

**AD
REQUEST FOR PROPOSALS
5965
Utility Management System**

The Seattle Housing Authority (SHA) is seeking proposals from qualified consultants to assist SHA in providing Utility Management System.

Pre-Submission Conference: SHA will hold a Pre-Submission Conference on Wednesday, June 05, 2024 at 1130am PDT. Potential proposers can email Sadia Ikram, Sr. Contract Administrator at sadia.ikram@seattlehousing.org to request a link and you will be sent an invitation to join.

Obtaining the RFP: Visit our website at <https://www.seattlehousing.org/do-business-with-us/solicitations> to obtain a copy of the RFP. Any addenda issued for this RFP will be published at the above-referenced website and proposers are responsible for checking the website prior to submission of proposals for any addenda. If you are unable to download the RFP or addenda, you may e-mail Sadia Ikram, Contract Administrator at sadia.ikram@seattlehousing.org.

Questions: Any questions or requests for further information must be submitted in writing no later than 2pm PDT, on Friday June 07, 2024 to the Contract Administrator noted above by e-mail at sadia.ikram@seattlehousing.org

Submission Deadline: Proposals must be received by 2pm PDT on Monday, June 24, 2024 at the Contract Administrator's e-mail address noted above.

Diversity: SHA strongly encourages minority-owned and women-owned businesses, socially and economically disadvantaged businesses, HUD Section 3 businesses, small businesses and veteran-owned businesses to submit proposals or to participate in a subcontracting capacity on SHA contracts.

Rights Reserved: SHA reserves the right to waive as an informality any irregularities in submittals, and/or to reject any and all proposals.

Diana Peterson,
Procurement and Contracts Manager

CONSULTANT REGISTRATION FORM

If you plan on submitting a Proposal for this project, please complete this registration form and e-mail it to *Sadia Ikram, Sr. Contracts Administrator at sadia.ikram@seattlehousing.org* so that you can be contacted directly if necessary.

SEATTLE HOUSING AUTHORITY

RFP Solicitation No. 5965

Utility Management System

Name of Firm: _____

Business Address: _____

Contact Information:

Name: _____

Title: _____

Telephone #: _____

Fax #: _____

e-mail: _____

Thank you.



REQUEST FOR PROPOSALS

(SOLICITATION NO. 5965)

for

Utility Management System

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ATTACHMENTS:

- Functional Fit Requirement Excel Sheet

A. FORMS:

- Vendor Fact Sheet
- Suspension and Debarment Compliance Certificate for Consultant
- Suspension and Debarment Compliance Certificate for Sub-Consultants (if applicable)

RFP Issued On:	Proposal Due:
Wednesday, May 22, 2024	2pm PDT on Monday, June 24, 2024

Seattle Housing Authority
Request for Proposals (Solicitation No. 5965)
Utility Management System

A. INTRODUCTION

- 1) **General:** The Seattle Housing Authority (SHA) is seeking a qualified professional firm to provide utility management system.
- 2) **Seattle Housing Authority Background:** SHA is a public body corporate and politic that provides affordable housing to about 34,000 low-income people in Seattle. SHA operates according to the following Mission and Values:

Our Mission

Our mission is to enhance the Seattle community by creating and sustaining decent, safe and affordable living environments that foster stability and increase self-sufficiency for people with low-income.

Our Values

As stewards of the public trust, we pursue our mission and responsibilities in a spirit of service, teamwork, and respect. We embrace the values of excellence, collaboration, innovation, and appreciation.

The mission of the Seattle Housing Authority is to enhance the Seattle community by creating and sustaining decent, safe and affordable living environments that foster stability and self-sufficiency for people with low incomes. SHA provides long-term, low-income rental housing and rental assistance to more than 34,000 people in Seattle. SHA owns and operates approximately 8,000 units at nearly 400 sites throughout the city. SHA also administers more than 10,000 Housing Choice Vouchers, enabling low-income residents to receive rental assistance throughout the Seattle housing market. SHA, an independent public corporation established in 1939, is governed by a seven-member Board of Commissioners, two of whom are SHA residents. Commissioners are appointed by the Mayor and confirmed by the City Council. More information is available at www.seattlehousing.org.

- 3) **Women and Minority Business Enterprise (WMBE) Inclusion:** Reserved.
- 4) **Race and Social Justice Initiative (RSJI):** SHA is committed to advancing racial and other social justice equity and has a focused affirmative plan to educate staff on the effects of racism and other oppressions on the work of SHA, our employees, residents and stakeholders; and to eliminate institutional racism and other oppressions at SHA.
- 5) **Cooperative Purchasing:** RCW 39.34 allows cooperative purchasing between public agencies (political subdivisions) in the State of Washington. Public agencies that file an Interlocal Joint Purchasing Agreement with SHA may also wish to procure the services herein offered by the successful party. The successful party shall have

the option of extending its offer to SHA to other agencies for the same cost, terms and conditions.

