Finance Department
Purchasing Division

REQUEST FOR PROPOSALS (RFP)
Specification No. 19-11322-C
FOR
RENT TRACKING SYSTEM

ADDENDUM "C"
September 3, 2019

Dear Proposer:

Questions received from proposers along with answers are attached.

Proposals must be received no later than 2:00 p.m., on <u>Thursday, September 10, 2019</u>. All responses must be in a sealed envelope and have **"Rent Tracking System"** and **Specification No. 19-11322-C** clearly marked on the **<u>outer most mailing envelope</u>**.

Mail or Hand Deliver To:
City of Berkeley
Finance Department/General Services Division
2180 Milvia Street, 3rd Floor
Berkeley, CA 94704

Proposals/bids will not be accepted after the date and time stated above. Incomplete bids that do not conform to the requirements specified herein will not be considered.

Thank you for your interest in working with the City of Berkeley for this service. We look forward to receiving your response.

Sincerely,

Dennis Dang
Acting General Services Manager

Addendum "C"

Questions and Answers for Specification No. 19-11322-C
RENT TRACKING SYSTEM

The City of Berkeley has received questions from some potential respondents regarding **Specification No. 19-11322-C**, **Rent Tracking System**. In an effort to provide the same information to all, listed below are the questions received to date, with responses from City staff.

1.Q. A "Training Plan" is required for an initial training for approximately 10 staff. Is this the total number of staff that require training on the new system?

1.A. *In total, there are approximately 25 staff that will require training on the new system with approximately 5 requiring additional system administration training. Multiple trainings sessions will be required as staff availability will vary; as well, staff will require training on features of the new system that specifically relate to their work unit.*

2.Q. Whether companies from Outside USA can apply for this? (like,from India or Canada)

2.A. *Companies from outside the USA may apply; but, such companies must be available during standard business hours (Monday-Friday, 8AM-5PM) PST, as well as be able to provide on-site visits as deemed necessary. See related items, Section VIII.3, third bullet-point, and Exhibit A, Section GR-7.*

3.Q. Whether we need to come over there for meetings?

3.A. *Yes. Also refer to 1.A.*

4.Q. Can we perform the tasks (related to RFP) outside USA? (like, from India or Canada)

4.A. *Yes, certain aspects of system development can be performed outside the US; however, tasks such as requirement gathering, business process mapping, UI/UX design reviews will need to be conducted locally with all communication occurring during standard business hours. Also refer to 1.A.*

5.Q. Can we submit the proposals via email?

5.A. *No. The proposer is required to submit (1) original and six (6) unbound copies. See Section VII for further details regarding proposal submission requirements.*

6.Q. FR-BAC-9. The system shall automatically recalculate the overall rent ceiling when AGAs are restored. The Rent Board staff must be able to identify the effective date of restoration of AGA. For example, if an AGA was denied on January 1 to all units due to positive AR balance on January 1, but the account is resolved on April 15, then the AGA must be able to be restored for all units with an effective date of April 15.

    a. Does this mean that if an owner has a balance / issue on any unit, then all of their units become ineligible for AGA?

6a.A. *If there is a balance on the accounts receivable, then all units on a property are ineligible for the AGA. If an owner has outstanding registration fees and / or penalties on January 1st, then they will be denied the AGA increase on January 1st of each year for all units on*

that property until the debt is paid. Once the debt is paid, then we restore the AGA for all units as of that date. AGAs on individual units can also be denied as a result of a petition, where the Hearing Examiner denies the AGAs until the issues outlined in the petition decision are resolved. Once the owner resolves the issues, the AGAs for that particular unit may be restored as of the date that the owner complies with the petition decision.

7.Q.   FR-BP-9. The system shall allow Rent Board staff to create and change the layout and content of the bills by moving and adding fields to the bill template.

    a.   Comment/Question: Will need further insight on this one. We have run into challenges using standard document generation tools to generate bills because of the data needing to come from multiple objects/tables and be presented in very specific ways. Typically we would move to a custom solution in that scenario but having a solution that staff can create or change layouts really requires a document generation tool. Can you please elaborate on this a bit and give us an example?

7a.A.   *We generate batches of bills with multiple pages as well as individual bills on demand. We generate multiple different types of bills depending on the billing cycle, and the billing information is updated over time. In our current system, we are able to modify the template using Adobe Pro's Prepare Forms tool to update the bills' language or format as needed. For example, we recently needed to edit language regarding payment methods on our batch billing statements; Registration Staff was able to make these changes directly to the template.*

8.Q.   Question "The system design and development shall specifically take into account the migration of data from the current system."
    a.   What is the volume of data to be migrated? Number of tables and approximate number of rows.

