Request for Information, RFI 2016-04
Enterprise Line of Business Application for Housing Finance Workflow

1.   Introduction

Florida Housing Finance Corporation (Florida Housing) is a public corporation, and a public body corporate and politic created by Section 420.504, Fla. Stat. to provide affordable housing to the State of Florida. Florida Housing is seeking information regarding a comprehensive line-of-business application that is directly applicable to operations common to the housing finance vertical market. Currently, Florida Housing uses Housing Development Software (HDS) as a basis for Multi-Family Development line-of-business, and a number of internally developed applications to implement supporting processes.

NOTE: Responses to this RFI will be reviewed for informational purposes only and will NOT result in the award of a contract. Any request for cost information is for Florida Housing budgetary analysis purposes only. Vendors submitting answers to this Request for Information are not prohibited from responding to any related subsequent solicitation.

2.   Goals

Florida Housing seeks information regarding housing finance line-of-business systems with the capacity to house and maintain detailed data and status information on a large and varied property portfolio. Desired features and capabilities include:

- The allocation and tracking, and possible disbursement of resources used to fund the acquisition, development, construction, and rehabilitation of affordable housing in Florida;
- Project and asset management for affordable housing developments;
- Servicing and management of rental housing transactions;
- Comprehensive capability for data analysis, generation of data reports, and compliance process automation, tracking, and reporting;
- Staff and task management including progress tracking, milestone tracking and internal and external document tracking; and
- The ability to automate supporting processes and track data from the entirety of the Housing Finance lifecycle, from program application submission through the development and compliance lifecycles. This includes: Application, Credit Underwriting, Carryover, Closing, Final Cost Certification, Construction, Compliance, and Asset Management.

Florida Housing's primary objectives are as follows:

- Maximize process automation using, or by acquiring, a comprehensive package of feature-rich affordable housing modules;
- Extend automation to functions currently performed manually; and
- Maximize interface and data transfer capabilities to other standard software programs with minimal effort.

3.   Response Format

Responses to this Request for Information must be typed, formatted to follow the paragraphs in this section, and contain the information identified below. Additionally, an in-person presentation/demonstration may be requested following the response. **Responses must include five (5) total paper copies and one (1) CD or DVD with an electronic copy. The electronic copy must also include a redacted version of your response suitable for public release, if respondents deem anything within their responses to be proprietary. (See section 7 for additional details.) Include the following in your responses:**

A. Overview

1. Describe your understanding of the goals listed above, and your approach to helping Florida Housing accomplish those goals. Specifically:

a. General Features: A user-friendly system with intuitive navigation. Capability to customize information and data fields. Reporting capability for all modules including custom queries. The system must be secure and accessible at any time via the Internet or mobile application. Vendor must have a customer support center with well-trained staff.

b. Ability for flexible access to system data, including bulk import, export, and updates of data from and to the system. Please provide samples of the data schema and data dictionary associated with the proposed solution.

c. Robust system for vendor and partner contact registration, tracking, communications: Florida Housing desires a robust system to identify and track performance of the natural person principals of the property developer and management entities. Please describe the capability (if any) of your system to enable this goal.

d. Current Capability for integration with 3ʳᵈ Party Applications. Describe your solution's capability to integrate with industry standard 3ʳᵈ party applications, particularly any current integration with Benedict Group Loan Servicing, Microsoft Office and Microsoft Great Plains.

e. A description of capabilities beyond those delineated above: This is a placeholder for the respondent to describe what other value their implementation can provide to Florida Housing business processes, data analysis, workflow etc.

f. Capability for integration with 3rd party Partner entities. Florida Housing utilizes 3rd party service providers for loan servicing, compliance monitoring and credit underwriting. Please describe the capability of the system to allow for delegation and integration of these type tasks with partner entities.

2. Describe the suggested solution, as appropriate.

3. Explain why the suggested solution was recommended.

4. Describe the capability to customize both visual and data elements in the solution.

5. Describe the reporting capabilities of the solution.

6. Outline adherence to Section 508 Accessibility Standards.

7. Highlight the suggested solution's mobile-friendly and/or responsive design features.

8. Discuss any experience your company has in implementing the described system(s).

B. Vendor Background

1. Provide a brief history of your company including the year organized, locations, affiliated companies, and the total number of employees. Include any additional information not already included elsewhere in your response that you consider most relevant to Florida Housing.

2. Describe your company's market presence in the United States, and specify which Housing Finance Agencies and entities utilize your system.