SHA does not accept any responsibility for agreements, contracts or purchase orders issued by other public agencies to the successful party. Each public agency accepts responsibility for compliance with any additional or varying laws and regulations governing purchase by or on behalf of the public agency. SHA accepts no responsibility for the performance of the successful party in providing services to other public agencies, nor any responsibility for the payment price to the successful party for other public-agency purchases.

B. SUBMITTAL REQUIREMENTS

Schedule:

Activity	Location	Day	Date	Time
Pre-Submittal Meeting	If you have MS Teams and would like to join the meeting virtually, please e-mail Sadia Ikram, Contract Administrator at sadia.ikram@seattlehousing.org and you will be sent an invitation to join.	Wednesday	June 05, 2024	1130am PDT
Deadline for Questions	By email	Friday	June 07, 2024	2pm PDT
SUBMITTAL DEADLINE AND DELIVERY INFORMATION				
E-Mail to: Sadia Ikram sadia.ikram@seattlehousing.org		Monday	June 24, 2024	2pm PDT

Questions: Questions must be submitted via email prior to the Deadline for Questions date and time shown above.

Addenda: In the event there are changes or clarifications to this RFP, SHA will issue an addendum. Addenda will be published on SHA's website at: <https://www.seattlehousing.org/do-business-with-us>. It is the responsibility of proposers to check this website before submitting and downloading any addenda issued. If you are unable to download the addenda, you may e-mail the Contract Administrator, Sadia Ikram at sadia.ikram@seattlehousing.org to have a copy of the addenda mailed or e-mailed to you.

Pre-Submittal Meeting: Proposers are strongly encouraged to attend a Pre-Submittal Meeting at the date and time indicated above.

Submittal: The deadlines given above are firm as to place, date, and time. SHA will not consider any proposal received after the deadline.

All proposals should be clearly marked when e-mailed to avoid any confusion about recording arrival dates and times. Proposers should take this practice into account and submit their materials early to avoid any risk of ineligibility caused by

unanticipated delays or other delivery problems. *NOTE: A faxed or hand delivered proposal is not acceptable.*

All proposals received will become the property of the Seattle Housing Authority and will not be returned to the Proposer.

Proposals should be limited to a maximum of 10 pages single sided, or 5 pages double sided in no smaller than 11-point font on 8½" by 11" sheets. The following are NOT INCLUDED in the page limit mentioned above: your cover letter, vendor fact sheet, resumes, Certifications and Representations of Offerors – Non-Construction Contract (form HUD-5369-C), the Suspension and Debarment Certificate for Consultant, and any applicable Section 3 form(s). Your **cover letter** should express your interest in performing the work. A principal or officer of the firm authorized to execute contracts or other similar documents on the firm's behalf must sign the letter.

1) Required number of copies: Proposers responding to this RFP shall submit their proposal to the e-mail address indicated above. **The following items/forms are to be submitted as a separate file and not included in your Proposal.** Do not include these items/forms in the proposal.

- Price / Rates
- Vendor Fact Sheet
- Suspension and Debarment Compliance Certificate for Consultant
- Suspension and Debarment Compliance Certificate for Sub-Consultants

2) Proprietary Proposal Material:

Any records or materials submitted to SHA in response to this RFP become public records under Washington State law (see RCW Chapter 42.56, the Public Disclosure Act, at <http://www1.leg.wa.gov/LawsAndAgencyRules>). Public records must be promptly disclosed upon request unless a statute exempts disclosure. Exemptions from disclosure include trade secrets and valuable formulas (see RCW 42.56 and RCW Ch. 19.108); however, public disclosure exemptions are narrow and specific. Proposers are expected to be familiar with any potentially-applicable exemptions, and the limits of those exemptions.

Proposers are obligated to separately bind and clearly mark as "proprietary" information any proposal records they believe are exempted from disclosure. The body of the proposal may refer to these separately-bound records. Proposers should mark as "proprietary" only that information they believe legitimately fits within a public-disclosure exemption. SHA may reject solicitation responses that are marked proprietary in their entirety.

If SHA receives a public disclosure request for records that a Proposer has marked as "proprietary information," SHA may notify the Proposer of this request and postpone disclosure briefly to allow the Proposer to file a lawsuit under RCW 42.17.330 to enjoin disclosure; however, this is a courtesy of SHA and not an obligation.

