

Business Proposal (Fully Managed Solution)



Response to Request for Proposals No. CDC16-067
RFP for Public Housing & Section 8 Programs' Administration Software Solution

Submitted July 5, 2016



Yardi Systems, Inc.
430 South Fairview Avenue
Santa Barbara, California 93117
www.yardi.com

PROPOSER'S QUESTIONNAIRE / AFFIDAVIT

Please complete, date and sign this form and place it as the first page of your proposal. The person signing the form must be authorized to sign on behalf of the Proposer and to bind the applicant in a Contract.

1. If your firm is a corporation, state its legal name (as found in your Articles of Incorporation) and State of incorporation:

<u>Yardi Systems, Inc.</u>	<u>CA</u>	<u>1984</u>
Name	State	Year Inc.

2. If your firm is a partnership or a sole proprietorship, state the name of the proprietor or managing partner:

Not applicable

3. If your firm is doing business under one or more DBA's, please list all DBA's and the County(s) of registration:

Name	County of Registration	Year became DBA
_____	_____	_____

4. Is your firm wholly or majority owned by, or a subsidiary of, another firm? No If yes,

Name of parent firm: Not applicable

State of incorporation or registration of parent firm: Not applicable

5. List any other names your firm has done business as within the last five (5) years.

Name	Year of Name Change
<u>Not applicable</u>	_____

6. Indicate if your firm is involved in any pending acquisition/merger, including the associated company name. If not applicable, so indicate below.

Not applicable

7. Will your firm be the sole contractor and assume complete responsibility for all work defined in the Statement of Work? Yes (Yes or No)

If no, list the Sub-Contractor(s) Not applicable

Proposer acknowledges and certifies that it meets and will comply with all of the Minimum Mandatory Requirements listed in Paragraph 1.4 - Minimum Mandatory Requirements, of this Request for Proposal, as listed below.

Check the boxes and fill in the blanks, as appropriate:

<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	Complies to have 10 years of experience, within the last 10 years, providing Public Housing and Section 8 software and services equivalent or similar to the services, tasks and deliverables identified in <i>Appendix B - Statement of Work for On Premise and Fully Managed Solutions</i> .
<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	Complies to have a Planning/Project Manager/Supervisor assigned to the Required Contract with 5 years of experience, within the last 10 years, providing software and services equivalent or similar to the services identified in <i>Appendix B - Statement of Work</i> .
<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	Complies with Data Encryption requirements
<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	Complies with RFP format requirements
<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	Complies to execute the Commission required contract
<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	Certifies intent to comply with Insurance Requirements
<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	Complies with the Child Support Compliance Program
<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	Declares intent to comply with Section 3 requirements
<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	Certifies intent to comply with the Safely Surrendered Baby Law
<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	Certifies intent to comply with the Jury Service Program
<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	Certifies intent to comply with Charitable Purposes Act
<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	Certifies intent to comply with the Defaulted Property Tax Reduction Program

Proposer further acknowledges that if any false, misleading, incomplete, or deceptively unresponsive statements in connection with this proposal are made, the proposal may be rejected. The evaluation and determination in this area shall be at the Executive Director's sole judgment and his/her judgment shall be final.

Proposer's Name: Yardi Systems, Inc.


Address: 430 South Fairview Avenue, Santa Barbara, CA 93117

E-mail address: Jeff.Bischoff@yardi.com

Telephone number: (800) 866-1144 ext. 1636 Fax number: (805) 699-2041

On behalf of Yardi Systems, Inc. (Proposer's name),

I, Arnold Brier (Name of Proposer's authorized representative), certify that the information contained in this Proposer's Questionnaire/Affidavit is true and correct to the best of my information and belief.


Signature

Vice President

Title

June 30, 2016

Date

77-0049051

IRS Employer Identification No.

C1315897

CA License No. (If applicable)

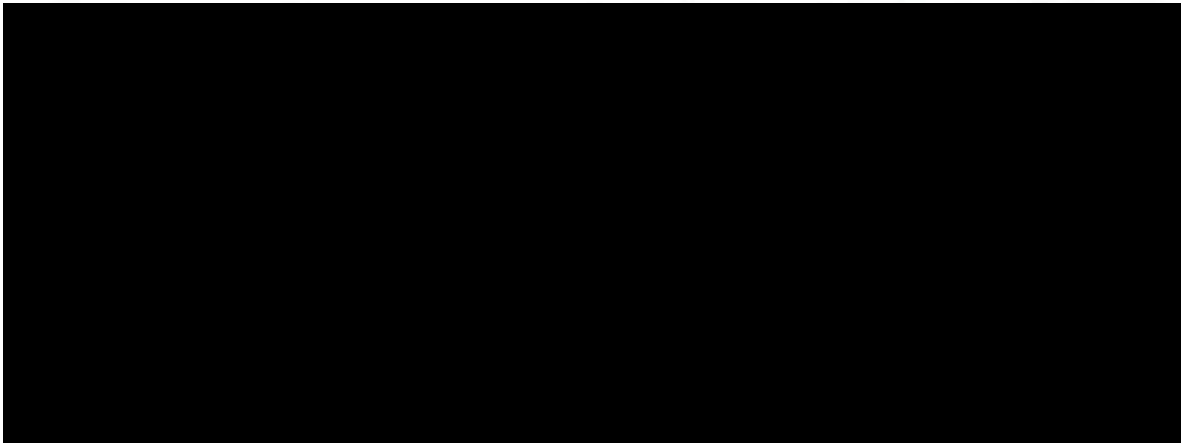


United States
Canada
Europe
Asia
Australia

June 30, 2016

Maryann Robles
Housing Authority of the County of Los Angeles
700 West Main Street
Alhambra, CA 91801

Dear Ms. Robles:



We have responded in good faith to the RFP based on our current understanding of your software and business requirements. We reserve the right to negotiate all terms and conditions of any eventual agreement between HACoLA and Yardi, if we are selected as the preferred vendor. Your dedicated contact during this process is:

Jeff Bischoff
Senior Account Executive, Public Housing
Jeff.Bischoff@yardi.com
(800) 866-1144 ext. 1636 | office
(805) 315-2852 | mobile

Thank you for the opportunity to present this proposal. We value our relationship with your agency and look forward to ensuring your smooth transition to the Yardi Cloud and Yardi Voyager 7S.

Sincerely,

A blue ink signature of Arnold Brier, consisting of a fluid, cursive-style name.

Arnold Brier
Vice President

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This document contains confidential and proprietary information and is intended solely for the entity and specific purpose for which it was made available and not for any other purpose. No part of this document may be disclosed to any third party without the prior written authorization of Yardi Systems, Inc. Yardi®, Yardi Systems, Inc., the Yardi Logo, and the names of Yardi products and services are trademarks or registered trademarks of Yardi Systems, Inc. in the United States and may be protected as trademarks in other countries. All other product, service, or company names mentioned in this document are claimed as trademarks and trade names by their respective companies.

Executive Summary

We recommend that the Housing Authority of the County of Los Angeles expand and improve on its existing Yardi Voyager® system by moving from on-premises hosting to the Yardi Cloud, then upgrading to Yardi Voyager 7S on your preferred schedule. Your agency will be able to take advantage of technological advances, increase efficiency, and save substantial costs and effort compared to implementing an unfamiliar system. Your team can serve program participants quickly and consistently with mobile inspections and work orders, fast and reliable adjustments for new compliance requirements, and optional self-service portals. Our dedicated Public Housing team has the necessary project experience and toolsets to ensure a smooth upgrade process for HACoLA.

Section A. Executive Summary

Our platform will enable HACoLA to adapt to HUD and technical changes without costly and time-consuming customization and without the costs and risks of a new system rollout. Factors that make Yardi Voyager the best future platform for your agency's unique needs include:

- » **Proven HACoLA Platform.** Implementing a new compliance platform is a lengthy, costly, and disruptive process. Because your team is already familiar with interface conventions and functions in Yardi Voyager, you will not need to make time and allocate funds for training and implementation. Your team can focus on their important work without interruption.
- » **Mobile-Ready.** Yardi Voyager 7S is browser-independent and works on any mobile device. Your team members can assist program participants, conduct inspections, and access up-to-the-minute information no matter where they are.
- » **Flexibility.** Our software offers extensive configuration options and functional flexibility.
- » **Fully Managed Solution.** We deliver Yardi Voyager® as a Software as a Service (SaaS) subscription in the Yardi Cloud, supported by a dedicated, in-house Yardi team. This includes:
 - › **Security and Redundancy.** Building the included security and disaster recovery features in house would be cost-prohibitive even for an agency of HACoLA's size.
 - › **24-Hour Support.** Round-the-clock support and monitoring prevents outages.
 - › **Hardware Maintenance.** We maintain and upgrade servers for optimal performance.

A.1. Overview of Proposed Plan

Based on our understanding of HACoLA's needs, we propose the Yardi Voyager product suite to support your future growth and enable efficient support for your program participants. Please see [Section C.3. System Design](#) for details about these products. We propose moving HACoLA's current Yardi Voyager platform into the Yardi Cloud, then upgrading you to the latest version, Yardi Voyager 7S. Key benefits for your agency include easier usability and mobile access, additional self-service options for program participants, and enhanced reporting and performance. The proposed approach eliminates the need for a lengthy, costly, and risky implementation project, data conversion, or extensive user training. We look forward to continuing our successful collaboration and assisting HACoLA in simplifying processes, serving program participants better, and meeting applicable HUD mandates.

A.2. Required Attestations

Below are the attestations and documentation requested in the RFP:

Proposer's Name(s)

This proposal is being submitted by Yardi Systems, Inc. as a sole contractor. Our vendor ID in the County's WebVen is XXXXXXXXXX



United States
Canada
Europe
Asia
Australia

Proposer's Contact

Your Yardi contact for all matters relating to this RFP is:

Jeff Bischoff, Senior Account Executive, Public Housing
430 South Fairview Avenue
Santa Barbara, California 93117
Jeff.Bischoff@yardi.com
(800) 866-1144 ext. 1636 | office
(805) 315-2852 | mobile
(805) 699-2041 | fax

Subcontractors

Yardi is qualified and staffed to perform and complete all work described in Appendix A (Required Contract) of the RFP and all of the Attachments thereto as a single contractor. We do not propose any subcontractors.

Office Name and Location

HACoLA will receive upgrade and ongoing support services from Yardi's nearby head office in Santa Barbara, California, which also coordinates and substantially performs our software development. This nearby location will enable responsive service with access to Yardi's senior management for strategic input and direction. In addition, Yardi's Public Housing staff at this office has built working relationships with many HACoLA team members while supporting your operations on Yardi Voyager since 2007.

Proposer's Company Structure and Organization

Founded by Anant Yardi in California in 1982, our company is now in its fourth decade developing and supporting technology for the real estate industry. We remain privately held under Mr. Yardi's management, with 5,000 employees worldwide and 20 regional offices in North America. Our clients manage more than 10 million residential units, including 1 million subsidized units, and 10 billion square feet of commercial space on our software.

Yardi is a stable company that has grown by 15% to 20% per year over the last decade. Our clients can leverage several wholly owned subsidiaries' capabilities and expertise seamlessly in Yardi Voyager to gain comprehensive compliance management and resident services with end-to-end reporting and oversight. Relevant examples for this project include:

- █ [Redacted]
- █ [Redacted]
- █ [Redacted]

Goods and/or Services Provided

Yardi is the largest provider of real estate management software in North America today, with more than 15,000 client organizations of all sizes. Our browser-based accounting, compliance, and property management solution for Public Housing Authorities, Yardi Voyager PHA, has met all HUD project-based accounting, management, and budgeting requirements since 2001.

