



REQUEST FOR PROPOSALS

YARDI INDEPENDENT CONSULTING SERVICES

Issued by:

Boise City / Ada County Housing Authorities

Issue Date:

March 4, 2025

Proposals Due By:

5:00 pm MST Tuesday, March 18, 2025

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REQUEST FOR PROPOSALS (RFP)

YARDI Independent Consulting Services

OWNER: Boise City/Ada County Housing Authority

PROJECT: YARDI Independent Consulting Services

I. INTRODUCTION

The Boise City/Ada County Housing Authority (BCACHA) is seeking proposals from qualified independent consultants or firms to provide YARDI consulting services. BCACHA has been undergoing a major software conversion to YARDI over the past year and has determined the need for additional expertise to optimize system utilization. Due to limited internal staff availability and programming capabilities, BCACHA requires external assistance on an as-needed basis.

II. BACKGROUND

Boise City & Ada County Housing Authorities (BCACHA) implemented Yardi 7S in March 2024 and received software support services through Yardi. BCACHA currently has licenses for the Public Housing (PHA), Affordable, Financials, PayScan, Advanced Budgeting, Client Central, Fixed Assets, and Yardi-SharePoint modules. Additional Yardi products outside of Voyager 7S being used at BCACHA are Rent Café, (Applicant, Resident, & Landlord Portal) and Elevate (Case Manager and Maintenance/Inspections IQ). On occasion, additional support and consulting services are needed to either supplement or substitute for Yardi support services.

BCACHA serves as the primary housing authority for Boise, Meridian, Kuna, Garden City, Eagle, Star, and unincorporated Ada County, providing and managing affordable housing options for a diverse range of residents. BCACHA owns, manages, and maintains 441 housing units, including 250 public housing units, with 160 designated for elderly and disabled residents, 10 scattered-site units for low-income families, and 4 Permanent Supportive Housing (PSH) units designed to assist households transitioning out of homelessness with supportive services. The agency also operates 80 units under the Section 8 New Construction Program, ensuring secure and affordable housing for elderly and disabled residents. Additionally, 187 market-rate units help expand housing options for moderate-income households and the broader community. Through these programs, BCACHA works to meet the growing demand for affordable housing and promote housing stability throughout Ada County.

The objective of this Request for Proposals (RFP) is to solicit proposals from qualified consulting firms to provide Yardi Voyager 7S software application, system administration, technical support, customizations, training and consulting on an as-needed basis for

BCACHA. The selected consulting firm (Consultant) will serve as BCACHA's Yardi software support team to address various software needs as they arise.

III. INSTRUCTIONS TO PROPOSERS

I. RFP GENERAL INSTRUCTIONS

- A. Interested parties may obtain **RFP YARDI Independent Consulting Services** Request for Proposal package from www.bcacha.org
- B. Submit proposals to Boise City/Ada County Housing Authority in accordance with the instructions found at Exhibit C no later than 5:00 p.m. local time, on March 18, 2025.

II. PROPOSAL SUBMISSION

- A. Please see Proposal Submission Instructions, Exhibit C, for instructions regarding the electronic submission of proposals.
- B. Proposal Submission should include a Proposed Agreement between the Consultant and BCACHA
- C. Submit information that represents proposer will meet BCACHA expectations as provided by Exhibit A "Scope of Work" attached herein.
- D. Submit sealed proposals online to Boise City/Ada County Housing Authority no later than **5:00 p.m. local time, on March 18, 2025. Proposals received after the due date and time will be deemed non-responsive and will not be considered.**

IV. PROPOSAL CONTENT & EVALUATION CRITERIA

Proposals to this RFP must be organized as outlined below. Proposals not organized as outlined below, not containing the information specified, or not containing sufficient detail, will receive a lower rating when evaluated. The proposal must address the following areas at a minimum:

I. PROPOSAL CONTENT

- A. Proposal Response Cover Sheet. This is to be the first document of the proposal. It must include the legal name of the proposer, the name of a contact person and title, and contact information. It must be signed by a person authorized to submit a proposal in response to this RFP.