SHA has no obligation to assert an exemption from disclosure. If the Proposer believes that its records are exempt from disclosure, the Proposer is obligated to

seek an injunction under RCW 42.56. By submitting a proposal, the Proposer acknowledges this obligation; the Proposer also acknowledges that SHA will have no obligation or liability to the Proposer if the records are disclosed.

- 3) **Cost of Preparing Proposals:** SHA will not be liable for any costs incurred by the Proposer in the preparation and presentation of proposals submitted in response to this RFP including, but not limited to, costs incurred in connection with the Proposer's participation in demonstrations and the pre-proposal conference.
- 4) **Rights Reserved by SHA:** SHA reserves the right to waive as an informality any irregularities in submittals and/or to reject any or all proposals. SHA requests that companies refrain from requesting public disclosure of selection information until a contract has been executed as a measure to best protect the solicitation process, particularly in the event of a cancellation or re-solicitation. With this preference stated, SHA shall continue to properly fulfill all public disclosure requests for such information as required by State Law.

C. SCOPE OF WORK

The scope of work for the Utility management system are as follows:

- Billing features
 - Seamless entry/import of bills into the system to avoid manual entry.
 - Automatically split billed amounts to individual GL accounts for easy importing to E1.
 - Streamlined way to make payments to utilities.
- Utilities consumption analysis/reporting to use in resource conservation planning.
 - Compare buildings to each other.
 - Detect spikes in usage (i.e. For water leak detection)
 - Compare consumption before/after interventions (i.e. weatherization or appliance upgrades)
 - Data can be easily viewed/shared.
- Integration with our own system(s) and/or customizability
 - Ability to analyze utilities data alongside other data we have, such as population demographics, building type, environmental factors.
 - Ability to build custom reports.

D. INFORMATION TO BE PROVIDED IN YOUR PROPOSAL

Response / Proposal Content: To facilitate evaluation, proposals should address and be organized in the order of the outline given below and include the following information:

- Cover Letter
- Address each of the evaluation criteria below:
 - Relating to Criterion 1: **Race and Social Justice Initiative (RSJI)**
 - Provide a detailed Plan describing your firm's good faith efforts to identify and address racism and other oppressions both within and without your organization.

- If applicable, please indicate training, tools and other resources that are available for your employees to work proactively for race and social justice equity.
- If applicable, state steps or processes in place that enable your organization to provide services in a culturally responsive and relevant way.
- **Relating to Criterion 2: Proven Vendor**
Please describe your experience providing and managing utility management systems. Please include if you have provided or are providing product and services to other public entities and or housing authorities, please include length of time in business, total number of clients, total number of public sector clients and with other matters relating to relevant experience.
- **Relating to Criterion 3: Functional Fit**
Please provide your organization's capability and software requirements in the attached sheet. Please refer to page 11.
- **Relating to Criterion 4: Technical Fit**
Please describe the overall architecture of your solutions. Provide details around data storage and if the application is hosted on cloud or on premises.
- **Relating to Criterion 5: Maintenance Support**
Please describe the plan/approach your organization will provide for ongoing maintenance support. Routine support must be available Monday through Friday 0800am to 0500pm Pacific time. Urgent and emergent support must be available 24/7 via phone and electronic communication. Please include your response time for routine issues as well as emergent needs. Please provide the operational overhead and maintenance process
- **Relating to Criterion 6: Cost**
Please provide the cost of subscription services, BillCapture services and the maintenance support services. Define any tiers of service and costs associated with those tiers.
- **Relating to Criterion 7: Implementation Risk**
Please describe your implementation plan. Please explain the data migration plan, timeline, and any risk associated with it.
- **Relating to Criterion 8: Security**
Please describe your data security practices regarding secure application development, share your organization's plan/process to keep the data secured.
- **Relating to Criterion 9: Integration**
Please describe how the product will be integrated with the ERP or any other system if required.
- **Provide resumes for the key personnel** named in your response.
- **Include a list of at least three references** for whom the firm or team members have performed similar work in the last five years (including agency or business name of client, contact person, address, telephone number and e-mail address if available.)

E. CONSULTANT EVALUATION CRITERIA

Consultants' submittals will be evaluated based on the criteria listed in this section and further described in Section D above. In preparing the submittal to SHA, it is important for proposers to clearly demonstrate their expertise in the areas described in this document. Because multiple areas of expertise are required for successfully performing this project, the Consultant, either through in-house staff or sub-consultants, must demonstrate

expertise and have available adequate numbers of experienced personnel in all of the areas described.