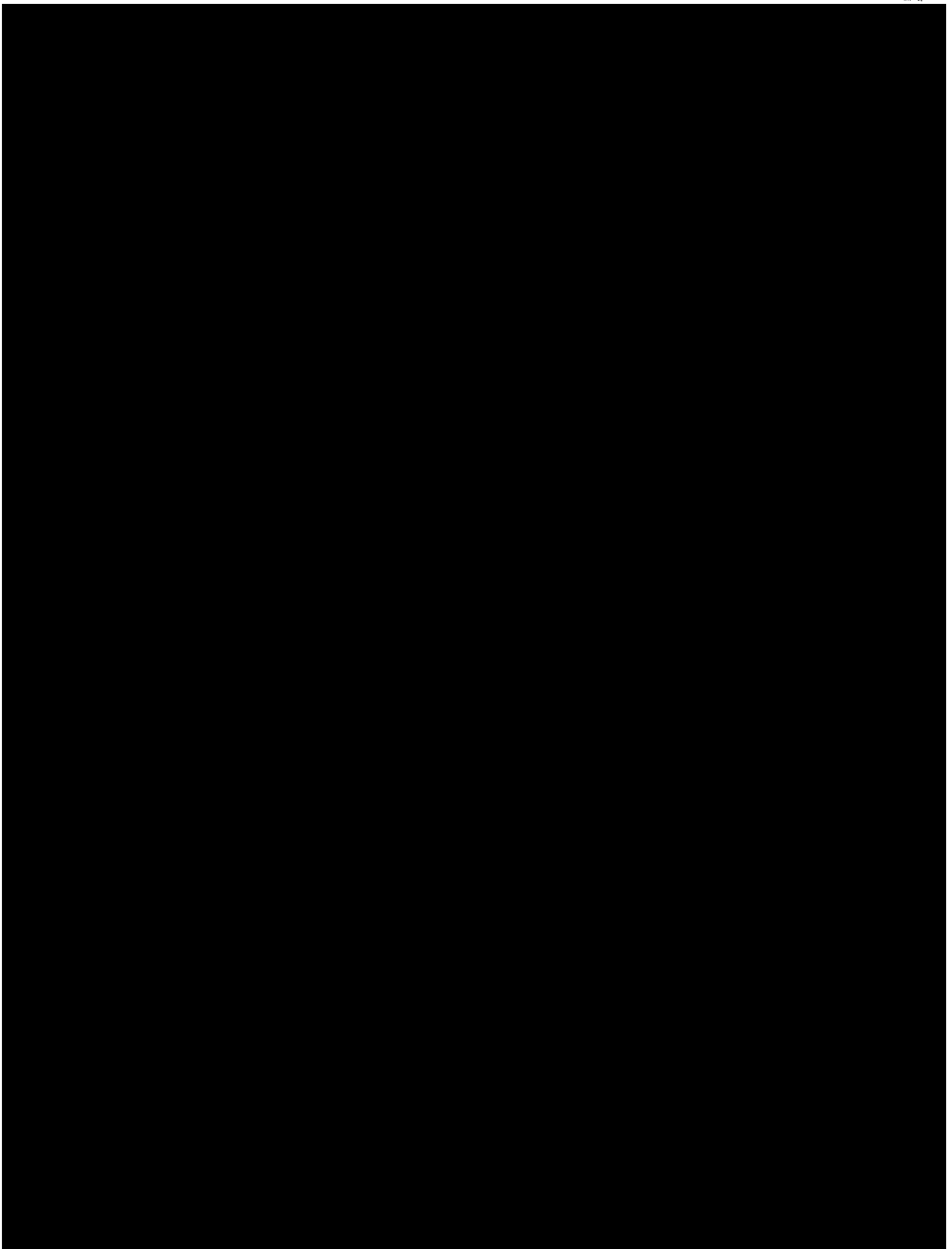
Acknowledgements

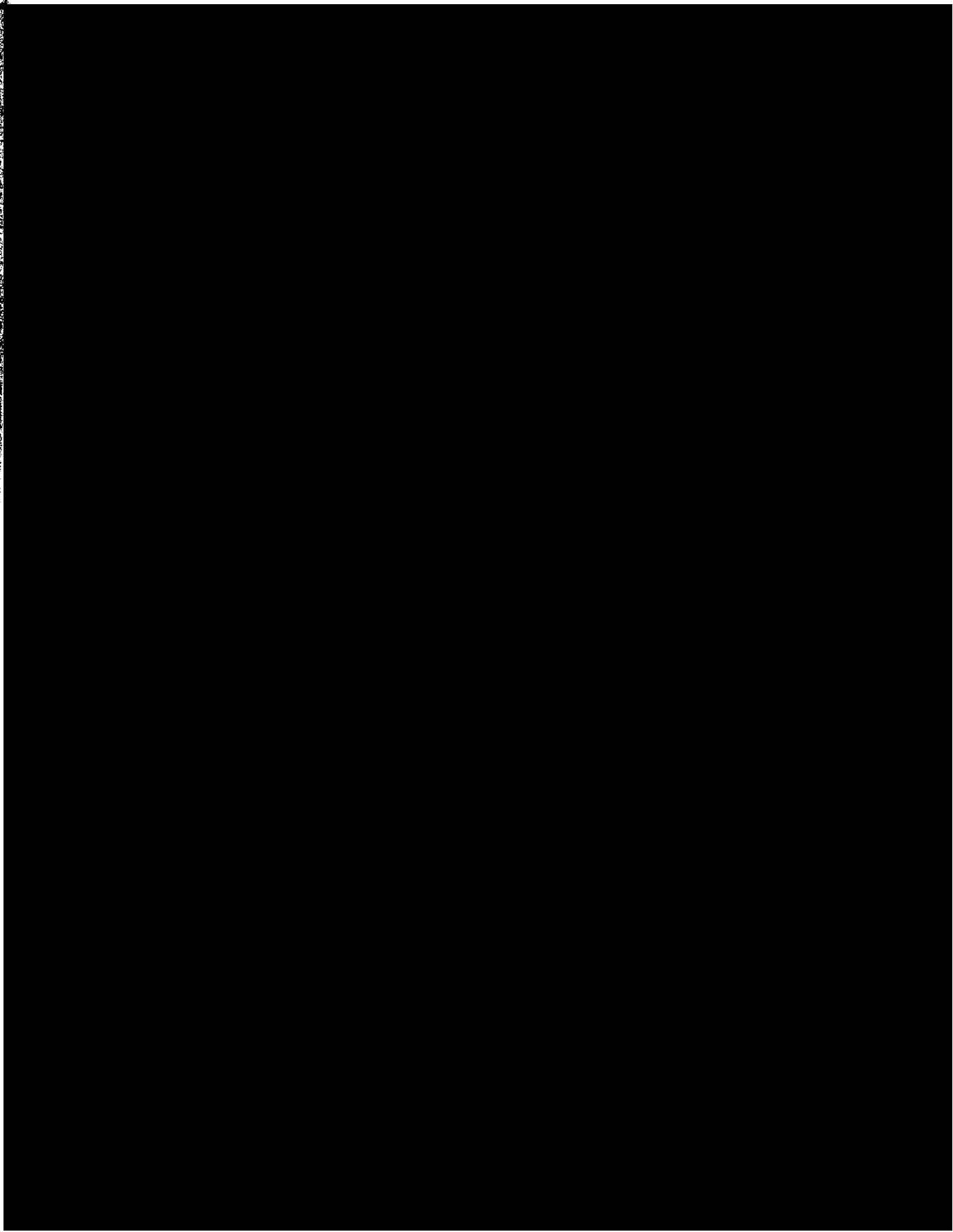
Please see **Section F. Acceptance of Terms and Conditions in Required Contract and Requirements of the Statement of Work (SOW; Confidential)** for comments regarding HACoLA's proposed contract language.

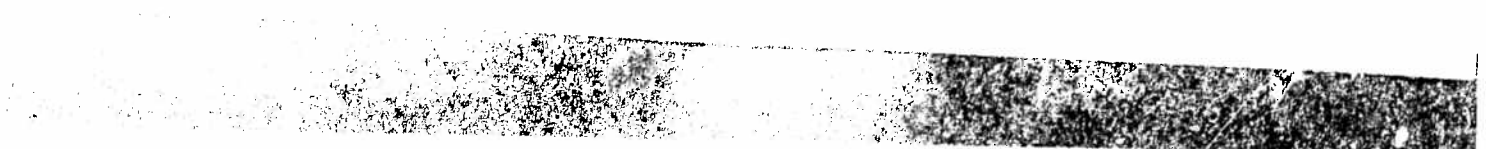
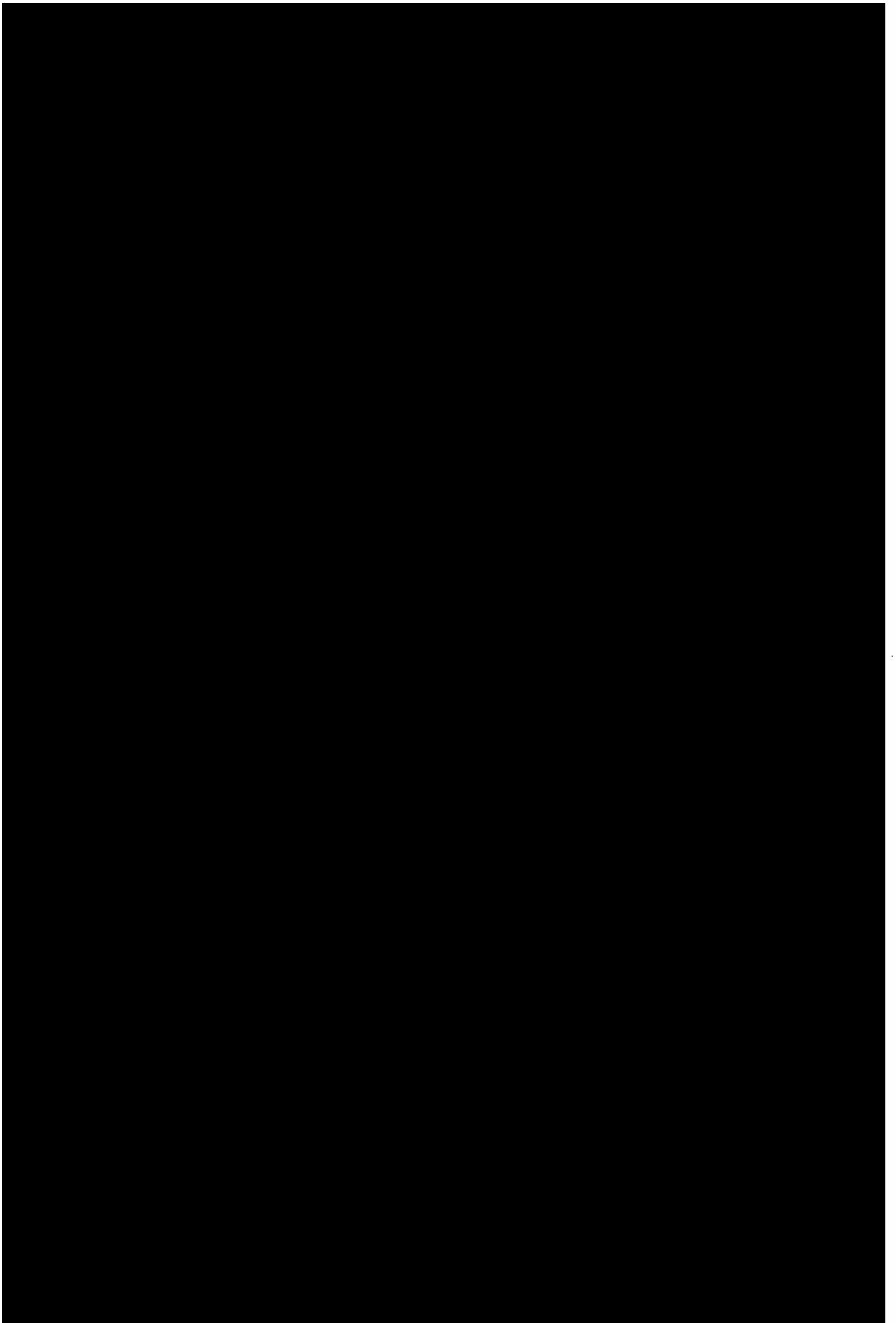
- » Yardi is aware of the Conflict of Interest language in the RFP's Appendix A – Required Contract.
- » Yardi has thoroughly reviewed Appendix A – Required Contract of this RFP. If selected as a result of this RFP process, we acknowledge that we will be required to sign an agreement substantially similar to the one set forth in Appendix A – Required Contract of this RFP. We acknowledge that the required agreement set forth in Exhibit A of this RFP is subject to change by the County, whereby some provisions may be deleted and others may be added to form the resultant agreement.
- » Yardi will bear sole and complete responsibility for all work as defined in Appendix B – Statement of Work for a Fully Managed Solution. We do not propose an on-premises option.
- » Yardi is willing and able to comply with the Indemnification, Insurance, and Bond requirements set forth in Appendix A – Required Contract.
- » Yardi is willing and able to comply with HACoLA's entire RFP and Appendix A (Required Contract) requirements including, but not limited to, County's Jury Service Ordinance, County's Child Support Compliance, and willingness to consider Section 3 participants.
- » Yardi agrees to allow HACoLA to audit our qualifications to perform the required services.
- » Yardi agrees to provide HACoLA, as requested, any and all information the Housing Authority's determines necessary for an accurate determination of the Proposer's qualifications.

