessary to revise or clarify any part of the RFP, MHDC will provide an addendum on MHDC’s website at [www.mhdc.com](http://www.mhdc.com).

**Expense of Preparation of**

MHDC is not responsible for any expense incurred in preparing and submitting a Proposal or taking any action in connection with the

- Proposals:** selection process, or for the costs of any services performed in connection with submission of a Proposal.
- Reservation of Rights:** MHDC reserves the right to conduct any investigation of the qualifications of any firm that it deems appropriate; negotiate modifications to any of the items proposed in the Proposal; request additional information from any respondent; reject any or all Proposals; and waive any irregularities in any Proposal. **MHDC retains the right to negotiate the fees and compensation arrangements for this project.**
- Public Records:** Respondents to this RFP should be aware that responses received become public records under state law once the evaluation process has been completed.
- Visits and Interviews:** Respondents to this RFP may be asked to schedule a visit to MHDC offices or to another location upon request by the Commission. In addition, firms responding to this RFP may be interviewed as a part of the selection process.

### **SECTION III: OVERVIEW**

- Description:** The Missouri Housing Development Commission (“MHDC”) is requesting proposals/bids from database and software developers to assist in implementing a multifamily housing software suite. The contractor will also provide customization and support for the software and database. Built with a Microsoft ASP.NET™ application environment and a Microsoft SQL Server® database, the software will act as the primary functional system and centralized database for MHDC’s multifamily operations.
- Objective/Goal:** MHDC is in the process of purchasing a multifamily housing software suite (“Authority DMS”) from Indiana Housing & Community Development Authority (“IHCDA”) and seeks to implement it and customize it further to meet defined requirements. Built with a Microsoft ASP.NET™ application environment and a Microsoft SQL Server® database, the integrated software solution already enables the performance of several key business functions, but requires further customization to meet a core set of MHDC requirements. The end-goal is to achieve a higher degree of systems integration and to facilitate management of multifamily applications from reservation stages through ongoing compliance. The unique production needs of several funding programs are met with this new suite.

### **SECTION IV: SCOPE OF SERVICES**

We are seeking a provider with a demonstrated and proven track record with similar deployments/implementations and customization of systems at similar organizations. MHDC reserves the right to consider the following, among other things for the contractor firm:

qualifications and relevant experience of the contractor firm, individuals assigned to the project, capacity to perform the project in a timely manner, service/support capabilities, and cost (hourly rates charged by the contractor firm).

Detailed requirements will be provided to the services provider with the winning bid. The primary tasks of the engagement will be as follows but may not be limited to:

- Installing and configuring as appropriate for implementation, the DMS software suite and database
- Providing further customization services for selected areas/modules that may include but are not limited to:
  - LIHTC allocations and management
  - Moving data from funding decision through the compliance lifecycle
  - Construction draw submission and disbursement
  - Ongoing program compliance
  - Automated testing of online annual owner/tenant compliance certifications
  - Portfolio data analysis and report generation: including standard and customized ad-hoc reporting for each of the areas described above
- Providing training and related documentation for users of the new system

Respondents should briefly describe their relevant experience and provide relevant descriptions for the following:

- Successful Housing Finance Agency and related industry projects
- Using Microsoft ASP.NET™ and SQL Server® for Applications in a Windows environment (servers and workstations)
- Database integration with other software such as Microsoft Dynamics® CRM and/or Microsoft SharePoint®
- Web design for development of intranet and/or extranet functionality
- Reporting analytics development
- Development and coordination with staff, including:
  - Creation of user-friendly forms for data entry and transparent, easily understandable structures within database
  - Code annotation for long term viability of application
  - Code development methodology to be used for the project
  - Where development work will be performed
  - Method of application deployment, installation
  - User training strategy and tactical plans
- How determination is made that the products are fully and successfully implemented and that the agreement for implementation support has been entirely fulfilled
- The vendor should identify all key personnel that will be utilized for the project and provide brief biographies of them.

**Ownership:**

The respondent must acknowledge and agree that MHDC will own applicable source and object code and any other information of any kind and in any form which is required to make updates or modifications to the acquired software suite. MHDC will also own any related documentation.

**SECTION V: STRUCTURE OF PROPOSAL**

- A. The Commission desires to consider Proposals in a consistent and easily comparable format as established in this RFP. Proposals not organized as set forth in this RFP may, at MHDC’s discretion, be considered unresponsive. Do not refer to other parts of your proposal in lieu of answering a specific question.
- B. Each response shall include a transmittal letter signed by an authorized representative of the firm. In the transmittal letter the respondent shall certify (i) that no elected or appointed official or employee of the Commission is financially interested, directly or indirectly, in the performance of the services specified in the RFP, (ii) that the information included in the response is true and correct to the best of its knowledge and (iii) that the person signing the transmittal letter is authorized to execute the response on behalf of the respondent.
- C. Proposals should be organized in the same manner as the individual information request contained in **Section VII: Proposal Details**. Responses to each lettered question shall begin on a separate page (e.g., answers to Question 2 should begin on a separate page from the response to Question 1).
- D. Exhibits containing additional information may be attached to provide more detail to respondent’s offerings or services.

**SECTION VI: EVALUATION CRITERIA**

The evaluation of Proposals will take place at the MHDC office. The Evaluation Committee will evaluate the Proposals in part by considering the following factors:

**A. Capabilities of contractor firm:**

- As requested in **Section IV: Scope of Services**.