Consultants are encouraged to identify and clearly label in their submittal how each criterion is being fully addressed. Evaluation of responses to this RFP will be based only on the information provided in the submittal package, and if applicable, interviews, and reference responses. SHA reserves the right to request additional information or documentation from the firm regarding its submittal documents, personnel, financial viability, or other items in order to complete the selection process. In submitting a proposal, the Consultant and any sub-consultants agree that any costs, prices, hourly rates proposed shall be valid for a minimum of 90 days from the proposal due date.

The following criteria with a point system of relative importance with an aggregate total of 90-points will be utilized to evaluate the qualifications of each proposer:

Evaluation Criteria – Qualifications		Weighting (Max. Points)
1	Race and Social Justice Initiative (RSJI) (See Section D above for a complete description of this Criterion.)	10
2	Proven Vendor (See Section D above for a complete description of this Criterion.)	10
3	Functional Fit (See Section D above for a complete description of this Criterion.)	15
4	Technical Fit (See Section D above for a complete description of this Criterion.)	15
5	Maintenance Support (See Section D above for a complete description of this Criterion.)	5
6	Cost (See Section D above for a complete description of this Criterion.)	10
7	Implementation Risk (See Section D above for a complete description of this Criterion.)	5
8	Security (See Section D above for a complete description of this Criterion.)	10
9	Integration (See Section D above for a complete description of this Criterion.)	10
MAXIMUM TOTAL POINTS FOR QUALIFICATIONS		90

F. SELECTION PROCESS

An evaluation panel will rate all responses to this RFP that are received on or before the stated deadline, according to the criteria listed above. Based on its initial evaluation, the panel may:

1. Make a recommendation to SHA's Executive Director and request authority to negotiate a Contract with one or more proposers; or

2. Request additional information from the proposer or proposers whose responses appear to have the greatest likelihood of success; and/or
3. Invite one or more proposer whose responses appear to have the greatest likelihood of success to attend an interview/presentation to discuss their proposal; and then make a recommendation to SHA's Executive Director and request authority to negotiate a contract with one or more proposers.

SHA reserves the right to conduct reference checks at any time during the evaluation process.

In the event that information obtained from the reference checks reveals concerns about any proposer's past performance and their ability to successfully perform the contract to be executed based on this RFP, SHA may, at its sole discretion, determine that the Proposer is not a responsible proposer and may select the next highest-ranked Proposer whose reference checks validate the ability of the Proposer to successfully perform the contract to be executed based on this RFP. In conducting reference checks, SHA may include itself as a reference if the Proposer has performed work for SHA, even if the Proposer did not identify SHA as a reference.

By submitting its proposal in response to this RFP, the consultant accepts the procurement method used and acknowledges and accepts that the evaluation process will require subjective judgments by SHA and the evaluation panel.

Any protest of the selection process shall be resolved in accordance with SHA's Procurement Policies, which may be reviewed at the following web site address:

<https://www.seattlehousing.org/sites/default/files/Procurement%20Policies.pdf>

G. CONTRACT NEGOTIATIONS

SHA shall negotiate with the most qualified Proposer or Proposers, as determined by evaluation of the responses and, if applicable, interviews. If SHA is unable to reach agreement with any of the highest ranked firms, it may negotiate with the next highest ranked firm or firms, proceeding in turn to each firm that SHA has determined to be qualified, in order of rank. If agreement cannot be reached with any qualified firm, SHA reserves the right to cancel the solicitation.

SHA expects to execute one or more Contracts for services for one year. At SHA's option, a Change Order may be executed extending the Contract(s) for up to four additional one-year periods, along with appropriate adjustments in the scope of work and compensation. The Contract shall not exceed five-years.

H. ADMINISTRATIVE INFORMATION

- 1) **Small and/or Disadvantaged Business Enterprise Requirements:** SHA strongly encourages minority-owned and women-owned businesses, socially and economically disadvantaged business enterprises, HUD Section 3 businesses, small businesses and veteran-owned businesses to submit proposals, to participate as partners, or to participate in other business activity in response to this RFP.

2) **Section 3 Requirements:** Reserved

3) **Basic Eligibility:** By submitting for this Solicitation:

- A. Proposer represents that it is licensed to do business in the State of Washington and it has a state Unified Business Identifier (UBI) number.
- B. Proposer represents by its submission of the SUSPENSION AND DEBARMENT COMPLIANCE CERTIFICATE FOR CONSULTANT form, attached hereto, that neither it nor its principals/officers are presently debarred, suspended, proposed for debarment, or declared ineligible or voluntarily excluded from participation in this transaction by any federal department or agency. Proposer further represents that by submitting a Proposal and being selected for this work, that it will comply with the requirements regarding sub-contracting and the purchase of supplies or materials for this work and the sub-contractors and/or firms, and their principals/officers are not debarred or otherwise disqualified from doing business with SHA. The Proposer understands that if selected, it shall provide evidence with the SUSPENSION AND DEBARMENT COMPLIANCE CERTIFICATE FOR SUB-CONSULTANTS form attached to this RFP of Proposer's sub-contractors' (if applicable) eligibility.