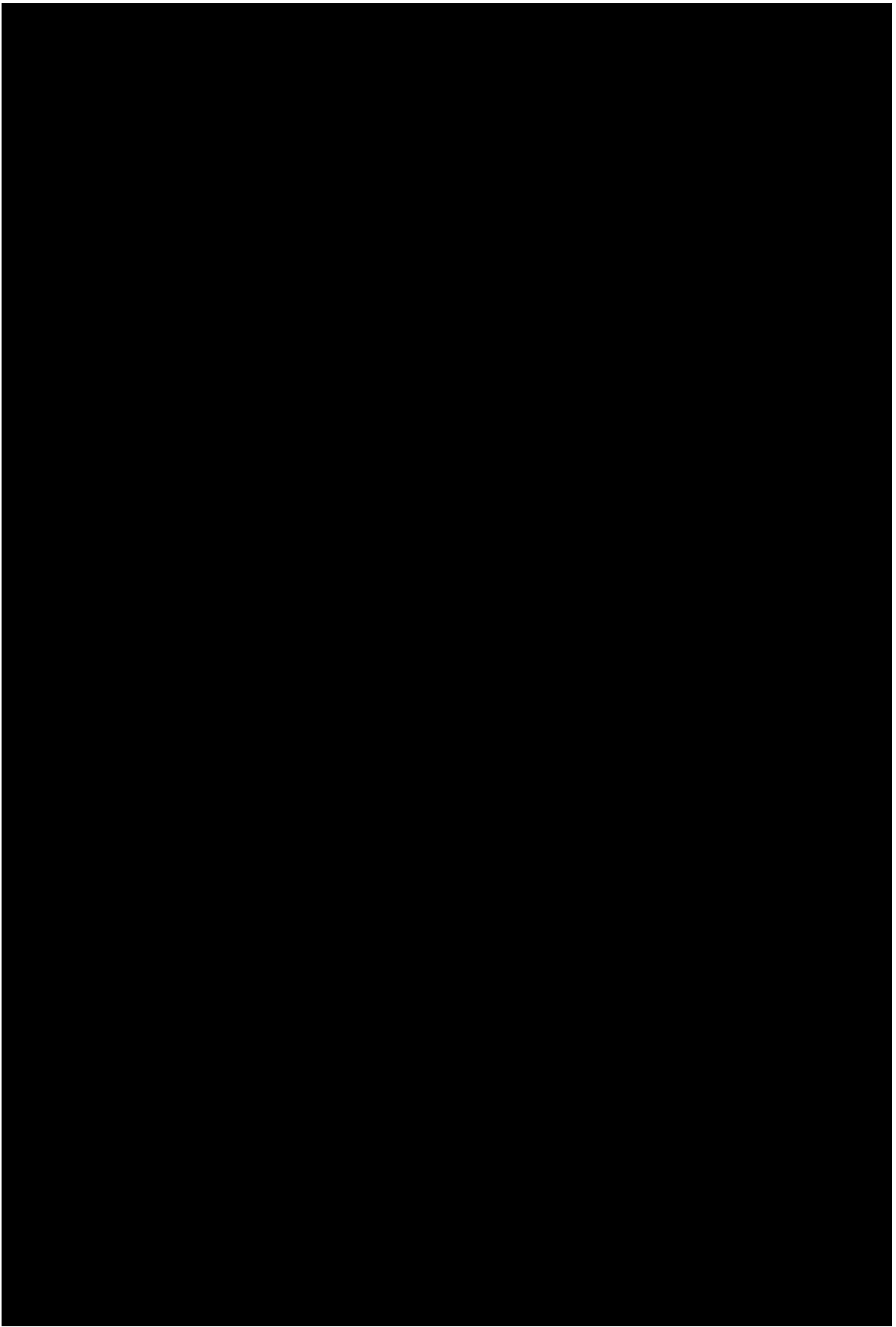
A.3. Required Documentation (Confidential)

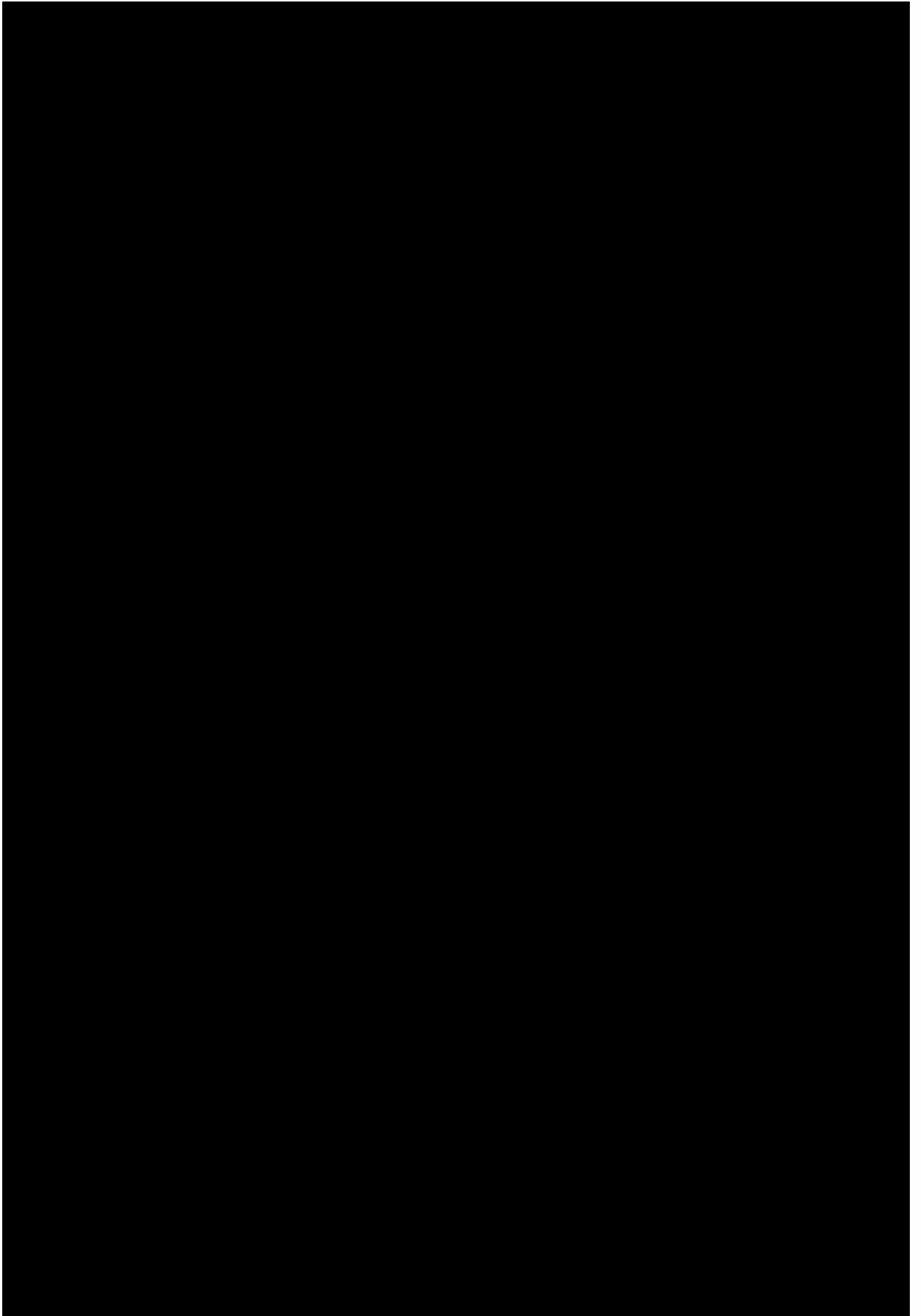
On the following pages, we include copies of current articles of incorporation, our business license, and permits as applicable. We have not made any fictitious business name filings. We request that HACoLA treat this information as confidential under the Public Records Act as permitted under paragraph 1.14 of the RFP.