**B. Demonstrated successful implementation with state Housing Finance Agencies (“HFA”) such as MHDC and/or other local, state, or federal government agencies:**

- Breadth and depth of knowledge of HFA business processes, systems integration, and other requirements to be determined by MHDC
- Federal, state, grant and Low Income Housing Tax Credit resources
- Experience working with the DMS software or other HFA specific and custom software

### C. Cost

The lowest-priced bid will not be the sole criterion used to determine who is selected. Notwithstanding the above, MHDC reserves the right not to award this contract or to award on the basis of cost alone, to accept or reject any or all proposals, to award the contract as separate solutions, and to award in its best interest.

## **SECTION VII: PROPOSAL DETAILS**

Respondents to this RFP should prepare clear and complete responses to each of the following questions and information requests. Brevity and clarity of responses will be appreciated.

- A. Personnel and Location. Provide the name, telephone number, fax number and email address of the respondent. Identify a primary contact person regarding the response and the proposed project manager for the engagement.
- B. Entity Overview. Provide an overview of the Respondent's entity(s), including the full legal name of the institution(s) and the state(s) of organization. Is the firm(s) a minority- or woman-owned business? Describe entity's inclusion of minority and women participation, including the entity's employees and/or any participation with a minority- or woman-owned entity.
- C. Scope of Service. Describe the services proposed to fulfill the requirements **in Section IV: Scope of Services**. The responses should be as detailed as possible based on the information provided.
- D. Proposed Fees. MHDC is looking for the respondent to provide hourly rates by personnel level assigned to the project.
- E. Undocumented Workers. Pursuant to *Mo.Rev.Stat. §285.530.2*, all respondents to this RFP shall provide MHDC with an affidavit stating that the respondent does not employ any person who is an unauthorized alien in conjunction with the contracted services, and that the respondent is enrolled in and participating in a federal work authorization program with respect to the employees working in connection with the contracted services. This affidavit shall be updated and executed again at the time the engagement of the

selected respondent is memorialized in a contract. Furthermore, prior to execution of any contract contemplated herein, the respondent shall provide evidence of participation in a federal work authorization program. Questions regarding this requirement may be directed to the Commission's Legal Department by phone at 816-759-6870. Additional information regarding this requirement, including a sample affidavit, is available on the MHDC webpage at <http://www.mhdc.com/notices/rfdcuw/default.htm>.

## **SECTION VIII: OVERVIEW OF AUTHORITYDMS**

### **Functional**

*Resources utilized to fund the acquisition, development, construction, and rehabilitation of affordable housing.*

AuthorityDMS is designed to track information about organizations and their awards. It has the ability to manage all of the relationships between multiple organizations, multiple contacts, and multiple awards which provides a holistic view of all of these relationships.

In addition to tracking this entity data, AuthorityDMS tracks a significant amount of detail that is associated with the housing development. This includes information from the application process through the award and compliance period.

*Data from funding award through the compliance lifecycle; this includes but is not limited to: award, construction, and compliance.*

AuthorityDMS tracks a significant amount of detail that is associated with the housing development. This includes information from the application process through the award and compliance period.

Information is collected from applicant organizations that are related to the application and maintained for the lifetime of the award. Compliance information related to monitoring and Annual Owner Certifications are collected and maintained for the lifetime of the award.

*Construction disbursement capabilities and tracking.*

AuthorityDMS has the ability to manage the funds that are awarded through grants to organizations. It will allow for the tracking of budget information and history. It includes features to allow grantees to submit funding requests online as well as a managed approval process for staff to review and approve these requests.

In addition to grants, AuthorityDMS also includes the ability to manage and track funds that are awarded through contracts to



vendors. All of this information can reconcile back to funding sources for reporting.

*Ongoing program compliance.*

AuthorityDMS includes both a Tax Credit Owner Certification module and a Monitoring Compliance module.

The Owner Certification module provides the ability for property managers to enter their tenant events online and obtain basic error checking. There is an automated rules compliance engine that will process an Annual Owner Certification for compliance issues and generate a list of any issues identified.

The Monitoring Compliance module allows for custom monitoring questions to be created and then used when doing desktop or onsite monitoring.

*Automated testing of online annual owner / tenant compliance certifications.*

The Owner Certification module provides the ability for property managers to enter their tenant events online and obtain basic error checking. There is an automated rules compliance engine that will process an Annual Owner Certification for compliance issues and generate a list of any issues identified.

*Portfolio data analysis and report generation, including standard and customized ad-hoc reporting for each of the areas described above.*

AuthorityDMS is designed to track information about organizations and their awards. It has the ability to manage all of the relationships between multiple organizations, multiple contacts, and multiple awards which provides a holistic view of all of these relationships and all of the information as it pertains to the award.

AuthorityDMS has a set of pre-packaged reports that are used to manage this data. In addition, the database will allow for custom reports to be built using standard reporting tools that are widely available. AuthorityDMS makes use of both Microsoft SQL Server Reporting Services as well as Crystal Reports. Both of these tools can be used to generate ad-hoc or custom reports on any information in the system.

**Technical**

The AuthorityDMS incorporates the following technologies:

- Microsoft SQL Server: Relational database engine for all data storage and security. AuthorityDMS requires SQL Server 2005 or higher.

- Microsoft Visual Studio 2010: Development environment for the smart client and web interfaces. Microsoft .Net 3.5: Foundation of the development platform.
- SQL Server Reporting Services: Reporting tools for on-demand and subscription based reports.
- Microsoft IIS: Web server for web site hosting.
- Microsoft CRM: Customer Relationship Management system for correspondence management.
- Microsoft SharePoint Server 2007: Collaboration, dashboards, and document storage.
- Microsoft Office: Document editing and correspondence. AuthorityDMS requires Office 2007 or higher.
- Microsoft Dynamics GP: Integration for Accounting.