4) **Payment Requirements:** Proposers should be aware that SHA will only make payments on the contract issued under this RFP after the work being billed has been completed, and within 30 calendar days of receipt of a properly prepared and SHA approved invoice from the Consultant. Supporting documentation is required for payment of reimbursable expenses. No advance payments will be made to the Consultant, who must have the capacity to meet all project expenses in advance of payments by SHA.

5) **Approval of Sub-Consultants:** SHA retains the right of final approval of any sub-consultant of the selected Proposer who must inform all sub-consultants of this provision.

6) **Documents Produced:** All construction drawings, reports, specifications, and other documents produced under contract to SHA must be submitted to SHA in both hard copy and a digital format that meets SHA's requirements, using Microsoft Office or AutoCad products in an IBM-compatible format. All documents and products created by the Consultant and their sub-consultants shall become the exclusive property of SHA.

7) **Other Contracts:** During the original term and all subsequent renewal terms of the contract resulting from this RFP, SHA expressly reserves the right, through any other sources available, to pursue and implement alternative means of soliciting and awarding similar or related services as described in this RFP.

8) **Funding Availability:** By responding to this RFP, the Proposer acknowledges that for any contract signed as a result of this RFP, the authority to proceed with the work is contingent upon the availability of funding.

- 9) **Contract Requirements:** Proposers may review a sample of SHA's standard contract language that will form the basis for any contract executed based on this solicitation by visiting the following link:

https://seattlehousing.org/sites/default/files/Consultant_Professional_Services_Contract.pdf

SHA's standard contract document is intended to guide you in developing your proposal. The actual contract that the successful Proposer and SHA will sign will be based on this sample contract. Please be advised that SHA will only negotiate some aspects of the contract. Much of the contents of the sample contract are based on non-flexible requirements and cannot be modified in any form.

- 10) **Insurance:** The following are the insurance requirements that will be included in the contract executed based on this RFP:

A. General Requirements:

1. Prior to undertaking any work under this contract and for the duration of this contract, Consultant will procure and continuously maintain at its own expense, insurance coverage as specified below, covering performance of the work under this contract by Consultant and its agents, representatives, employees and/or subcontractors if applicable.
2. Consultant's insurance will be primary and non-contributory as respects any insurance or self-insurance maintained by SHA, and will include a severability of interests clause for applicable coverages.
3. Failure of Consultant to fully comply with the insurance requirements of this order will be considered a material breach of order and, at the option of SHA, will be cause for such action as may be available to SHA under other provisions of this order or otherwise in law, including immediate termination of the order.
4. SHA reserves the right to waive any of the insurance requirements of this contract at its sole discretion.
5. Coverage will be placed with financially sound and responsible companies acceptable to SHA which are authorized to do business in the State of Washington.
6. Consultant's policies will provide waivers of subrogation by endorsement or otherwise when applicable.

A. Required Insurance Coverage: Consultant will maintain and provide evidence of insurance in the following types and amounts:

1. **Commercial General Liability Insurance.** A policy of Commercial General Liability insurance including bodily injury, property damage, and products/completed operations, written on an industry standard form (GC 0001 or equivalent) occurrence form, with limits of at least \$1,000,000 each occurrence, and \$2,000,000 in the aggregate.

- a. Coverage will extend to cover the use of any mobile equipment on the site or sites of the work of this contract. In the event that the services to be provided under this order involve Consultant's unsupervised access to by minor children, and/or elderly, disabled or vulnerable adults as defined in RCW 74.34.020, Consultant may be asked to provide evidence that sexual misconduct coverage has not been excluded from the policy. Acceptable evidence of sexual misconduct coverage is subject to approval by SHA's Risk Manager.
2. Professional Liability/Errors and Omissions Insurance. A policy of Errors and Omissions or Professional Liability insurance appropriate to the Consultant's licensed profession with limits of at least \$1,000,000 per occurrence and in the aggregate.
 - a. If coverage is provided on a claims-made form, Consultant will maintain coverage for a minimum of three (3) years from the date of completion of the work authorized by the Contract.
3. Information Privacy and Security Liability Insurance. A policy of Cyber Liability, or Information Security and Privacy, insurance, including both first- and third-party coverage, and covering claims involving privacy violations, information theft, damage to or destruction of electronic information, extortion and network security with minimum limits of \$1,000,000 on each occurrence.
 - a. Coverage may be provided by either a stand-alone policy or included within the Professional Liability policy.