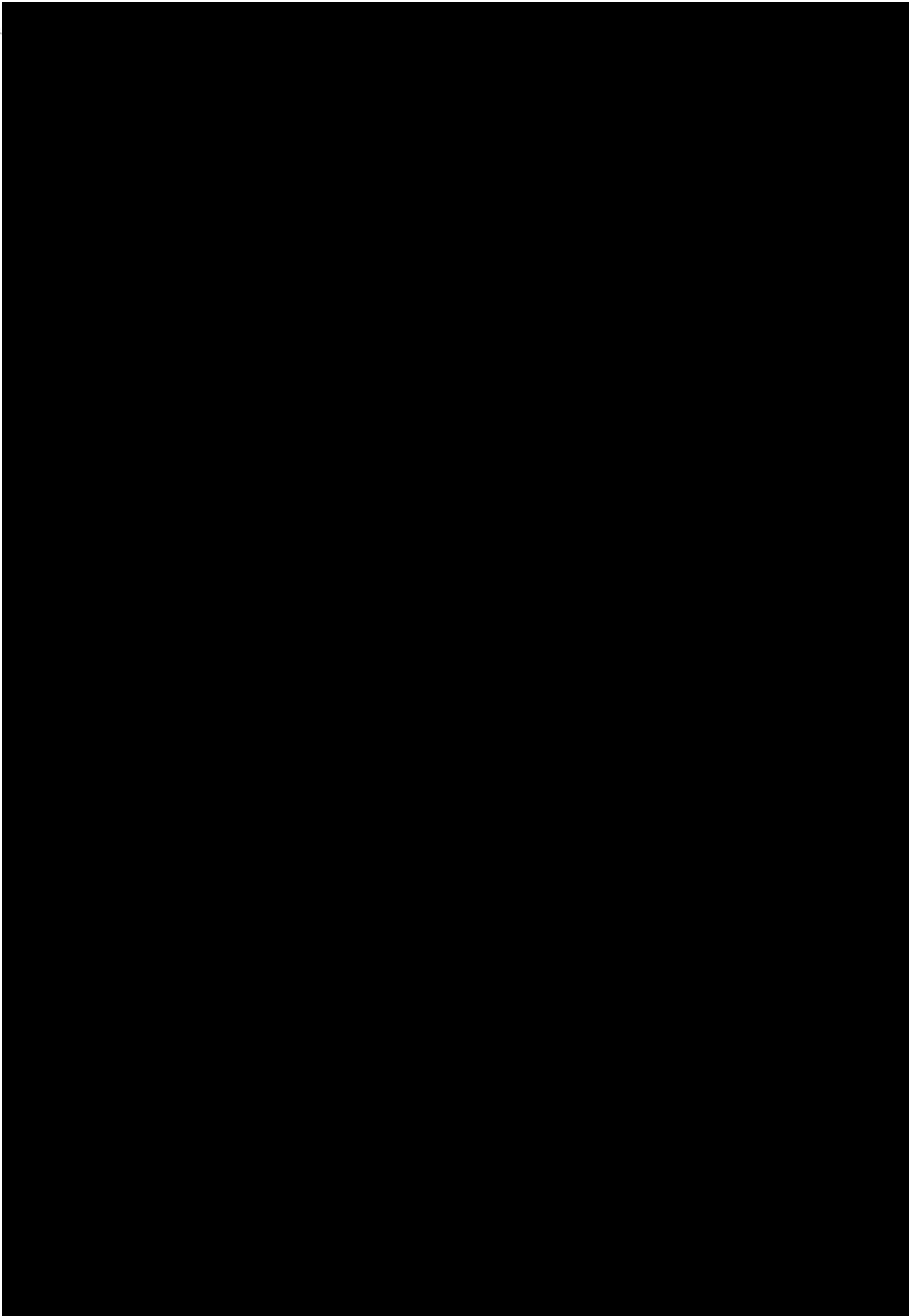


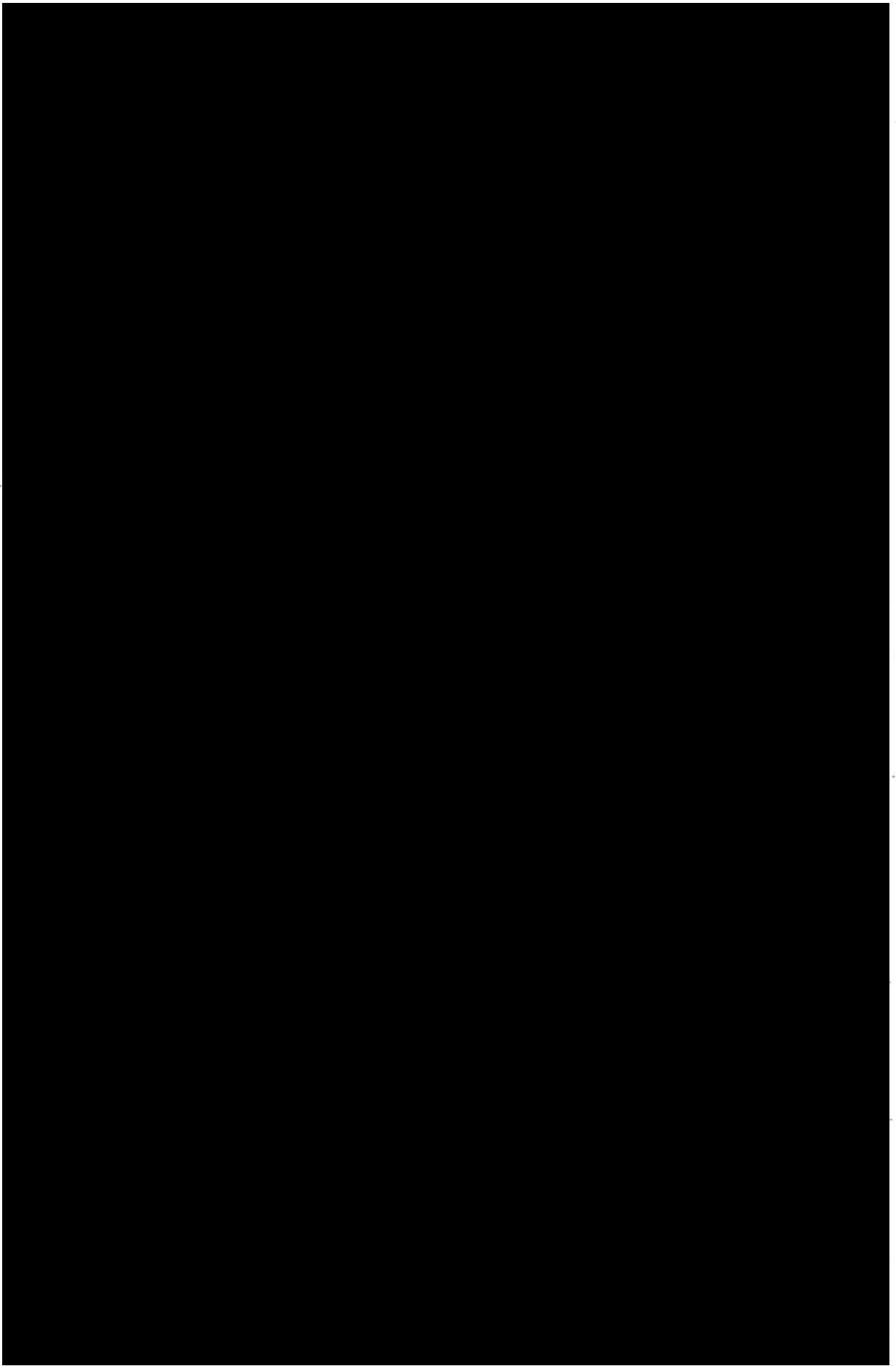


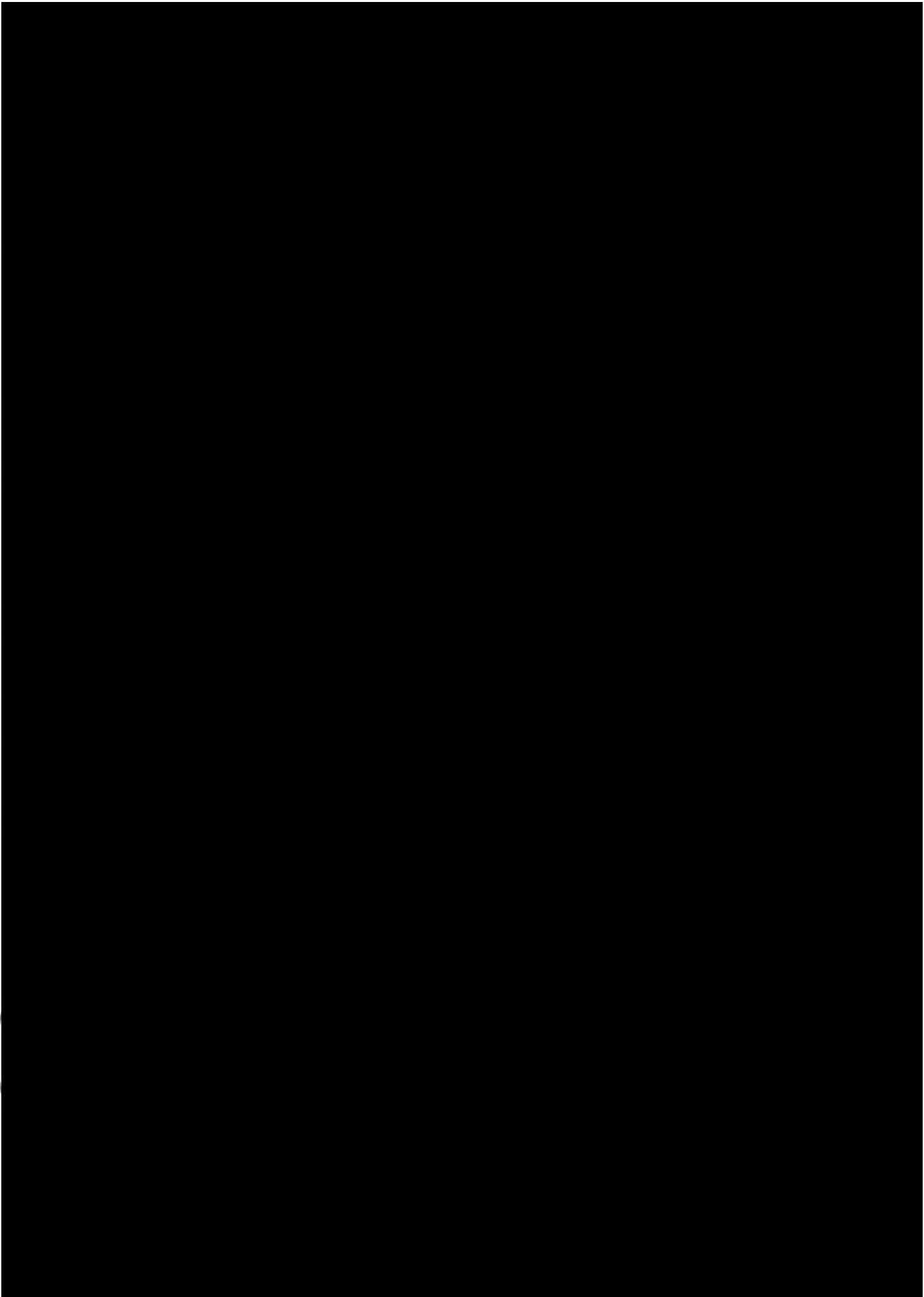












Proposer's Qualifications

Yardi has been committed to the housing industry for more than 30 years and currently supports more than 190 agencies on the Yardi Voyager® PHA platform, including leading national PHAs like Chicago HA, Atlanta HA, Oakland HA, and Dallas HA. HACoLA itself has been managing its housing portfolio successfully on our software since 2007.

On the following pages, we demonstrate that our company meets HACoLA's minimum requirements related to background (training, certification, licensure, etc.) and work experience stated in Sub-Paragraph 1.4 of the RFP. We also show that Yardi has the capability to perform the required services as a corporation, as specified in Appendix B – Statement of Work in the RFP.

Section B. Proposer’s Qualifications (Confidential)

Below we address each of the Proposer’s Mandatory Minimum Requirements identified in Section 1.4 of the RFP. The following pages contain extensive additional detail about our qualifications, team members, and references. We request that HACoLA treat the information in this section as confidential under the Public Records Act as permitted under paragraph 1.14 of the RFP.

#	Mandatory Minimum Requirement	Met?	Comments
1.4.1	The Proposer must have 10 years of experience, within the last 10 years, providing Public Housing and Section 8 software and services equivalent or similar to the services, tasks and deliverables identified in Appendix B - Statement of Work for On Premise and Fully Managed Solutions.	✓	[REDACTED]
1.4.2	The Proposer must have a Planning/Project Manager/Supervisor assigned to the Required Contract with 5 years of experience, within the last 10 years, providing software and services equivalent or similar to the services identified in Appendix B - Statement of Work.	✓	[REDACTED]
1.4.3	The Proposer must comply with Data Encryption requirements (Reference Section 8.64 in the Appendix A – Required Contract).	✓	Yardi Voyager meets or exceeds the encryption standards mentioned in Section 8.64 of Appendix A in the RFP.
1.4.4	The Proposer must comply with the RFP format and requirements set forth in the Proposal Submission Requirements, Section 2.0, of this RFP when submitting his/her proposal.	✓	This proposal addresses the questions and requests in the RFP and follows the format identified in Section 2.0 of the RFP.
1.4.5	The Proposer must agree to the terms and conditions of the Required Contract, if awarded a contract, of which in substantial finished form is included in this package in Appendix A - Required Contract.	✓	[REDACTED] We respond to the terms identified in Appendix A of the RFP in detail in Section F. Acceptance of Terms and Conditions in Required Contract and Requirements of the Statement of Work (SOW).

#	Mandatory Minimum Requirement	Met?	Comments
1.4.6	The Proposer must acknowledge intent to comply with the Housing Authority insurance requirements (Reference Sub-paragraph 1.15 in this Section).	✓	Yardi intends to comply with HACoLA's insurance requirements identified in the RFP.
1.4.7	The Proposer must comply with the Child Support Compliance Program (Reference Sub-paragraph 1.21 in this Section).	✓	Please see Section H. Business Proposal Required Forms for a certification of our intent to comply.
1.4.8	The Proposer must be a qualified Section 3 Business Concern or declare an intent to comply with Section 3 requirements in order to be a responsive bidder eligible for contract award (Reference Subparagraph 1.25 of this Section).	✓	We certify our intent to comply in Section G. HUD Section 3 Compliance .
1.4.9	The Proposer must certify intent to comply with the Safely Surrendered Baby Law Program. (Reference Sub-paragraph 1.28 in this Section)	✓	Please see Section H. Business Proposal Required Forms for a certification of our intent to comply.
1.4.10	The Proposer must certify intent to comply with the Jury Service Program (Reference Sub-paragraph 1.29 in this Section).	✓	Please see Section H. Business Proposal Required Forms for a certification of our intent to comply.
1.4.11	The Proposer must certify intent to comply with the Charitable Purposes Act. (Reference Sub-paragraph 1.31 in this Section)	✓	Please see Section H. Business Proposal Required Forms for a certification of our intent to comply.
1.4.12	The Proposer must certify intent to comply with the Defaulted Property Tax Program. (Reference Sub-paragraph 1.33 in this Section)	✓	Please see Section H. Business Proposal Required Forms for a certification of our intent to comply.

B.1. Proposer's Background and Experience

B.1.1. Proposer's Team

- (1) **Information on the experience and background of the professional staff that will be assigned to this project. The description must include direct experience related to the requirements in Appendix B – Statement of Work.**

[Redacted content]

[Redacted text]

- (2) In-depth resumes of each member of the Proposer’s team (including consultants such as managers, project manager, developers, legal counsel, finance, etc.) and describe each member’s job classification, professional experience, education and credentials, relevant project experience, accomplishments relative to this Project, and describe their role for this project.

[Redacted text]

[Redacted text]

[Redacted text]

[Redacted text]

[Redacted text]

[Redacted text]

[Redacted text]

[Redacted text]

[Redacted text]

[Redacted text]

[Redacted text]

[Redacted text]

[Redacted text]

[Redacted text]

- (3) Proposer to identify project manager and provide project examples of project manager's work history with Proposer team.

[Redacted text]

[Redacted text block]

- (4) An organization chart and list the number of staff persons, by job classification, who will be involved in the administration and implementation of the contract.

[Redacted text block]

[Redacted text block]

B.2. Proposer's References

B.2.1. Prospective Contractor References

The following is contact information for six agencies for whom we have provided a similar or identical scope of work to that proposed for HACoLA. We present these in the format requested in Appendix C of the RFP. We include agency size information, but cannot provide contract amounts due to confidentiality agreements with our clients.

PROSPECTIVE CONTRACTOR LIST OF REFERENCES

Contractor's Name: Yardi Systems, Inc.

List five (5) References where the same or similar scope of services were provided in order to meet the Minimum Requirements stated in this solicitation. **It is the Contractor's responsibility to ensure that the firm's name, contact's first and last names, title, phone/fax numbers and email address for each reference listed below are complete. Your failure to provide complete and accurate information may result in the disqualification of the incomplete listed reference.**

1. Name of Firm	Address of Firm	Contact Person	Phone #	Fax #
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
Name of Contract	# of Years / Term of Contract	Type of Service	Dollar Amount	Email Address
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
2. Name of Firm	Address of Firm	Contact Person	Phone #	Fax #
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
Name of Contract	# of Years / Term of Contract	Type of Service	Dollar Amount	Email Address
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
3. Name of Firm	Address of Firm	Contact Person	Phone #	Fax #
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
Name of Contract	# of Years / Term of Contract	Type of Service	Dollar Amount	Email Address
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

4. Name of Firm	Address of Firm	Contact Person	Phone #	Fax #
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
Name of Contract	# of Years / Term of Contract	Type of Service	Dollar Amount	Email Address
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
		[REDACTED]		
		[REDACTED]		
		[REDACTED]		
5. Name of Firm	Address of Firm	Contact Person	Phone #	Fax #
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
Name of Contract	# of Years / Term of Contract	Type of Service	Dollar Amount	Email Address
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
		[REDACTED]		
		[REDACTED]		
		[REDACTED]		
6. Name of Firm	Address of Firm	Contact Person	Phone #	Fax #
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
Name of Contract	# of Years / Term of Contract	Type of Service	Dollar Amount	Email Address
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
		[REDACTED]		
		[REDACTED]		

B.2.2. Prospective Contractor List of Contracts

We currently support more than 190 Public Housing Authorities on Yardi Voyager, as well as over 100 agencies on legacy platforms and over 100 other government entities at the city, county, state, and federal levels. Please note that due to the size of our client base, it would be impractical to include detailed contact and contract information for all of our clients. In the interest of relevance, we provide a summary listing of just PHAs using Yardi Voyager here. Please see [Section B.2.1. Prospective Contractor References](#) for detailed information on several of our PHA clients with similar business needs as HACoLA. We are happy to provide additional references upon request.