8a.A.   *Registration Database and rent ceiling history is the bulk of the data. The size of production MS SQL Server database is approximately 4GB, consisting of approximately 120-150 tables. Rent Journal and Annual AGA tables each contain roughly 1.5 million records and there are a number of tables that have approximately 500,000 records. Below is a high level breakdown of the tables based on the number of records:*

Tables with more than 1 million records	*10%*
Tables with 100-500k records	*20%*
Tables with 10-100K records	*20%*
Tables with less than 10K	*50%*

The registration database is split up into the following approximate data sets of the system as of 8/21/2019:
    i.   *Units - 35,755 rows of data;*
    ii.   *Property - 8,880 rows of data;*
    iii.   *Property owners - 3,015 rows of data; and*
    iv.   *Agents – 1,336 rows of data.*
    v.   *Accounts receivables – The 8,800 properties has an associated accounts*

receivables history that must be migrated.

vi. *Rent history data: For every one of 35,755 units in the database there is an associated rent history ranging from 0 (units that have no rent history) to nearly 40 years' worth of rent ceiling/rent adjustment data.*

The case management database has approximately 50,000 rows of data
The petitions database has approximately 800 rows of data.
The mediations database has approximately 500 rows of data.

Additionally, there are approximately 30 gigabytes of documents of output (PDF, MS Excel, MS Word files) from the current system.

b. Should we assume that for every functional area identified in the requirements, there is an existing data set that needs to be migrated?

8b.A. *For the most part, yes. However, not all system function requirements have existing data sets as some of the functions in the RFP would be new features that we are looking to incorporate. For instance, there isn't a data set for the FR – Collection Process, since this would be an added feature. All of the registration function requirements have data sets and same with all of the petition data sets as well. Data belonging to a functional area has been captured using multiple tables in the database.*

c. How many systems will data need to migrated from?

8c.A. *All the data from the current system is stored in a MS-SQL Database Server which will require migration to the new system's data structure. Also Word, PDF documents, and email attachments that are currently stored on a shared network drive will require migration to the new System's document management.*

9.Q. Integrations

a. FR-I-3. The system shall have the ability to automatically create cases and any relevant data entries from information sent to designated emails.

i. Question: We need to define up front what those automations are. Cases will be ok but "any relevant data entries" via email would need to be developed/setup/configured. Is there anything more this requirement that we need to know (for example: a sample of information sent to designated emails)

9ai.A. *At minimum, the system shall have the capability to identify the below:*
- *user – based on sender's email address*
- *case – based on case number used in the email subject or body*
- *property or unit – based on property address in the email subject or body*
- *Case type – based on predefined case types names.*

b. Is there a separate financial system of any sort that needs to be integrated with?

9b.A. *The new system is expected to generate a batch payment report (Excel) that can be used in reconciling payments with the City's Financial System. The reconciliation will*

continue to be a manual process.

    c. Will Property Finder need to be integrated with or will that functionality completely exist in the new system?

9c.A. *Property Finder will cease to exist as a separate tool with the new system. A desired objective is that the current functions of Property Finder are integrated within the new system. Please also note FR-PP-15.*

10.Q. FR-RD-8. The system shall produce reports that are exportable to csv, excel, and pdf. The system shall produce the following reports:

    a. Question: Certain things are not yet available to export to pdf in our recommended platform. How critical are reports being exported specifically to pdf vs csv or excel? Can you give us an example?

10a.A. *For reports specifically, and in regards to reports used frequently by registration, the most important formats are CSV and Excel. However, we currently heavily rely on PDFs for forms-based communications between the agency and tenants/property owners. For example, we rely on PDFs for both batch generation and individual generation of rent ceiling notices, rent validation reports, billing statements, property-specific Unit Status Forms, eviction letters, and waiver recommendations. These need to be generated through editable PDFs that can be printed, saved, and edited.*

11.Q. Will this be the primary tool for all staff or will this only be used by a subset of staff?

11.A. *Yes, this will be the primary tool for all staff. Data entry for matters related to registration, rent ceiling, counseling, evictions, and hearings will be performed by various and unique subsets of staff; all staff will rely on this tool for review, generating reports, accessing property-specific information, etc.*

12.Q. How many users of the new system will there be?

    a. Internal (staff) users – noted that training plan estimates about 10 internal staff, is that the total number of staff users?

12a.A. *There will be approximately 25 staff that will use the new system.*

    b. External (portal) users – noted that there are 17500 active units being tracked and that the portal shall support unlimited named users and 1000 concurrent user sessions. However is there an estimate of how many total external users there will be?

12b.A. *There are approximately 1,000 property owners using the system. On average, there are 10 external users using the system concurrently with peak weeks in registration season during which the number jumps to 50 users. This is estimated based on observable actions taken. The proposed solution shouldn't have any limitation on the number of named users that can be added to the system.*

13.Q. Security

    a. Will all staff be able to see all records in the system or will there be limitations. Example staff member A can see tenant 1 and staff member B can see tenant 2 but staff member A cannot see tenant 2 and B cannot see 1.

13.A. *There are no limitations for what internal staff can see. There are only limitations in what tasks each staff member can do. The new system shall have an ability to assign permissions to user and groups to control actions that each staff members can perform. We currently have a search function for the public that shows a window into the database with some statuses masked. For external users who use our Online Registration portal, we require verification and then give them access to the properties that they own or manage for the most recent information in our database.*