

Amendment No. 2

SUBJECT: Request for Proposals for Housing Authority Management and Accounting Software issued May 11, 2026 and Amended June 2, 2026.

DATE: June 16, 2026

This Amendment No. 2 is issued to furnish information that is supplemental to, will clarify, or modify the above-referenced solicitation.

Commission’s Responses to Clarifying Questions.

Question #1.

“What software or system are you currently using for all of your financials?”

Response: The Housing Authority uses County Oracle’s Enterprise Financial System for most of its admin accounting. For Housing Authority HAP payments, we use MRI Housing Pro to process ACH and check payments; and monitor TARS (both owner and tenant debt.) For purposes of this RFP, we are seeking the ability to process ACH payments, check payments and monitor debts owed (both owner and tenants.)

Question #2.

“Do you have any public housing or tax credit units?”

Response: No

Question #3.

“Are we able to receive answers to our questions earlier than 6/2 or extend the deadline for response? If questions will be posted on 6/2 and the RFP is due 6/9, we are worried there won’t be enough time for our RFP response to be mailed, shipped and received at your office by 6/9.”

Response: Please refer to the revised schedule published in Amendment Number 1 issued on June 2, 2026.

Question #4.

“Do you need Fixed Assets Accounting?”

Response: No

Question #5.

“How many entities do you have?”

Response: No entities aside from the PHA

Question #6.

“RFP page 12. The Instructions for Submission of Response require an electronic copy to be uploaded to a website and a hard copy to be mailed. The electronic signature of the vendor’s authorized representative is binding on our company. Will SCHA consider removing the requirement for the hard copy and accept only the electronic file?”

Response: A hard copy is required. Please refer to Amendment #1 for updated schedule.

Question #7.

“RFP Page 12. If removing the requirement for a hard copy will not be considered, the vendor would like the maximum amount of time to provide our best response. Will SCHA consider allowing the electronic copy to be due by June 9, with the hard copy arriving a couple of days later?”

Response: A hard copy is required. Please refer to Amendment #1 for updated schedule.

Question #8.

“Scope of Services Section 1.2 Required Housing Applications: End-user reporting – Could you please clarify what you mean? Do you mean managing and reporting on the different subsidies, including TIC, 50058, and 50059? “

Response: The Housing Authority would like the ability to create ad-hoc reports in accordance with data needed in real time. Sample reports would include, but are not limited to: Waiting List reports, applicant status reports, financial reports, compliance reports (PIC, SEMAP Performance, HUD Submission reports, Fair Housing Complaints), Inspection Reports, Voucher Utilization reports, Voucher Success Rates, HAP Utilization, Budget Authority Utilization, Voucher expiration tracking, FSS, Fraud tracking, Lease-Up locations, etc.

Question #9.

“Scope of Services Section 1.3 Other Desired Features (not required): Automatically calculate midmonth rent increases with no need for multiple lock-ins during processing – Can you please provide an example of this?”

Response: We have properties that issue rent increases that start during the middle of the month. This requires a manual calculation of the old rent and the new rent based on the effective date of the rent increase. We are looking for automatic calculating of the mid-month rent increase when the Interim is processed.

Question #10.

“Housing Navigation/Supportive Service Module – What would you like to see in a module like this?”

Response: Housing Navigators often manage information that should remain separate from a participant’s primary case file due to privacy and confidentiality considerations. Ideally, the system would include a separate module with restricted access permissions so that only authorized users can create and view confidential service notes.

In addition, the Housing Authority would like the ability to track unit leads, property viewings, and property contacts within a Housing Navigation Module to improve efficiency, reduce duplicative work, and provide a centralized method for documenting housing search activities.

Potential functionality for a Housing Navigation Module could include:

- Restricted-access confidential case notes with role-based permissions*
- Unit lead tracking and status updates*
- Property viewing scheduling and documentation*
- Property owner/manager contact tracking*
- Follow-up reminders and task management*
- Search activity history and outcomes*
- Reporting tools to monitor housing search progress and trends*

Question #11.

“Scope of Services Section 2.4 Integrations and Interfaces: Electronic document management systems – Who are your current vendors that you need to integrate with? “

Response. The Housing Authority is seeking an easy to use document management system integrated within the software. Ideally, the system would be searchable. The Housing Authority’s

current software, MRI Housing Pro, utilizes iDEA embedded within the software. Separate from the existing software system, the Housing Authority has historical tenant documentation stored within OnBase. Integration with OnBase would be helpful but not required.

Question #12.

“Section 1.1 — VMS Reporting scope: (a) VMS Type tracking + operating reporting, (b) HUD eVMS-format submission file for portal upload, or (c) API auto-submission?”