Yardi Voyager Public Housing Authority Clients

Alabama	<ul style="list-style-type: none"> » Bessemer Housing Authority » Montgomery City Housing Authority
Alaska	<ul style="list-style-type: none"> » Alaska Housing Finance Corporation » Cook Inlet Housing Authority
Arizona	<ul style="list-style-type: none"> » Chandler Housing and Redevelopment » Tucson Community Services (Section 8)
Arkansas	<ul style="list-style-type: none"> » Fort Smith Housing Authority » North Little Rock Housing Authority » White River Regional Housing Authority
California	<ul style="list-style-type: none"> » Alameda City Housing Authority » Calexico Housing Authority » Contra Costa County Housing Authority » Eureka City/Humboldt County Housing Authority » Fresno Housing Authority » Kern County Housing Authority » City of Los Angeles Housing Authority » County of Los Angeles Housing Authority » Mendocino County Housing Authority » Merced County Housing Authority » Monterey County Housing Authority » Oakland Housing Authority » Oxnard Housing Authority » Port Hueneme Housing Authority » Richmond Housing Authority » Sacramento Housing and Redevelopment Authority » San Buenaventura Housing Authority » San Diego Housing Commission » San Joaquin County Housing Authority » San Luis Obispo Housing Authority » San Mateo County Department of Housing » Santa Ana Housing Authority (Section 8) » Santa Barbara County Housing Authority

Yardi Voyager Public Housing Authority Clients

- » Santa Clara County Housing Authority
- » Stanislaus County Housing Authority
- » Sutter and Nevada Counties Regional Housing Authority
- » Ventura County Area Housing Authority

Colorado

- » Adams County Housing Authority
- » Aspen/Pitkin County Housing Authority
- » Aurora Housing Authority
- » Boulder Housing Partners
- » Brighton Housing Authority
- » Colorado Housing and Finance Authority
- » Englewood Housing Authority
- » Fort Collins Housing Authority
- » Littleton Housing Authority
- » Metro West Housing Solutions (formerly Lakewood Housing Authority)

Connecticut

- » Milford Public Housing Authority
- » Park City Communities (Bridgeport Housing Authority)
- » Waterbury Housing Authority

DC

- » Community Connections

Florida

- » Clearwater Housing Authority
- » Fort Lauderdale City Housing Authority
- » Jacksonville Housing Authority
- » Lakeland City Housing Authority
- » Manatee County Housing Authority
- » Seminole Tribe of Florida
- » Tampa Housing Authority

Georgia

- » Athens Housing Authority
- » Atlanta Housing Authority
- » Columbus Housing Authority
- » Dekalb County Housing Authority
- » HJ Russell
- » IMS Management Services
- » LaGrange Housing Authority
- » Macon Housing Authority
- » Marietta City Housing Authority
- » Union Point Housing Authority

Illinois

- » Chicago Housing Authority
- » Cook County Housing Authority
- » DuPage County Housing Authority
- » East Lake Management Group
- » Illinois Housing Development Authority
- » Kankakee County Housing Authority

Yardi Voyager Public Housing Authority Clients

- » Macoupin County Housing Authority
- » Madison County Housing Authority
- » Montgomery County Housing Authority

Indiana

- » Anderson Housing Authority
- » Evansville Housing Authority
- » Fort Wayne Housing Authority
- » Gary Housing Authority
- » Marion Housing Authority
- » Mishawaka Housing Authority
- » Peru Housing Authority

Kentucky

- » Bowling Green Community Development Department
- » Kentucky Housing Corporation
- » Paducah Housing Authority

Louisiana

- » Houma Terrebonne Housing Authority
- » Louisiana Housing Corporation
- » Terrebonne Council on Aging

Maryland

- » Baltimore Regional Housing Partnership
- » Howard County Housing and Community Development
- » Montgomery County Housing Opportunity Commission

Massachusetts

- » Corcoran Management
- » Winn Management

Michigan

- » Ann Arbor Housing Commission
- » Detroit Housing Commission

Minnesota

- » Bemidji Housing and Redevelopment Authority
- » Carver County Housing and Redevelopment Authority
- » Crookston Housing and Economic Development Authority
- » Willmar Housing and Redevelopment Authority

Missouri

- » McCormack, Baron, Ragan Management Service
- » North East Community Action Corporation
- » St. Louis County Housing Authority

Montana

- » Butte Public Housing Authority
- » Great Falls Housing Authority
- » Helena Housing Authority
- » Missoula Housing Authority

Nebraska

- » Bellevue Housing Authority
- » Douglas County Housing Authority
- » Omaha City Housing Authority

Yardi Voyager Public Housing Authority Clients

Nevada	<ul style="list-style-type: none"> » Nevada Rural Housing Authority » Southern Nevada Regional Housing Authority
New Jersey	<ul style="list-style-type: none"> » Bergen County Housing Authority » Bloomfield Township » Bridgeton Housing Authority » Millville Housing Authority » Montclair Housing Authority » Vineland Housing Authority
New Mexico	<ul style="list-style-type: none"> » Santa Fe County Housing Authority
New York	<ul style="list-style-type: none"> » Beacon Housing Authority » Buffalo Municipal Housing Authority » Long Beach Housing Authority » Oneida Housing Authority » Peekskill Housing Authority » Tupper Lake Housing Authority
North Carolina	<ul style="list-style-type: none"> » Asheville City Housing Authority » Charlotte Housing Authority » Greensboro Housing Authority
North Dakota	<ul style="list-style-type: none"> » Burleigh County Housing Authority » Fargo Housing and Redevelopment Authority » Grand Forks Housing Authority
Ohio	<ul style="list-style-type: none"> » Athens Metropolitan Housing Authority » Cambridge Metropolitan Housing Authority » Hocking Metropolitan Housing Authority » Portage Metropolitan Housing Authority » Springfield Metropolitan Housing Authority » Stark Metropolitan Housing Authority » Wayne Metropolitan Housing Authority
Oregon	<ul style="list-style-type: none"> » Home Forward (Housing Authority of Portland) » Housing Works » Mid-Columbia Housing Authority » Northwest Oregon Housing Authority » Washington County Housing Authority » West Valley Housing Authority » Yamhill County Housing Authority
Pennsylvania	<ul style="list-style-type: none"> » Beacon Communities, LLC (manages PHA units for Pittsburgh, PA) » Bedford County Housing Authority » Delaware County Housing Authority » Northampton County Housing Authority » Pennrose Management

Yardi Voyager Public Housing Authority Clients

South Carolina	<ul style="list-style-type: none"> » South Carolina State Housing Finance and Development Authority » Spartanburg Housing Authority
South Dakota	<ul style="list-style-type: none"> » Pennington County Housing and Redevelopment
Tennessee	<ul style="list-style-type: none"> » East Tennessee Human Resources Agency » Gallatin Housing Authority » Metropolitan Development and Housing Agency (Nashville)
Texas	<ul style="list-style-type: none"> » Big Spring Housing Authority » Brownsville Housing Authority » Corpus Christi Housing Authority » Dallas Housing Authority » El Paso Housing Authority/Acquisition Corporation » Lamesa Housing Program
Utah	<ul style="list-style-type: none"> » Salt Lake City Housing Authority
Virginia	<ul style="list-style-type: none"> » Charlottesville RHA » Fairfax County RHA » Franklin RHA » Richmond RHA
Washington	<ul style="list-style-type: none"> » Bellingham and Whatcom County HAs » Bremerton City Housing Authority » Everett Housing Authority » Grant County Housing Authority » Kitsap County Consolidated Housing Authority » Okanogan County Housing Authority » Peninsula Housing Authority (formerly Clallam County Housing Authority) » Seattle Housing Authority » Walla Walla Housing Authority » Wenatchee Housing Authority
West Virginia	<ul style="list-style-type: none"> » Bluefield City Housing Authority
Wisconsin	<ul style="list-style-type: none"> » Milwaukee County Housing and Community Development » Wausau Housing Authority
United States Territories & Others	<ul style="list-style-type: none"> » Puerto Rico Public Housing Administration » Trinidad & Tobago National Housing Development Corporation

B.2.3. Prospective Contractor List of Terminated Contracts

Yardi enjoys client retention of approximately 99% per year. Clients only occasionally choose to discontinue their relationship with Yardi, usually for internal reasons such as mergers, acquisitions, or business focus changes. A number of organizations have been Yardi clients since the mid-1980s. Due to mutual confidentiality provisions in our contracts with our clients, we are not authorized to disclose details on specific former clients. We invite the HACoLA team to discuss our service performance with

the clients listed in **Section B.2.1 Prospective Contractor's References**, with clients attending our Public Housing and Affordable Housing forums and general user conferences (YASC), and with participants in our PHA user group.

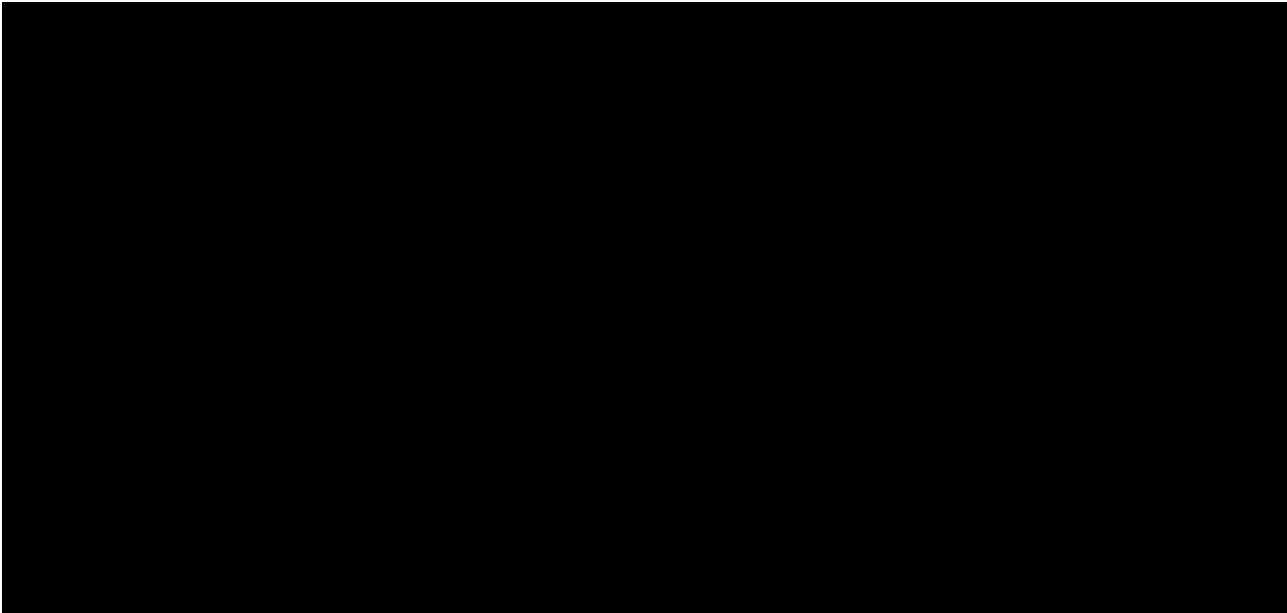
B.3. Proposer's Pending Litigation and Judgments

None: There are no currently known claims or outstanding judgments that have previously impaired or would materially impair Yardi's ability to provide the products or services set forth in this response.

B.3.1. Financial Statements

Yardi offers the security of a conventionally managed firm with a long history of revenue and market share growth and a long-range business plan to continue product and service expansion as a privately held corporation. [REDACTED]

[REDACTED] Because our company is privately held, our financial information is confidential. To meet your request for financial statements in the RFP, we are submitting a sealed copy of our two most recent years' financial statements directly to a certified public accountant (CPA) with your agency under separate cover. The following chart depicts our revenue growth over the last decade.



Proposer's Approach to Provide Required Services

On the following pages, we demonstrate how we will meet the solution and service requirements outlined in the RFP, including those specified in Appendix B – Statement of Work. Because HACoLA is already live on the Yardi Voyager® platform, you will only need to move to the Yardi Private Cloud and upgrade to the latest version, 7S. This approach eliminates the need for a lengthy, costly, and risky implementation project, data conversion, or extensive user training. While training is available at all times, most of our upgrading clients' staff do not need any classes and can begin working with confidence in Yardi Voyager 7S immediately.

Section C. Proposer's Approach to Provide Required Services (Confidential)

We request that HACoLA treat the information in this section as confidential under the Public Records Act as permitted under paragraph 1.14 of the RFP.

C.1. Fully Managed Solution

(1) Provide web-based software tools hosted Off Premise;

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(2) Provide annual subscription maintenance;

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(3) Demonstrate the availability and technical capability to provide a highly secure hosting infrastructure for access to the Fully Managed Solution;

[Redacted]

[Redacted]

- (4) Provide Advanced Intrusion Detection and Firewall;

[Redacted]

- (5) Demonstrate availability to offer Public Housing and Section 8 Programs' Administration Software Solution Consulting services;

[Redacted]

- (6) Provide Software as a Service (SaaS), in either a shared or dedicated environment that can provide the Housing Authority with the benefits of a round-the-clock data center;

[Redacted]

[Redacted]

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(7) Accept the Housing Authority Service Level and Warranty Agreement (See Exhibit P);

Yardi acknowledges HAcOLA's service level and warranty agreement provided as Exhibit P to the RFP. Please see [Section F. Acceptance of Terms and Conditions in Required Contract and Requirements of the Statement of Work \(SOW; Confidential\)](#) for our proposed contract language.

(8) Provide an assessment of the Housing Authority's current Public Housing and Section 8 Programs' Administration Software Solution infrastructure readiness to transition to the hosted Solution;

[Redacted]

(9) Integrate with the Housing Authority's Active Directory;

[Redacted]

(10) Train Housing Authority staff on the Solution use and general maintenance of it.

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C.2. Conversion Solution and Implementation Process

- (1) Proposer must describe its understanding of the scope of work, an overview of its proposed Solution and its methodology for achieving its Solution. This narrative should include but not necessarily be limited to:
 - (1a) Describing, in detail, how the consultant will convert existing data, implement the proposed system, and train Housing Authority staff.
 - (1b) Completing the provided Compliance Matrix Form provided in *Appendix C – Required Forms*, that matches the Housing Authority’s requirement with the consultant’s proposed Solution. The Matrix will list the requirements and solutions in the same order as they are listed in *Appendix B – Statement of Work for On Premise or Fully Managed Solution* and be numbered in the same way. The Proposer must describe how the proposed solutions will fulfill each requirement. Columns are provided in the Matrix for the Proposer to identify whether the requirement is:
 - » provided Standard (SD) as part of the Proposer’s system already developed;
 - » will be delivered to Housing Authority as part of the Proposer’s solution with Moderate Change (MC) to the standard software;
 - » will be delivered with a more Significant Customization (SC) effort for changes to the standard software. Proposer must provide an estimate for the timeline and cost;
 - » the requirement will be delivered by or through integration with a Third Party (TP), to be identified by the Proposer as TP; or
 - » the Proposer will work with the Housing Authority to do Integration (INT) of existing modules with the Proposer’s solution.
 - (1c) Providing a detailed Microsoft Project Plan that includes timeline and tasks for the entire project life cycle.