C. Proof of Insurance and Insurance Expiration:

1. Consultant will furnish certificates of insurance (and policy endorsements if needed) as evidence of compliance with the insurance requirements of the order.
2. The Seattle Housing Authority, and any limited liability partnership for which SHA serves as managing agent, will be named as an Additional Insureds on all liability policies of the Consultant other than professional liability policies.
3. SHA reserves the right to request complete copies of all required insurance policies at any time during the term of the contract.
4. If subcontractors will perform work under this contract, Consultant will
 - a. include all subcontractors at any tier as insureds, and ensure that the Consultant's coverage of subcontractors under the Consultant's policies is not excluded by any policy provision or endorsement, or, alternatively,
 - b. Obtain from each subcontractor not insured under the Consultant's policy or policies of insurance, evidence of insurance meeting all the requirements of this order and maintain such evidence on file for a period of one year after the completion of this order and, upon request, submit such evidence to SHA for examination.
5. The Consultant's insurance will not be reduced or canceled without forty-five (45) days prior written notice to SHA.

Functional Fit Requirement

Organization Capability	Software Requirements	Priority Level (1-Required, 2-Desired, 3-Nice to have)	Response ("3" for yes, "2" Partially meeting the requirement, "1" don't have it)	Vendor Comments
Utility Billing	Seamless entry/import of bills into the system to avoid manual entry	1		
	Automatically split billed amounts to individual GL accounts for easy importing to E1.	1		
	Bill capture enrollment and Transactions	1		
	Streamlined way to make payments to utilities - Payment made directly through the platform	2		
Consumption Analysis &Reporting	Utilities consumption analysis/reporting to use in resource conservation planning	1		
	Compare buildings in terms of usage of energy(electricity, Gas), water, Garbage & sewage (Seattle Public utility)	1		
	Detect spikes in usage (i.e.. for water leak detection)	1		
	Compare consumption before/after interventions (i.e.. weatherization or appliance upgrades)	1		
	Data can be easily viewed/shared	1		
	Import existing historical data from current database	1		
	Ability to build custom reports	1		
	Dashboard view of all building & comparison	1		
	Ability to analyze utilities data alongside other data we have, such as population demographics (Yardi integration), building type, environmental factors, etc.;	1		
General system features	Unlimited number of logins, with ability to customize access levels	1		
	Total consumption and bills-			
	Separates into different GL codes, property info, merges data and splits the data into report	1		
Accounts payable	Ability to export billing data into Excel for easy import into E1 and future ERP system, including the following fields: -charge amount -consumption units -consumption unit type -Vendor ID -Vendor Name -Batch ID (if applicable) -G/L Account String -G/L Date -Invoice Date	1		
	Produce a standard Invoice document to include with Excel export for documentation of payment	1		
Accounts payable	Attach G/L Date to each transaction for reporting and accrual purposes	1		
Accounts payable	Best practice calculation of utilities accruals including consumption units	1		

Attachment A

FORMS

The forms attached hereto are to be completed and submitted as a separate document when you submit your proposal.



VENDOR FACT SHEET

Return this Form TO: Seattle Housing Authority, Purchasing Division,
ATTN: **Sadia Ikram** at sadia.ikram@seattlehousing.org
101 Elliott Avenue W, Suite 100, PO Box 79015, Seattle, WA 98119

General Business Information

Name of Business, Organization, or Name of Person (if payment is to an individual):

Mailing Address for Payments:

City:	State:	Zip Code:	E-Mail Address:
Telephone No.:	Fax No.:	DUNS No.:	UEI (if applicable):
Washington UBI No.:	City of Seattle Business License No.:	Washington Contractor's License No.:	

Employee Tax ID No. (TIN) or Social Security No. (if Individual):

President/General Manager:	Principal products and/or services offered:
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Type of Organization (check one)

Individual <input type="checkbox"/>	Sole Proprietor <input type="checkbox"/>	Partnership <input type="checkbox"/>	Corporation <input type="checkbox"/>	Governmental Agency <input type="checkbox"/>	Other _____ <input type="checkbox"/>
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Substitute IRS Form W-9 Certification:

Under penalties of perjury, I hereby certify that the number shown on this form is my correct taxpayer identification number, and that I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and I am a U.S. person (including a U.S. resident alien). **Note:** The Internal Revenue Service does not require your consent to any provision of this document other than the certifications required to avoid backup withholding.