- B. Letter of Introduction. Please provide a letter of introduction as the second document of the proposal. Briefly introduce your company, provide the location of the office that will be primarily responsible for the work, and identify the contact person in your organization for correspondence with BCACHA. Also include email and telephone numbers for the contact person. Provide the name of the person legally authorized to sign an agreement for your company.
- C. Company History. Provide a brief history of your company. Include the number of offices, location, total number of employees, and type of services that your company performs. Also provide the number of employees that work in the office that will service this contract, broken down into technical, clerical and other. If applicable, please provide information regarding any arbitration and/or litigation in which your firm is currently involved, as well as the dates and resolution of any reorganization or bankruptcy for which you or your company have filed within the past five (5) years.
- D. Unique Qualifications. Please present information concerning your company's unique qualifications for performing the services required in this RFP.
- E. Experience with Comparable Projects. Please provide a summary of your company's experience in providing the services required in this RFP, in which your company was the prime consultant, within last three (3) years. Detail the locations, types of services performed, and examples or provide links to web-based products (limit the number of examples to between three and five projects). In particular, highlight previous experience with other housing authorities.
- F. References. Please provide at a minimum three (3) client references (including names, titles, telephone numbers and e-mail addresses) for similar services, as required in this RFP, that your company has provided in the last five (5) years. By providing such references you agree that neither BCACHA, nor the clients referenced, shall have any liability regarding the provision of such references or the BCACHA's use of such references in making selections under this RFP.
- G. Key Personnel. Provide a list of key personnel who have specialized experience and expertise relating to the services required in this RFP. List only those that are likely to actually perform the work described in this RFP. Provide curriculum vitae for each that details their education, experience, and special expertise. Also include the company name and key team members of any subcontractors you anticipate using for this Project.
- H. Proposed Approach to Project. Please explain your company's overall approach to performing the services identified in the Scope of Work attached as Exhibit A and the coordination of activities necessary to provide the products/services as required in this RFP.

- I. Additional Information. Please provide any other information you believe is applicable to the evaluation of the proposal or your qualifications for providing the proposed services, including any aspects of your services that may distinguish your firm from others.
- J. Affirm that your company is willing to enter into an agreement with BCACHA.
- K. If your company is unable to provide details on any specific item, please state the reason.

II. PROPOSAL EVALUATION CRITERIA AND PROCESS

- A. An evaluation committee (Committee) will review all written proposals. The review process may involve requesting clarification of portions of the proposal and/or a request for additional business financial records. From that review process, the Committee will rank the proposals in an order representing the Committee's evaluation of the proposer's ability to provide the services required in this RFP, using the established Evaluation Criteria listed below.
- B. BCACHA reserves the right to accept or reject any or all proposals.
- C. Evaluation Criteria. The following criteria will be used to evaluate and rank all proposals. Evaluation scoring will be based on a 100-point system as described below.
 - 1. Compliance with the RFP Proposal Requirements. Ten (10) points possible.
 - 2. Approach to the Project. Thirty (30) points possible. The proposer's proposed approach to meeting BCACHA's specific needs and requirements, as well as the ability to meet timeframes for responding to service requests, delivering customizations, and completing projects within a reasonable period.
 - 3. Experience in providing the services required, particularly with public agencies. Twenty (20) points possible. The proposer's demonstrated experience in performing similar work and the proposer's demonstrated successful past performance of contract work substantially similar to that required by this solicitation as verified by reference checks or other means. NOTE: The Agency will place particular emphasis on the proposer's above-described experience and past performance with public housing authorities and services of this type.

4. References and the quality of service provided for similar services Ten (10) points possible. The proposer's previous customer satisfaction, including references from prior clients, experience with BCACHA (if applicable), testimonials, and any case studies demonstrating successful projects.
5. Anticipated Costs for the project. Thirty (30) points possible.

Evaluation Criteria		Rating Weight Score		
1	Compliance with RFP Requirements 10%		2	
2	Approach to Project 30%		6	
3	Experience 20%		4	
4	References 10%		2	
5	Cost 30%		6	

(Rating x Weight) = Score (100 total points maximum)

Rating Points:

- 5.0 – Excellent
- 4.0 – Good
- 3.0 – Meets Minimum Expectations
- 2.0 – Unsatisfactory
- 1.0 – Poor
- 0.0 – No Information Provided

D. Presentation and Interview. (Optional and worth 50 points.) If deemed helpful, the Committee may request Proposers to give a presentation of their proposal and answer questions. The Committee is not required to hold presentations or interviews, but may request presentations and/or interviews of the top ranked proposers from the initial evaluation. Proposers will be ranked on the quality of the presentation and/or interview up to a maximum of 50 additional points. Any points awarded during the presentation and interview phase will be added to the proposer’s existing cumulative points as per the other evaluation criteria described above, increasing the maximum total points to 150.