Response: We are seeking VMS tracking and Operating Reporting, but are open to alternate submission methods. Ideally, the Housing Authority will be able to run reports directly from the software in accordance with HUD requirements. We do not want Auto-Submission.

Question #13.

“Section 1.1 — FSS Escrow Management scope: balance tracking per family, interest accrual, disbursement workflows, audit trails — which are essential? Are interim escrow workflows acceptable through go-live with native capability as a contracted roadmap deliverable?”

Response: FSS balance tracking per family, interest accrual and disbursement workflows are required at go-live and not an acceptable roadmap deliverable.

Question #14.

“Section 1.2 — FSS Program Management scope: which workflows are essential at go-live (Contract of Participation, ITSP tracking, coordinator dashboards, employment-income reporting, graduation/transition)? “

Response: All described FSS escrow management features are considered essential at go-live

Question #15.

“Current FSS enrollment count?”

Response: 51 enrolled FSS participants

Question #16.

“Section 1.2 — "Send and receive tenant and landlord text messages": would one-way outbound SMS at go-live + bidirectional as a contracted roadmap deliverable satisfy the requirement? Please enumerate the specific use cases (rent reminders, inspection scheduling, FSS outreach, etc.) and indicate outbound-only vs bidirectional for each.”

Response: Many assisted clients struggle to maintain access to email and do not have a stable mailing address. To ease the burden on clients and to minimize the number of phone calls

received, the Housing Authority is seeking an alternate means to communicate with clients. One-way SMS at go-live plus bidirectional as a deliverable will be acceptable. Specific uses may include, but are not limited to waitlist open notifications, recertification reminders, inspection reminders, documents missing reminders, missing payment reminders and general appointment reminders, responses to voicemails received.

Question #17.

“Section 1.2 — Online landlord access: minimum landlord-facing surface required at go-live (payment history, inspection status, document submission, direct deposit, work orders, unit-availability listing) — all simultaneously, or phased subset acceptable?”

Response: Required at go-live features include: Payment history, inspection status, document submission and direct deposit. We currently have an alternate web-based solution for unit listings and do not use work orders.

Question #18.

“Section 1.2 — 45+ waiting lists: current count actively administered? Continuously open or batched?”

Response: We currently have 45+ actively administered waitlists. No waitlists are currently open and they do not all open at the same time. When we open more than one waitlist simultaneously, applicants must be able to select which waitlists they are applying to

Question #19.

“Section 1.2 — SEMAP data capabilities: export underlying operational data, automated scorecard generation, or submission file?”

Response: The Housing Authority desires the ability to have the software randomly select files for SEMAP auditing.

Question #20.

“Section 1.2 — Legal and Collections Management: specific functionality required?”

Response: Required functionality at go-live include Tenant Accounts Receivable, Landlord Accounts Receivable, PHA Accounts Receivable (needed for logging debt's owed), ability to record payments within tenant and landlord files, printing invoices and generation of reports on outstanding debt.

Question #21.

“Section 7 — Confirming: SAML 2.0 federation with Sonoma County's Microsoft Entra ID, configured for the SCHA tenant during implementation, meets the SSO requirement. Or is OIDC/OAuth 2.0 specifically required (excluding SAML)?”

Response: OIDC/OAuth 2.0 is a requirement to support SAML

Question #22.

“Section 7 — 99.9% uptime: monthly or annual measurement? Scheduled maintenance excluded? Expected SLA credit remedies?”

Response: Scheduled maintenance should happen after regular business hours and will be excluded from the monthly up-time measurement. There are no expected SLA credits.

Question #23.

“Section 7 — Specific RTO/RPO targets required? Is RTO 4 hours / RPO 5 minutes acceptable?”

Question #24.

“Section 7 — Required minimum retention period for exportable audit logs?”

Response: 30 Days if auto-notification to designated users. 60 Days with no auto-notification.

Question #25.

“Section 3.3 — Confirming a vendor with no generative AI in current production code paths satisfies Sonoma County Admin Policy 9-6, with advance disclosure if AI features are added during contract term?”

Response: Any existing AI or generative AI developed post-contract, must comply with Sonoma County Admin Policy 9-6 and any updates thereto. There must be a mechanism for all AI features to be disabled by the Housing Authority/Commission.

Question #26.

“Section 2.3 — MRI Software PHA Housing Pro: hosted on-premises at SCHA, MRI-hosted, or third-party? “

Question #27.

“Current SCHA export capability, or vendor needs to engage MRI directly? Per-record export charges?”

Question #28.