SIGN HERE	Signature of U.S. Person	Date
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Ownership Status (check all that apply):

<input type="checkbox"/> MBE (Minority-Owned Business Enterprise)	<input type="checkbox"/> HUD Section 3 Business
<input type="checkbox"/> WBE (Women-Owned Business Enterprise)	
<input type="checkbox"/> MWBE (Minority / Women-Owned Business Enterprise)	
<input type="checkbox"/> CBE (Combination Business Enterprise)	
<input type="checkbox"/> Small Business	
<input type="checkbox"/> Certified by OMWBE (Washington State Office of Minority and Women's Business Enterprises)	
<input type="checkbox"/> Self-Identified (SHA may request a signed statement re: self-certification)	

Racial/Ethnic Status (check one):

<input type="checkbox"/> Caucasian (1)
<input type="checkbox"/> African American (2)
<input type="checkbox"/> Native American (3)
<input type="checkbox"/> Hispanic American (4)
<input type="checkbox"/> Asian/Pacific American (5)
<input type="checkbox"/> Hasidic Jews (6)

Method of Contract Payments: As outlined on the reverse side of this form, for contracts over one million dollars, SHA's method of contract payments is through an electronic virtual credit card issued by SHA's e-payables vendor, Bank of America. Unless SHA grants a waiver, Vendors will receive an enrollment form from SHA following issuance of a contract.

SIGN BELOW:

Signature of Authorized Representative of Vendor:	Date:
---	-------

By signing immediately above, the Vendor hereby represents the following:

- The Vendor certifies that to the best of its knowledge and belief, neither it, nor any person/principal or firm which has an interest in the Vendor's firm, is ineligible to participate in a SHA contract, purchase order, direct pay or other transaction, pursuant to the Certification of Eligibility provision specified in the Vendor Fact Sheet Instructions, or;
- The Vendor will comply with SHA's General Terms and Conditions applicable to Purchase Orders (available at SHA website <https://www.seattlehousing.org/>, DO BUSINESS WITH US page, under FORMS AND POLICIES), if the Vendor will be supplying goods and/or services through an SHA Purchase Order.

Vendor Fact Sheet Instructions

In order for SHA to make payments to you or to procure goods or services from you, we need the information requested on the Vendor Fact Sheet, which also serves as a substitute IRS W-9 Form. The information will be entered into our computerized payment system and will allow us to make required reports to the Federal government about our business and payment transactions. If you have any questions about completion of the Vendor Fact Sheet, please call us at (206) 615-3379.

UEI (Unique Enterprise Identifier): UEI is the primary means of entity identification for federal awards. It is required in accordance with [2 CFR Part 25](#). If you are currently registered in The System for Award Management (SAM.gov), you have already been assigned a UEI. Otherwise, get a UEI by visiting [SAM.gov](#) --- obtaining an UEI is free and validates your legal business name and address.

Substitute IRS Form W-9 Certification: In completing the Vendor Fact Sheet, you must sign the “Substitute IRS Form W-9 Certification” or backup withholding will apply. If you are subject to backup withholding and you are merely providing your correct taxpayer identification number to SHA, you must cross out the portion of the certification after the word “and” in line two, through the end of line five, before signing the form. Detailed instructions about IRS Form W-9 are included on the form, which may be obtained by calling our office at (206) 615-3379 or visiting the IRS web site at [www.irs.gov](#).

Certification of Eligibility: In order to do business with SHA, the Vendor must be eligible to:

- 1) Be awarded contracts by any agency of the U.S. Government, HUD, or the State in which this Contract work is to be performed; or,
- 2) Participate in HUD programs pursuant to 24 CFR Part 24.

Use the websites of the [General Services Administration](#) and the [U.S. Department of Housing and Urban Development](#) to verify eligibility of the firm and its principals. By signing the Vendor Fact Sheet, the Vendor understands that the certification of eligibility is a material representation of fact upon which reliance was placed when SHA agreed to enter into the transaction with the Vendor. SHA may require the Vendor to submit such certification on an annual basis depending on the terms of its contract or the frequency of its business transactions with SHA. If the Vendor subcontracts any portion of the work, the Vendor will be required to submit a similar certification of eligibility to SHA for any Vendor subcontracts. Any written contract executed between SHA and the Vendor shall include these provisions, which may also be referred to as Suspension/Debarment provisions.

Contract Payments: Unless SHA grants a waiver, its method of contract payment for contracts of one million or more is through its Bank of America e-payables program. Payments will be made electronically through a virtual Visa credit card. Benefits for using this method include reduced labor costs associated with the processing of checks and enhancing cash flow by eliminating float time associated with the mailing of checks. For more details, please visit [www.bankofamerica.com/epayablesvendors](#). For new vendors, SHA will automatically send an enrollment form upon contract award. If you have questions, please contact Tran Wong, SHA's Accounts Payable Manager, at 206-615-3483 or twong@seattlehousing.org.