Approximate Selection & Contracting Process

BCACHA is dedicated to swiftly selecting a vendor and finalizing a contract. The selection process will be expedited, with a decision expected within approximately two weeks of the proposal submission deadline. Once a consultant is chosen, BCACHA will prioritize contract execution to facilitate the prompt start of services.

EXHIBIT A- SCOPE OF WORK

The selected consultant or firm will provide YARDI-related services, including but not limited to:

1. System Optimization & Configuration

- Evaluate current YARDI setup and recommend best practices for configuration and workflow improvement.
- Customize modules and features to enhance functionality.
- Ensure integration with other systems and data sources.

2. Reporting & Data Management

- Develop and refine reports to meet operational and compliance needs.
- Assist with data migration, cleanup, and validation.
- Provide guidance on data analytics and business intelligence tools within YARDI.

3. Staff Training & User Support

- Develop step-by-step procedural documents and conduct training sessions for staff on various YARDI modules.
- Provide user documentation and knowledge transfer.
- Offer ongoing troubleshooting and technical support.

4. Enhancements & Custom Development

- Assist with system upgrades and new feature implementations.
- Develop custom scripts, workflows, or integrations as needed.
- Provide recommendations for third-party add-ons or enhancements.
- Creating custom letters that automatically attach to tenant records.
- Modifying existing features to better align with BCACHA's business processes.

5. Compliance & Security

- Ensure compliance with HUD regulations and other applicable guidelines.
- Review security settings and user access controls.
- Recommend best practices for data protection and system security.

Comprehensive Yardi Voyager Expertise. The Consultant firm must demonstrate extensive knowledge and experience in supporting Yardi Voyager for public housing and affordable properties. This includes proficiency in managing various modules. Preference will be given to firms that demonstrate an in-depth knowledge of the accounting functions within Yardi. The Consultant should have a proven track record of successfully delivering Yardi Voyager support services to public housing authorities.

Prompt Response Time. The Consultant must commit to providing prompt and efficient support by responding to services requests within 24 hours, Monday through Friday, from 8 am to 4 pm Mountain Time. The selected firm should have a dedicated team of professionals ready to address and resolve issues in a timely manner, ensuring minimal disruption to BCACHA's operations.

Staff Capacity and Flexibility. The Consultant must have the staff capacity to handle small project requests, develop specialized reports, and implement customizations on an "as needed" basis within a reasonable period of time. The Consultant should have a diverse team of skilled professionals, including system administrators, and functional experts, who can efficiently address BCACHA's unique needs and requirements.

Tailored Solutions and Customizations. The Consultant should have the ability to provide tailored solutions that align with BCACHA's specific business processes and requirements. This includes developing and streamlining workflows within the Yardi Voyager 7S software. The Consultant should have a deep understanding of the public housing and affordable properties sector, enabling them to design solutions that effectively address BCACHA's unique challenges.

Ongoing Training and Support. The Consultant must demonstrate a commitment to providing ongoing training and support to BCACHA staff, ensuring they have the necessary knowledge and skills to effectively utilize the Yardi Voyager 7S software.

EXHIBIT B- CONSULTANT'S PROPOSED AGREEMENT FOR SERVICES

EXHIBIT C- PROPOSAL SUBMISSION INSTRUCTIONS

PLEASE READ CAREFULLY:

ISSUE DATE: March 4, 2025

PROJECT TITLE: YARDI Independent Consulting Services

DELIVERY DUE DATE/TIME: 5:00 PM, Tuesday, March 18, 2025

Proposals will be accepted until 5:00 PM, Tuesday, March 18, 2025. Proposals received after 5:00 PM, Tuesday, March 18, 2025, even if sent for submission earlier, may not be accepted. This is a Request for Proposals solicitation.

Proposals must include a proposed Agreement between the Consultant and BCACHA.

Proposals may be submitted electronically at the following email address(es):

To: jpatterson@bcacha.org

CC: mvandercar@bcacha.org

Proposals may be submitted in hard copy form by ground mail at the following address:

Boise City & Ada County Housing Authorities

ATTN: Jillian Patterson, Deputy Director

1001 S. Orchard St.

Boise, ID 83705

All questions and/or requests for additional information on this solicitation should be put into writing and directed to Jillian Patterson, Deputy Director by email at jpatterson@bcacha.org and copied to Mallory VanDercar, Administrative Services Manager at mvandercar@bcacha.org. The last date to submit questions is by 5:00pm MST Wednesday, March 12, 2025. Any questions received before or on March 12, 2025, will be addressed and provided to all proposers no later than March 14, 2025.