[REDACTED]

C.3. System Design

- (1) Proposers must describe one or more proposed system designs. This description should include a description of the application including but not limited to the modules,

enhancements, tools, and all other relevant requirements to support the system, contained in *Appendix B, Statement of Work for On Premise and Fully Managed.*

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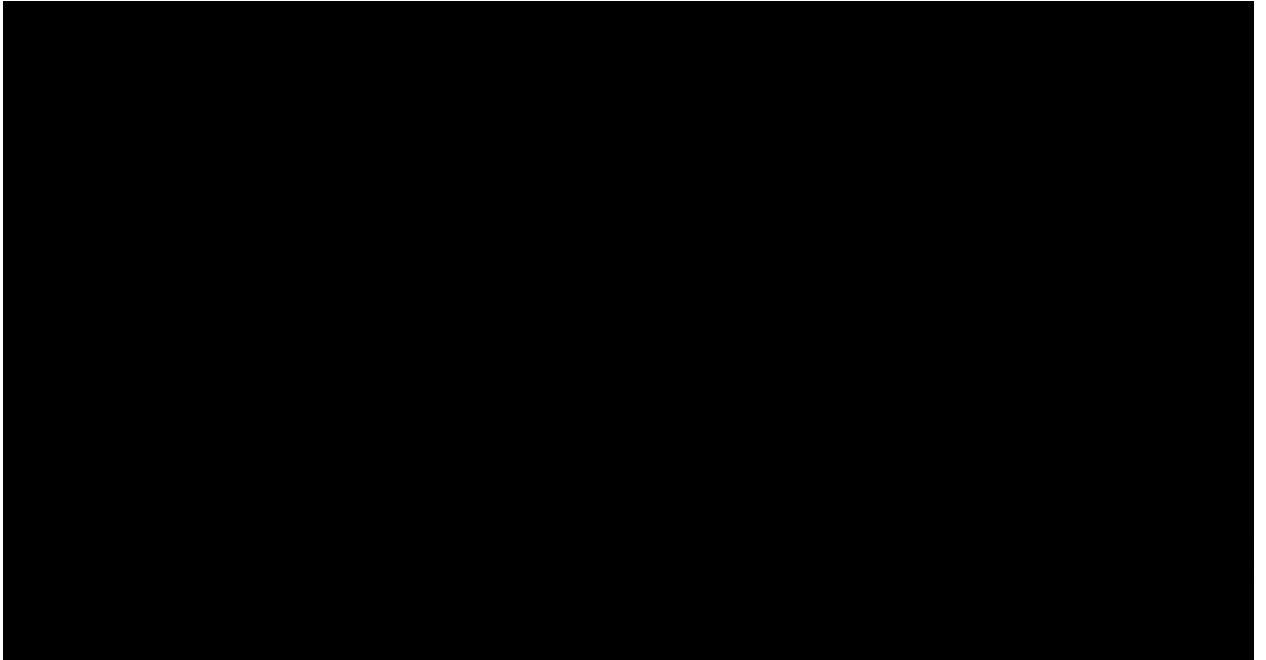
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C.4. Conversion

- (1) Proposers must describe its approach to converting data from the current Housing Authority system. Provide a timeline proposal provided in Microsoft Project Plan.

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C.5. Project Schedule

- (1) Proposers must provide a preliminary project schedule that includes timeframes and milestones for the specific requirements and deliverables listed in *Appendix B, Statement of*

Work for On Premise and Fully Managed as well as the estimated timeframe in which the system modules and functionalities will be delivered to the site; the date the system will be installed and date the system will go live in production.

[Redacted]

[Redacted]

C.6. Implementation Plan

- (1) Proposers must describe the implementation plan including data migration, with assurance that data shall be protected during migration and storage; methods; coordination with the Housing Authority; and expected time frame for each step – milestone and task.

[Redacted]

C.7. Commercial, Off-The-Shelf (COTS) vs. SaaS vs. Proprietary/Custom Software

- (1) Proposer must specify its delivery approach – local installation (On Premise) or cloud based service (Fully Managed) – and provide the support models for the delivery approach. Proposers are encouraged to offer any or all delivery options. The associated costs must be itemized in *Appendix C, Required Forms - Cost Sheet*.

[Redacted]

C.8. Operations and Maintenance

- (1) Proposers must include an operation and maintenance plan that addresses maintenance and repairs that will be performed by Proposer.

[REDACTED]

C.9. Support and Technical Assistance

- (1) Proposer must provide methodology, processes and resources how they will provide Support and Technical Assistance, for example but not limited to:
 - » diagnosis of problems or performance deficiencies of the Software;
 - » resolution of problems or performance deficiencies of the Software;
 - » provide telephone software support on a business day basis. Business day is defined as 6:00 AM through 6:00 PM pacific standard time, excluding holidays and weekends; and
 - » provision of patches, updates, releases and new versions of the supported Software along with other generally available technical material. All patches, updates, releases and new versions shall be subject to the license agreement related to the supported Software.

[REDACTED]

C.10. Integration with Laserfiche

- (1) Proposer must include a plan as to how data and documents will integrate to Laserfiche Rio for the attachment of tenant or owner documents. Laserfiche Rio system is the Housing Authority's Enterprise Content Management System (ECMS). The Laserfiche Rio system

allows the Housing Authority to consolidate all its records into a single system for managing records access and retention. Any system proposed must be able to integrate with the Laserfiche Rio system for management of attachments and long term records storage.

[REDACTED]

C.11. Integration with PeopleSoft

- (1) Proposer must include a plan for how the system will integrate to PeopleSoft in order to automate monthly G/L data. PeopleSoft is the Housing Authority's Enterprise Resource Planning (ERP) software for procurement, human resources and financial systems.

[REDACTED]

C.12. Documentation

- (1) Proposer must provide mapping and detail process documentation for System Design, Conversion, Enhancement and all applicable material as a reference guide.

[REDACTED]

Section D. Proposer's Quality Control Plan (Confidential)

We request that HACoLA treat the information in this section as confidential under the Public Records Act as permitted under paragraph 1.14 of the RFP.

- (1) **Provide a comprehensive Quality Control Plan to be utilized by the Proposer as a self-monitoring tool to ensure the required services are provided as specified in *Appendix B - Statement of Work for On Premise and Fully Managed*, not only during delivery and implementation of the product, but also throughout the life of the contract when maintaining or enhancing the product. The following factors may be included in the plan:**
 - » **Activities to be monitored to ensure compliance with all Contract requirements;**
 - » **Monitoring methods to be used;**
 - » **Frequency of monitoring;**
 - » **Samples of forms to be used in monitoring;**
 - » **Title/level and qualifications of personnel performing monitoring functions; and,**
 - » **Documentation methods of all monitoring results, including any corrective action taken.**
 - » **Illustrations to convey workflow, tasks and resources utilized to ensure a Quality product.**
 - » **Documentation and/or illustration(s) to describe methodology for Testing, Quality Control, Release and Software configuration management**

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Section E. Demonstration and Interview

Yardi acknowledges HCoLA's terms and planned format for solution demonstrations and interviews in Section 2.8.7 of the RFP. We look forward to presenting and discussing Yardi Voyager® 7S with your team.

Section F. Acceptance of Terms and Conditions in Required Contract and Requirements of the Statement of Work (SOW; Confidential)

We request that HACoLA treat the information in this section as confidential under the Public Records Act as permitted under paragraph 1.14 of the RFP.

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F.1. Sample Software License & Service Level Agreement

The following sample license agreement includes product warranty, technical support, maintenance, and service level information. Use of Yardi software requires a license agreement between HACoLA and Yardi.

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Section G. HUD Section 3 Compliance

Yardi acknowledges HAcOLA's Section 3 requirements outlined in Section 2.8.9 and Appendix E of the RFP. Our company is not a Section 3 business concern and does not plan to subcontract any of the proposed services; we select Section 3 compliance option 2 outlined in Section 2.8.9 of the RFP. Given our experience in providing solutions of similar complexity, we are confident that Yardi possesses all the required capabilities and staffing to complete this project. At this time, we do not plan to engage additional staff; however, if the need to supplement our resources should arise, we will make every effort to interview and engage personnel consistent with your Section 3 goals.

Please note that our minimum requirements for the personnel involved in completing most aspects of this project include, but are not limited to, advanced to expert knowledge of:

- » Computer systems
- » Accounting principles
- » Database structures
- » HUD regulations

In the event that Yardi requires outside assistance for lesser-skilled tasks such as data entry or data collection associated with this contract, we will make a good faith effort to secure the services of qualified Section 3 individuals and Section 3 business concerns or meet your Section 3 requirements another way. If no additional hiring is necessary, Yardi will make a good faith effort to provide training to Section 3 persons to the greatest extent feasible and consistent with all applicable laws. We submit a signed Declaration of Intent to Comply with Section 3 Requirements Form on the next page.

DECLARATION OF INTENT TO COMPLY WITH SECTION 3 REQUIREMENTS

As a minimum requirement for consideration of a contract award, the Bidder/Proposer shall be a qualified Section 3 business concern or shall declare his/her intent to comply with Section 3 (24 CFR 135) of the Housing and Urban Development Act of 1968, as amended (Section 3). The Bidder/Proposer is obliged, to the greatest extent feasible, to give opportunities for training and employment to low-income and very low-income persons residing in the service area or neighborhood in which the Section 3 covered project/service is located, and/or to award subcontracts to business concerns that provide economic opportunities for Section 3 residents.

Bidders/Proposers who are not qualified Section 3 business concerns must agree that, prior to recommendation for contract award, he/she will agree to comply with the Section 3 requirements by including the Section 3 Clause in the contract and by submitting a "Section 3 Economic Opportunity Plan." The Section 3 Economic Opportunity Plan shall demonstrate the number of new hires and Section 3 new hires, and/or subcontracts that the Bidder/Proposer establishes to meet the following goals:

- 30% of all new hires will be Section 3 Residents, and/or
- Subcontract(s) will be given to Section 3 Business Concerns.

Failure to submit a Section 3 Economic Opportunity Plan prior to a recommendation to award a contract shall be grounds to determine the Bidder/Proposer non-responsive, and not be considered for contract award.

The Bidder/Proposer shall complete all of the following information, sign where indicated below, and return this form with his/her bid/proposal.

1. The Bidder/Proposer is willing to consider hiring Section 3 Residents for any future employment openings if the Section 3 Resident meets the minimum qualifications for the opening. ("Consider" means that the Bidder/Proposer is willing to interview qualified Section 3 Residents.)

YES NO

AND/OR

2. The Bidder/Proposer will consider subcontracting with Section 3 Business Concerns for this project/service.

YES NO

Yardi Systems, Inc.

430 S Fairview Ave, Santa Barbara, CA 93117

Name of Contractor/Subcontractor


Address

Arnold Brier

Vice President

Print Name

Title



Signature

June 30, 2016

Date

Section H. Business Proposal Required Forms (Confidential)

We request that HACoLA treat the information in this section as confidential under the Public Records Act as permitted under paragraph 1.14 of the RFP. This section contains signed and dated copies of the following forms as provided in Appendix C - Required Forms in the RFP, in the order listed below:

- » Compliance Matrix Form
- » Application for Exemption and Certification Form for the Jury Service Program
- » Charitable Contributions Certification
- » Conflict of Interest Certification
- » Contingent Fee Representation and Agreement
- » Defaulted Property Tax Reduction Program Certification
- » EEO Certification
- » Federal Lobbyist Requirements Certification
- » Payee Registration Package:
 - › Payee Registration Form
 - › Organization Information Form: Please note that our employee tracking system providing the diversity data on this form uses the following federal EEO categorization: American Indian or Alaska Native (Not Hispanic or Latino), Two or More Races (Not Hispanic or Latino), White (Not Hispanic or Latino), Asian (Not Hispanic or Latino), Hispanic or Latino, Black or African American (Not Hispanic or Latino), and Native Hawaiian or Other Pacific Islander (Not Hispanic or Latino).
 - › We also attach a copy of our Minority Business Enterprise (MBE) certification following this form.
 - › Authorization Agreement for Direct Deposits Automated Clearing House Credits (ACH): Melanie Calbow, Finance Manager at Yardi, submitted this form on June 21, 2016 by email to DirectDepositProgram@lacdc.org, as instructed on the form. It is **not** replicated in this proposal package.
 - › Request for Taxpayer Identification Number and Certification (IRS Form W-9)

We include other required forms in the appropriate and designated sections of this proposal as requested in the RFP, including:

- » Prospective Contractor List of Contracts, References, and Terminated Contracts: Please see **Section B.2 Proposer's References**.
- » Cost Sheet for On-Premise Solution: We omit this form because we do not offer or propose an on-premises solution for HACoLA.
- » Cost Sheet for Fully Managed Solution: Please see our cost proposal under separate cover in this proposal package.
- » Proposer's Questionnaire and Affidavit: Please see the front of this proposal immediately following the cover letter.
- » Declaration of Intent to Comply with Section 3 Requirements: Please see **Section G. HUD Section 3 Compliance**.