Small Businesses: *The Vendor Fact Sheet also requests information about whether your business is owned and controlled by women or minorities, and/or is a small business. The following are definitions of these terms for your use. This section provides valuable information to SHA in its efforts to ensure its contracting program meets its diversity objectives and requirements.*

- **WMBE:** Minority and women-owned business enterprises must either be self-identified or certified by the Washington State Office of Women's and Minority Business Enterprises (OMWBE) to be at least fifty-one percent owned by women and/or minority group members. For self-identification as WMBE, refer to [Minority/Women Owned Business Enterprise Self-Identification Form for Work Performed on Seattle Housing Authority Projects](#)
- **Small Business:** A small business means a business concern, including its affiliates, that is independently owned and operated, not an affiliate or subsidiary of a business dominant in its field of operation, and qualified as a small business under the criteria and size standards in 13 CFR 121. Furthermore, a business is considered small according to the Small Business Administration's established guidelines provided to such businesses.

HUD Section 3 Business: A business that meets at least one of the following criteria, documented within the last six-month period: (1) at least 51% owned and controlled by low- or very low-income persons; (2) over 75% of the labor hours performed for the business over the prior three-month period are performed by Section 3 workers; or (3) a business at least 51% owned and controlled by current public housing residents or residents who currently live in Section 8-assisted housing. More detailed information available at the website of [the U.S. Department of Housing and Urban Development](#).

SEATTLE HOUSING AUTHORITY

SUSPENSION AND DEBARMENT COMPLIANCE CERTIFICATE FOR CONSULTANT

By signing below, the Consultant certifies that to the best of its knowledge and belief neither its firm nor any of its principals as named below are presently debarred, suspended, or have been declared ineligible or are excluded from participation in this transaction by any federal, state or local government.

Consultant's Firm Name: _____

Address: _____

City, State, Zip: _____

	PRINCIPAL(S) Name(s)	Title(s)
1		
2		
3		
4		
5		

Consultant's Signature	Printed Name	Title	Date

NOTE: This requirement applies to the Consultant's firm as well as its principals. Principal is defined in the regulation (2 CFR 180.995) as follows:

- 1) An officer, director, owner, partner, principal investigator, or other person within a participant with management or supervisory responsibilities related to a covered transaction; or
- 2) A consultant or other person, whether or not employed by the participant or paid with Federal funds, who-
 - a) Is in a position to handle Federal funds;
 - b) Is in a position to influence or control the use of those funds; or,
 - c) Occupies a technical or professional position capable of substantially influencing the development or outcome of an activity require to perform the covered transaction.

The federal websites to verify eligibility include: <https://www.sam.gov/portal/public/SAM/> and http://portal.hud.gov/hudportal/HUD?src=/topics/limited_denials_of_participation.

SEATTLE HOUSING AUTHORITY

SUSPENSION AND DEBARMENT COMPLIANCE CERTIFICATE FOR SUB-CONSULTANTS

The Prime Consultant may use this form if the Prime can verify that their Sub-Consultants named below, nor any of their principals are debarred, suspended or ineligible from involvement by Federal, State or Local Government. If the Prime is unable to verify this information, the Prime must send the previous SUSPENSION AND DEBARMENT COMPLIANCE CERTIFICATE FOR CONSULTANT form to each sub- consultant to be completed and returned.

Prime Consultant's Name: _____ certifies that neither any of the sub- consulting firms named below, nor any of its principals are debarred, suspended or ineligible from involvement by Federal, State or Local Government. I understand that the Seattle Housing Authority (SHA) relies on this certification and I understand that I am obligated to submit the following to SHA:

- A certification for any new sub- consultant hired after submission of this certification.
- A renewal certification for every sub- consultant on the anniversary of the Contract execution date if the Contract Time extends beyond one year.

(Note: In lieu of this certification, the Prime Consultant may elect to submit a separate certification signed by each sub- consulting firm to SHA as evidence of sub- consultant eligibility. It is the Prime Consultant's responsibility to initiate, obtain, and provide all such individual sub- consultant certifications to SHA.)

Prime Consultant's Signature	Printed Name	Title	Date

Sub- Consultant Firm Listing: (If sub- consultants are not involved in the project, please enter **NONE.**)

If additional pages are necessary, copy this form to ensure signed statement precedes any listing of sub- consultants.

Please contact Sadia Ikram, Purchasing at sadia.ikram@seattlehousing.org if you have any questions regarding compliance with this requirement.