3. Describe the level of reliance, if any, your firm places on commercial off-the-shelf, non-proprietary equipment.

C. Product Components – Provide a detailed list of products or services that will be necessary to support Florida Housing's business needs as described in your responses, to include:

1. Software, including licensing and licensing structure(s);

2. Hardware, if any, required onsite at Florida Housing;

3. Proposed geographical location for data and document storage;

4. Third party products, both required and/or optional;

5. Warranty; and

6. Maintenance & support.

D. Reporting – Describe the types of reports that will be available to Florida Housing and to individual employees using the proposed system. Provide sample reports for those typically used by and operators and administrators of the proposed system(s).

E. Business Intelligence – Describe any built in functionality regarding data-warehousing of production data and the related capabilities for current and historical data access and business intelligence reporting.

F. Cost – If possible within known parameters, provide the estimated cost of the proposed solution, including:

1. Overall initial cost for all functionalities identified;

2. Individual cost for each module/functionality;

3. Installation, implementation and configuration;

4. Data ingestion, migration, conversion and/or storage;

5. Training for appropriate Florida Housing personnel, with emphasis on IT and operations staff;

6. Any additional anticipated consulting costs not listed above;

7. Projected cost over five-year period;

8. Maintenance & support for the term of a contract, including basic process and terms surrounding enhancement and customization requests; and

9. Projected recurring subscriber costs.

G. Proposed Implementation/Maintenance

1. Provide an overview of the implementation process and its complexity.

2. Describe the timeline and level of effort to implement the system as proposed, including how the data from Florida Housing's current system would be transferred.

3. Describe the training your company would provide for employees in using this solution. Florida Housing prefers on-site, classroom-based hands-on training in labs with content tailored to use elements from our data environment, and have a facility on site.

4. Provide a technical explanation of information technology security controls including:

a. User authentication;

b. Access roles and division of duties;

c. System generated audit trails and reporting; and

d. Methods for securing and handling Personally Identifiable Information while in transit and at rest.

5. Describe the parameters of the Service Level Agreement, including a description of change management controls and release schedule(s) for security patches, bug fixes, maintenance and enhancements.

6. Describe your business continuity and/or disaster recovery plans and any additional costs associated with these plans.

4.   Response Date

Please provide responses in accordance with the timeline below, and address each RFI request/ question(s) point by point. **Responses must be clearly marked as being submitted in response to RFI 2016-04 and sent via mail to:**

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Florida Housing Finance Corporation
ATTN: Contracts Manager
227 N. Bronough Street, Suite 5000
Tallahassee, FL 32301

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Timeline:

July 22, 2016	**Vendor Questions Due, no later than 2:00 PM Eastern Time.**
July 29, 2016	**Anticipated Date to Post Responses to Questions on Florida Housing's website.**
August 10, 2016	**Vendor Responses Due, no later than 2:00 PM Eastern Time.**
August 29, 2016	**Anticipated Date to Begin Vendor Demonstrations (if applicable).**

5.   Questions

Please feel free to contact Florida Housing with any questions regarding this Request for Information. Questions to this RFI are encouraged to ensure that each response provides the desired information. Answers to all questions will be posted on Florida Housing's website at **http://www.floridahousing.org/BusinessAndLegal/Solicitations/RequestForInformation/** and will be available for anyone to view. Questions must be directed to the Contracts Manager via e-mail at: **Contracts.Manager@floridahousing.org**.

6.   Demonstrations

If after receiving vendor responses, it is determined a vendor demonstration is necessary, Florida Housing will work with the vendor to establish a date and time for a presentation. The purpose of this presentation will be for the vendor to provide a demonstration of the product and provide any information that they believe will be of value.

7.   Proprietary Information

Any portion of the submitted response which is asserted to be exempt from disclosure under Chapter 119, Florida Statutes, shall be clearly marked "exempt," "confidential," or "trade secret" (as applicable) and shall also contain the statutory basis for such claim on every page. Pages containing trade secrets shall be marked "trade secret as defined in Section 812.081, Florida Statutes." Failure to segregate and identify such portions shall constitute a waiver of any claimed exemption and Florida Housing will provide such records in response to public records requests without notifying the respondent. Designating material simply as "proprietary" will not necessarily protect it from disclosure under Chapter 119, Florida Statutes.

8.   Vendor Costs

Vendors are responsible for all costs associated with the preparation, submission, and any potential demonstration or meeting to discuss their response to this Request for Information. The Florida Housing will not be responsible for any vendor related costs associated with responding to this request.