**Public Housing & Section 8 Administration Software
Compliance Matrix Form**

Proposers Company Name: Yardi Systems, Inc.

Instructions:

Complete the provided Compliance Matrix Form that matches the Housing Authority's requirement with the proposed solution. The matrix will list the requirements and solutions in the same order as they are listed in Appendix B – Statement of Work and be numbered in the same way. The Proposer must describe how the proposed solutions will fulfill each requirement. Columns are provided in the matrix for the Proposer to identify whether the requirement is: a) provided Standard (SD) as part of the Proposer's system already developed; b) will be delivered to Housing Authority as part of the Proposer's solution with Moderate Change (MC) to the standard software; c) will be delivered with a more Significant Customization (SC) effort for changes to the standard software. Proposer must provide an estimate for the level of effort for this customization; d) the requirement will be delivered by or through integration with a Third Party (to be identified by the Proposer as TP); or e) the Proposer will work with the Housing Authority to do Integration (INT) of existing modules with the Proposer's Solution. Please use the comments field to provide additional effort or information that will help to evaluate any particular line item. If additional space is required, please use additional sheet of paper, the Proposer Name as the header, and labeling the Line Number, SOW Section and the continued comment.

Legend:

SD – Standard	Requirement is standard to application software no modification needed.
MC – Moderate Change	Application software will satisfy this requirement with moderate modification (to be accomplished within two days)
SC – Significant Change	Significant customization (beyond two days) is needed to satisfy the requirement. Estimate included in Comments
TP – Third Party/Partner	Requirement is satisfied with or through integration with Third party provider (to be identified in Comments)
INT - Housing Authority Integration	Integration of existing modules with Proposer's Solution
	Not Applicable

Line Number	SOW Section	Requirement Description	<i>Check applicable column</i>					Comments
			SD	MC	SC	TP	INT	
Database and Technical Requirements								
1	3.1.1	Microsoft SQL and XML applications such as Internet based waiting list.						
2	3.1.2	Delivered Web services enabling queries for staff and clients (or clients' systems) to retrieve data online.						
3	3.1.3	Clearly defined database layouts and data dictionary with minimal data redundancy.						

**Public Housing & Section 8 Administration Software
Compliance Matrix Form**

Proposers Company Name: Yardi Systems, Inc.

Line Number	SOW Section	Requirement Description	<i>Check applicable column</i>					Comments
			SD	MC	SC	TP	INT	
4	3.1.4	Clearly defined server, workstation and network resource needs.						
5	3.1.5	Ability to perform data maintenance and system updates quickly with minimal to no impact on users daily activities						
6	3.1.6	Data archiving utilities for the purpose of keeping large databases performing at optimal levels.						
7	3.1.7	Real-Time Utilities to monitor who's logged into the system troubleshoot errors and monitor system performance.						
Systems' Integration Requirements - Replace/provide equivalent functionality provided by or integrate/interface with the following in-house or 3rd party systems or services								
8	3.2.1	Applicant Registration Portal for the general public to register, update, and/or view their waiting list application status (online). Furthermore, any changes done by public inquiry via the portal the system must automatically be updated in real-time and to include audit trails regarding any changes done (regardless if changes were done by the public or internal staff).						
9	3.2.2	Green Route System (GRS) which integrates with the Housing Authority PeopleSoft and current Housing System provider to provide smart routes (integrating with and sent to Housing Authority-developed iPad app) for Inspectors - developed by 3rd party provider;						
10	3.2.3	HQS mobile inspections -iPad app developed by the Housing Authority which integrates with current provider						

**Public Housing & Section 8 Administration Software
Compliance Matrix Form**

Proposers Company Name: Yardi Systems, Inc.

Line Number	SOW Section	Requirement Description	<i>Check applicable column</i>					Comments
			SD	MC	SC	TP	INT	
11	3.2.4	REAC mobile inspections - Tablet app developed by the Housing Authority which integrates with current provider						
12	3.2.5	Mobile app for Work Orders which is integrated with housing system and mobile inspections						
13	3.2.6	Inspections Dashboard for management and inspectors to track and monitor inspections' operations						
14	3.2.7	System auto creates/batches, and approves code 13 - 50058s (HQS Annual Inspections) to minimize manual intervention. Also, provides a report to capture any exceptions which failed the code 13 batching process and alert the inspections unit via email.						
15	3.2.8	Tenant Portal allows tenants to view and report information online. Functionality includes but is not limited to submitting annual reexamination information, reporting income/family composition changes, viewing their inspection information, rent information, and status. Caseworkers should be able to view, approve or deny all online submissions. Portal should be capable of pushing online submission forms from the portal to Laserfiche Document Management system.						
16	3.2.9	Owner Portal allows owners to report owner information, such as but not limited to address changes, direct deposit banking information, change of ownership, and management company changes. Owners can check inspection status, tenant/Housing Assistance Program (HAP) modifications that affect the owners, abatement status (failed owner inspections due to owner caused deficiencies), owner overpayment notices, and a summary HAP report for owners who have multiple tenants.						

**Public Housing & Section 8 Administration Software
Compliance Matrix Form**

Proposers Company Name: Yardi Systems, Inc.

Line Number	SOW Section	Requirement Description	<i>Check applicable column</i>					Comments
			SD	MC	SC	TP	INT	
17	3.2.10	Interactive (mobile) check-in system for our clients (e.g., owners, applicants, tenant, and the general public) to inform assigned case worker that the recipient of the scheduled appointment has arrived (to tie in with the assigned case worker as identified in the system based on the tenant, landlord, or applicant identification (system identification/Social Security #/Tax ID #).						
18	3.2.11	PeopleSoft (ERP) Human Capital Management (HCM) - interface all G/L information from Housing System to ERP. Link case workers and inspectors to respective employee information in ERP						
19	3.2.12	GoSection8 (Rent Comp system) -Provide seamless integration between housing system and the GoSection8 system to eliminate duplicate data entry.						
20	3.2.13	Facilitate integration that allows the system to interface with LaserFiche (Document Management system) to view owner/tenant/other PHA related documents.						
21	3.2.14	Facilitate integration with the Housing Authority's Shortel Phone system that allows respective tenants and owners to route their call to the assigned case manager based on their owner and tenant identification.						

**Public Housing & Section 8 Administration Software
Compliance Matrix Form**

Proposers Company Name: Yardi Systems, Inc.

Line Number	SOW Section	Requirement Description	<i>Check applicable column</i>					Comments
			SD	MC	SC	TP	INT	
22	3.2.15	Public Housing Portal which enables tenants to view monthly rent statements and make payments online. Portal integrates with financial institution's Payment Collection gateway.						
General Functionality Requirements								
23	3.3.1	Built in Quality Control mechanism with data integrity enforcement including date/time-stamped audit trail logging, history tracking on status changes and processes as defined by the Housing Authority. For example, if a record is deleted, modified, or created, an audit trail should record the transaction information, including the date and time deleted or created, and user who deleted or created it. If a tenant, applicant, or owner status is changed, a log of changes should be kept so that the history of changes can be tracked. The Audit Trail should track all changes within each respective module and their fields within the database without affecting system performance.						
24	3.3.2	If the Housing Authority chooses, at some future date, to manage other Public Housing Agencies (PHA), the solution will need to support separate management of these separate agencies and/or Special Programs under the same installation – including the management of separate waiting lists, ACC (Annual Contributions Contract) units, leases, and 50058/50059 processing and submission to HUD under an independent PHA code. Ability to track/process applicants in multiple waiting lists simultaneously with "Applications in process" without disrupting the validity of the data/status for the other active waiting list records or applications in process. Financial Tracking of administrative and HAP expenditures and revenues from multiple sources. Each ACC managed by the Housing Authority would be independent and must be tracked as independent Housing Authorities						

**Public Housing & Section 8 Administration Software
Compliance Matrix Form**

Proposers Company Name: Yardi Systems, Inc.

Line Number	SOW Section	Requirement Description	<i>Check applicable column</i>					Comments
			SD	MC	SC	TP	INT	
25	3.3.3	Ability to add user-defined objects, either for delivered system's interface(s) or custom and configurable screens to be added by HACoLA, for other internal PHA tracking needs						
26	3.3.4	Individual and group security features by system function or user/group responsibilities by module, screen, and/or specific fields where needed.						
27	3.3.5	The Solution should enforce staff to clear all fatal and warnings before the 50058 can be approved. Built-in 50058/50059 processes with full PIC/TRACS compatibility including format, validation, and submission. These processes must be in accordance with applicable HUD Technical guidelines. For example, 58 processing must be in compliance with PIC's validations according to the 50058 Instructions Booklet and HUD's Technical Reference Guide Book.						
28	3.3.6	The Solution should have automated forms management/development/generation and tracking capability linked to specific functions. The system should be able to auto-generate and populate forms, driven by data from a user action or a scheduled task.						
29	3.3.7	The Solution should have the capability to allow users to print, view, and/or export reports and forms in various formats.						
30	3.3.8	The Solution must have a built in support function that allows the agency to update their letterheads for all forms within the system. Example, if the agency logo, Executive Director name or Board of Commissioners name change, all letterheads can be updated in mass with one function as oppose to updating each letter.						

**Public Housing & Section 8 Administration Software
Compliance Matrix Form**

Proposers Company Name: Yardi Systems, Inc.

Line Number	SOW Section	Requirement Description	<i>Check applicable column</i>					Comments
			SD	MC	SC	TP	INT	
31	3.3.9	Help Screens to include glossary for field uses and terminology						
32	3.3.10	Automated scheduler function that allows staff to create "scheduled" reports that can be saved or emailed to the user or distribution of users.						
33	3.3.11	Reports filtering should allow for results based on any range of time.						
34	3.3.12	The Solution should have a function that allows staff to create adhoc reports and should auto track the author, specifications, and store in a central reporting menu set for all other uses to view.						
35	3.3.13	The Solution should have a Report Directory. Directory should include report legend and location of reports. Vendor must also update the Report Directory according to any changes (not only at upgrades).						
36	3.3.14	System Manual (user guides) to include glossary for field uses and terminology. Furthermore, the vendor must also provide updated manuals (as changes occur).						
37	3.3.15	The Contractor must provide technical and end-user training for implementation. Online courses and webinars should be provided to keep the Housing Authority abreast of compliance or system updates.						
38	3.3.16	The Solution should provide the user with a status on reports, or posting to determine whether a report is running or if a report request was successful.						

**Public Housing & Section 8 Administration Software
Compliance Matrix Form**

Proposers Company Name: Yardi Systems, Inc.

Line Number	SOW Section	Requirement Description	<i>Check applicable column</i>					Comments
			SD	MC	SC	TP	INT	
Public Housing Requirements								
39	3.4.1	Built in support for Lockbox Rent Collection from Tenants (Public Housing).						
40	3.4.2	Built-in support for Automated Clearing House (ACH) for pre-authorized debits to tenants' bank accounts (rent charge collection) via a debit file creation and ACH credits to prepaid cards issued for Utility Reimbursements (URPs). The Solution should distinguish between URPs via an ACH credit to a prepaid card and payments made to the PHA via an ACH debit to the payors account. The Solution should have the capability to automatically disable the Electronic Funds Transfer (EFT) payment method for Public Housing (PH) tenants who are no longer eligible for URPs.						
41	3.4.3	The Solution should provide automation to individual sites for the PH monthly rent statements (to include tenant ID, name, unit address, current charge, outstanding balances, and # of day's delinquent).						
42	3.4.4	Provide illustrations and tools which facilitate the audit and approval/denial of monthly scheduled charges at various functional or hierarchical roles by site.						
43	3.4.5	Ability to track and report offline units and HUD expiration or extension submission dates. Goal is to allow public housing staff to pre-identify units that are due for HUD extensions (remain offline).						
44	3.4.6	The Solution should have the capability to track different stages of the Public Housing Resident Services Program such as but not limited to the interview process, needs assessment, referrals, and action plans. The system should provide statistical and participant progress reports to monitor the different aspects of the program.						

**Public Housing & Section 8 Administration Software
Compliance Matrix Form**

Proposers Company Name: Yardi Systems, Inc.

Line Number	SOW Section	Requirement Description	<i>Check applicable column</i>					Comments
			SD	MC	SC	TP	INT	
45	3.4.7	The Solution must deliver functionality for Community Service Requirements (CSR) where the Housing Authority can adequately track the community service requirements by adult member living in public housing as mandated by HUD. Tracking includes, community service type, hours, and agency contact (to verify community service hours/type).						
46	3.4.8	Public Housing -Performance Report (mirrors the Public Housing Assessment Systems HUD reporting). System must provide a summary report of the overall PH operations. The report must include the number of inspections completed (tie in with FY calendar), # of work orders and turnaround time to complete (tie in with FY calendar), Vacancy Unit Turn-Around Time (VUTT) by AMPs, # of vacant units (include # of days vacant), # of offline units, and dollar amount Rents Charged/Rents Collected/outstanding Balance (include regular rents, maintenance and other related fees, including fraud collections).						
47	3.4.9	The Solution should have the capability to auto track and report delinquent rent payers (including each historical occurrence). The system should facilitate auto generation of notices based on the delinquencies as well as other legal notices to Public Housing tenants (e.g., 30day notice, 14-day, 3-day notice, 60-day notice, and notice to appear for counseling). A historical audit trail should be available for record keeping (potential eviction cases that may result in legal proceedings).						
48	3.4.10	Built-in tracking mechanism that tracks the number of Non Sufficient Fund (NSF) charges and capability to reverse NSF counts when tenant is not at fault (e.g., identity theft, frozen accounts due to deceased tenants, etc.).						