“Section 2.3 — Please clarify IDIA: what system, what data?”

Response: iDIA (Integrated Document Imaging Archive) is Housing Pro’s fully integrated document management and electronic filing system. It allows housing agencies to scan, store, index, retrieve, and automatically route tenant, applicant, and owner documents directly within the Housing Pro database, reducing paper files and improving document accessibility, security, and audit compliance.

Question #29.

“Implementation Timetable — April 1, 2027 firm contractual go-live or target? Process for renegotiating in case of upstream delays (MRI cooperation, HUD readiness)?”

Response: Please see Amendment #1 for updated timeline. Any renegotiation of implementation timeline will be done in accordance with the terms worked out with the selected vendor at time of contract signing.

Question #30.

“Demo flexibility (most important): For the Required Software Demonstration, where a Required function is committed contractually for delivery before April 1, 2027 go-live but is not yet demoable in-system at the June 15–24 demo window, what is SCHA's preferred treatment: (a) score lower but not disqualify, (b) accept a design walkthrough plus committed delivery date in lieu of in-system functionality, (c) disqualify outright, or (d) something else?”

Response: Please see updated implementation schedule in Amendment #1. Any required functionality that is not yet available must be clearly identified within the proposal. Committed delivery dates for any required functionality that is not yet available must be included in the proposal. For purposes of demonstration, a design walk-through during the demonstration is acceptable. Required functionality that is in development, but not yet available for demonstration will not disqualify a proposer, but may result in a lower overall score.

Question #31.

“Attachment A — For Cyber Liability and Technology E&O at \$2M/\$2M, may cumulative limits across multiple in-force policies count, or must a single policy meet the limit?”

Response: Three interpretations of this question have been identified. Each interpretation is addressed and responded to below.

Interpretation 1. Whether Cyber Liability and Technology E&O limits can be combined to satisfy the \$2M/\$2M requirement, Example: \$1M Cyber Liability + \$1M Technology E&O = \$2M total.

Interpretation 1 Response: No. Cyber Liability and Technology E&O are separate coverage requirements. The vendor should demonstrate that it maintains both required coverages (whether through separate policies or a combined Cyber/Technology E&O policy) and that the applicable limits and coverage provisions meet the requirements of the RFP.

Interpretation 2. Whether multiple Cyber Liability policies can be combined to satisfy the \$2M requirement. Example: Cyber Policy #1 = \$750,000 and Cyber Policy #2 = \$1.25M.

Interpretation 2 Response. Yes, provided the combined policies meet or exceed the required limits and provide the required coverage. I would recommend obtaining copies of the applicable coverage information to confirm that the required coverage grants and limits are present.

Interpretation 3. Whether the required limits can be met through a combination of primary and excess coverage. Example: \$1M primary Cyber Liability policy + \$1M excess policy.

Interpretation 3 Response. Yes, provided the excess policy applies to the underlying Cyber Liability and/or Technology E&O coverage. We would want confirmation that the excess policy follows form or otherwise expressly provides excess coverage over the applicable Cyber Liability and/or Technology E&O policy. This is typically confirmed through the policy schedule and excess policy language or endorsements.

Question #32.

“Attachment B — Deadline for vendors to surface contract exceptions for SCHA review? Are exceptions raised in the proposal binding or subject to negotiation post-award?”

Response: Please refer to the initial RFP Section “Rules and Regulations, Form of Agreement” for the process on surfacing contract exceptions. Exceptions to the PSA terms are scored in the proposal. Therefore, we will not consider any exceptions to terms that are not identified in the proposal. Any exceptions to terms identified in the proposal are subject to negotiation prior to award.

Question #33.

“Section 4 — Evaluation Process: relative weights or scoring methodology applied to each evaluation factor (functional compliance, implementation methodology, data migration, technical security, vendor qualifications, training/support, cost, IT/security, HUD)?”

Response: Weighted scoring will be done in accordance with the categories identified within the RFP.

Question #34.

“Demo logistics — When will the demo script be provided? Same script for all vendors? Real-time screen sharing acceptable, or specific platform required (Zoom, Teams, Webex)?”

Response: Demonstration Structure will be provided at the time that the demonstration is scheduled and all vendors will be provided the same demonstration structure to follow. Separate demonstration blocks will be required for each functional area or module within the proposers system. It will be up to the proposer to ensure that required applications and any possible desired applications are addressed during the demonstration.

All demonstrations will be scheduled using Microsoft Teams with multiple Housing Authority employees viewing the demonstrations. If the proposer desires the demonstration using an alternative platform, this must be included in the proposer and multiple people must be able to access the demonstration from various locations.