**Public Housing & Section 8 Administration Software
Compliance Matrix Form**

Proposers Company Name: Yardi Systems, Inc.

Line Number	SOW Section	Requirement Description	<i>Check applicable column</i>					Comments
			SD	MC	SC	TP	INT	
49	3.4.11	Maintenance Work Order system, fully integrated with Inventory Management by site/AMP.						
50	3.4.12	Property/Unit Management must include the tracking of details regarding location of all utility meters (water, gas, and electricity) by site/unit/AMP.						
51	3.4.13	Ability to track construction projects (tracking should include but not be limited to: projects by site, project type, and reports that include the historical costs/scope of work and completed project dates)						
Section 8 Program Requirements								
52	3.5.1	SEMAP Compliance Tracking and Reporting						
53	3.5.2	The Solution must include VMS reporting requirements.						
54	3.5.3	The Solution should have the ability to conduct the Rent Reasonableness test (HUD requirements for lease ups) and create a report on the results. The report should include (the prorated HAP/Tenant Rent, full HAP/tenant Rent, owner and tenant information, including assisted unit address, to name a few). The system should have the ability to run statistical reports on rent reasonableness determinations (e.g., fails and pass).						
55	3.5.4	The Solution should have a built in function for the 1099 form for landlords and file transmission to IRS. The Solution should have an exception report to identify duplicate records.						
56	3.5.5	The Solution should facilitate Direct Deposit HAP payments to owners						

**Public Housing & Section 8 Administration Software
Compliance Matrix Form**

Proposers Company Name: Yardi Systems, Inc.

Line Number	SOW Section	Requirement Description	<i>Check applicable column</i>					Comments
			SD	MC	SC	TP	INT	
57	3.5.6	Built in feature to search for existing owner Tax ID or SSN by vendor/landlord to avoid creating duplicate owner cards (minimize duplicates). System should have the capability to block duplicate SSN's or TIN's with an override function. System should also have a Vendor Payment ledger with the ability to subtotal payments per month.						
58	3.5.7	Housing Authority Portal (Portability) for other PHAs to electronically communicate with the Housing Authority by submitting/upload their billing information or voucher absorption changes. System should flag assigned staff to execute changes to ensure HUD compliance (according to portability requirements).						
59	3.5.8	System should include a Management Dashboard that provides a daily summary activity (for example but not limited to: # inspection scheduled, inspections/annuals completed/delinquent, # of leased units/vacant units, vouchers issued/outstanding, daily appointments by employee, and case load listing) System should also include an Employee Dashboard that provides a daily summary for staff of their pending assignments and appointments for example but not limited to delinquent Annual re-exams, Voucher Issuance, HQS actions (abatements), proposed terminations, applications.						

**Public Housing & Section 8 Administration Software
Compliance Matrix Form**

Proposers Company Name: Yardi Systems, Inc.

Line Number	SOW Section	Requirement Description	<i>Check applicable column</i>					Comments
			SD	MC	SC	TP	INT	
60	3.5.9	Functionality to automatically schedule and assign inspections based on next inspection due date (10 months from the last inspection date pass). For example: Automate Inspections batching, scheduling, and inspectors routing for all programs (must include the HUD requirements for the Project Based program as it relates to the annual inspections-20% pass rate). Also dashboard must have the capability to monitor daily progress for scheduled inspections by inspector. Function should also include the ability to generate the Notices regarding scheduled inspections to owners/tenants (for each inspection batching). System should have the capability to alert staff of pending inspections due that have not been scheduled.						
61	3.5.10	System should have ability to detect duplicate unit addresses and should incorporate the United States Postal Coding (USPC) for the validity of the address (e.g., Google maps method). System should block duplicate address entry and unit numbers should not be connected to a program type. Units should not be connected to a program type. Units should be interchangeable between programs.						
62	3.5.11	Portability Reports to monitor all Administered Port-In's and Port-Out's as well as incoming and outgoing ports. Report should include where the portability record is in process (for example but not limited to: voucher issuance, RFTA received, lease up with its respective billing or absorb code). Furthermore, the system should auto generate a 52665 with the billing date/information. System should also have a functionality that allows automatic updates of the Portability Administrative fees as they change.						

**Public Housing & Section 8 Administration Software
Compliance Matrix Form**

Proposers Company Name: Yardi Systems, Inc.

Line Number	SOW Section	Requirement Description	<i>Check applicable column</i>					Comments
			SD	MC	SC	TP	INT	
Common Requirements for both Assisted Housing and Housing Management								
63	3.6.1	Built-in tracking that allows management to track all End of Participations (EOP) and/or moves by reason type and specified time frames (Note: 50058 only records EOP but not the reason for EOP). It would be beneficial to internally track the reasons for EOP or moves from one property/unit to another within the Housing Authority programs.						
64	3.6.2	Ability to track unit history (former tenants including user audit trail to track changes done by date/time/user ID).						
65	3.6.3	Ability to track tenant history (moves, transfers to other units/properties), including user audit trail to track changes done by date/time/user ID).						
66	3.6.4	System should allow management to execute a caseload distribution based on the Housing Authority's criteria, such as zip code, tenant name, property/unit characteristics						
67	3.6.5	Verification of hierarchy tracking module to ensure compliance with HUD recommended levels of verification.						
68	3.6.6	System must include all FSS tracking, including Portability, and reporting requirements to ensure HUD compliance.						
69	3.6.7	System should include a Waiting List Management Dashboard for Section 8, Special Programs, and Public Housing Applicants. The module should include demographic reports on applicants, # of applicants per wait list, PHA preferences (for example but not limited to: homeless, veteran, domestic violence, jurisdiction, and senior status)						

**Public Housing & Section 8 Administration Software
Compliance Matrix Form**

Proposers Company Name: Yardi Systems, Inc.

Line Number	SOW Section	Requirement Description	<i>Check applicable column</i>					Comments
			SD	MC	SC	TP	INT	
70	3.6.8	System should allow for waiting list selection based on program rules and be able to track each selection respectively. A selection report should be available to illustrate preferences and other criteria to determine accuracy prior to the official selection from the respective waiting list.						
71	3.6.9	Capability to track applications in process for each selection. Reports to show, for example but not limited to, the total selected, date selected, # of applications cancelled, # leased.						
72	3.6.10	System should enable mass cancellation of Waiting List applicants.						
73	3.6.11	System should auto flag system users for possible duplicate Tenants to avoid duplicate subsidies.						
74	3.6.12	Built-in function that allows staff to transfer an existing tenant from one program to another without affecting or disrupting the original tenant record and historical financial information.						
75	3.6.13	Integration of appointment scheduling with Outlook. For example, if mass or individual appointments are scheduled via the system, each appointment should reflect on the Microsoft Outlook Calendar.						
76	3.6.14	System must include the memo functionality for case notes. Notes should track the date memo entered, user who created the memo and memo type. Staff should not have the capability to back date notes. Also, system should have a Memo Report function that allows staff to print memos within a respective tenant/applicant record by date range or print all memos regardless of date range.						

**Public Housing & Section 8 Administration Software
Compliance Matrix Form**

Proposers Company Name: Yardi Systems, Inc.

Line Number	SOW Section	Requirement Description	<i>Check applicable column</i>					Comments
			SD	MC	SC	TP	INT	
77	3.6.15	System must have the ability to record/track ADA Reasonable Accommodation requests, reasons for the request, and approvals or denials.						
78	3.6.16	System must have the ability to record/track language preference (LEP requirement)						
79	3.6.17	System should have reports and graphic illustrations in place to capture the tenant and applicant demographics (for example but not limited to gender, age, ethnicity, race, annual income, veteran status, disability status, homeless status), for each individual/households, service area (SPA), AMPs (PH program), including County Supervisorial and Congressional Districts for any specified time frame.						
80	3.6.18	Workflow functionality to ensure various steps are followed for each functional business process, starting from application process through tenant end-of-participation. System should enforce compliance with HUD, the Housing Authority Administrative Plan, and have built-in 50058 and 50059 enforcements/validations throughout a process. System should provide reports to monitor workflow processes that can help management identify bottlenecks.						
81	3.6.19	Ability to configure and distribute assignments with due dates to caseworkers and track status of assignments through completion. System should provide reports to monitor the status of caseload assignments.						

**Public Housing & Section 8 Administration Software
Compliance Matrix Form**

Proposers Company Name: Yardi Systems, Inc.

Line Number	SOW Section	Requirement Description	<i>Check applicable column</i>					Comments
			SD	MC	SC	TP	INT	
82	3.6.20	System must have the ability to track all Criminal Background checks in process/approved/denied or pending finger printing for each respective applicant and other household members within the family composition, including existing tenants (family add-on for existing tenants). This function must include detailed reports for management to monitor the criminal background checks and related processing fees.						
83	3.6.21	Quality Control dashboard/function for supervisor/management to audit staff's completed files for program compliance. Dashboard should include random sampling for audit purposes (PHAS and SEMAP requirements). Also quality control features should capture errors and translate them into reports to identify training needs and staff evaluations.						
84	3.6.22	Built-in Function that tracks all Tenant Payment Agreements for Public Housing and Section 8 Tenants. Tracking must include reason for payment agreement, payment arrangement amount (for example but not limited to, down payment, monthly payment, full payment). Also, the system must include a monthly auto-generated report to management/division that captures all those who have defaulted on the agreement so the agency can persue legal matters as needed, including program termination						
Financial Management Requirements								
85	3.7.1	Full financial reporting capability, including but not limited to Accounts Receivable, Payables, G/L, Check register						
86	3.7.2	Aged Receivable report with ability for specific date cutoff						
87	3.7.3	Ability to interface G/L with other systems						
88	3.7.4	Ability to select electronic method of payment						

**Public Housing & Section 8 Administration Software
Compliance Matrix Form**

Proposers Company Name: Yardi Systems, Inc.

Line Number	SOW Section	Requirement Description	Check applicable column				Comments
			SD	MC	SC	TP	
89	3.7.5	Ability to house two distinct banking instructions for tenants. Example, one for ACH credits/payouts (URP Prepaid cards) and one for ACH debits/Receipts (rent)					
90	3.7.6	Enhance existing integration with Laserfiche to enable view of source documents scanned to support Journal entries					
91	3.7.7	Ability to run Tenant Prepay Report for specific cut-off date					
92	3.7.8	Ability to run Portability Statement to 'exclude 0.00 balances'					
93	3.7.9	Landlord overpayment tracking					
94	3.7.10	Financial transactions should include: transaction date, posting date, tenant ID, G/L account, Property ID, landlord ID (HAP).					
95	3.7.11	Users should be able to query or run reports for all financial transaction details within a posting date range, G/L account#, Property #, landlord ID, or any combination of these.					

Proposer further acknowledges that if any false, misleading, incomplete, or deceptively unresponsive statements in connection with this proposal are made, the proposal may be rejected. The evaluation and determination in this area shall be at the Executive Director's sole judgment and his/her judgment shall be final.

Proposer's Name: [Redacted]

Proposer's Name Title: [Redacted]

Address: [Redacted]

430 South Fairview Avenue, Santa Barbara, California 93117

E-mail address: [Redacted]

Telephone number: [Redacted]

(800) 866-1144 ext. [Redacted]

On behalf of Yardi Systems, Inc. (Proposer's name), I, [Redacted] (Name of Proposer's authorized representative), certify that the information contained in this Proposer's Compliance Matrix Form is true and correct to the best of my information and belief.

Signature [Redacted]

Date [Redacted]

**COMMUNITY DEVELOPMENT COMMISSION
CONTRACTOR EMPLOYEE JURY SERVICE PROGRAM
APPLICATION FOR EXEMPTION AND CERTIFICATION FORM**

The Community Development Commission's (Commission) solicitation for this contract/purchase order (Request for Proposal or Invitation for Bid) is subject to the Commission's Contractor Employee Jury Service Program (Program). All bidders or proposers, whether a contractor or subcontractor, must complete this form to either 1) request an exemption from the Program requirements or 2) certify compliance. Upon review of the submitted form, the Commission will determine, in its sole discretion, whether the bidder or proposer is exempted from the Program.

Company Name:	Yardi Systems, Inc.		
Company Address:	430 South Fairview Ave		
City:	Santa Barbara	State:	CA Zip Code: 93117
Telephone Number:	(800) 866-1144 ext. 1636		
Solicitation For (Type of Goods or Services):	Public Housing and Section 8 Programs' Administration Software Solution		

If you believe the Jury Service Program does not apply to your business, check the appropriate box in Part I (attach documentation to support your claim); or, complete Part II to certify compliance with the Program. Whether you complete Part I or Part II, please sign and date this form below.

Part I: Jury Service Program Is Not Applicable to My Business

- My business does not meet the definition of "contractor," as defined in the Program as it has not received an aggregate sum of \$50,000 or more in any 12-month period under one or more Commission contracts or subcontracts (this exemption is not available if the contract/purchase order itself exceeds \$50,000). I understand that the exemption will be lost and I must comply with the Program if my revenues from the Commission will exceed an aggregate sum of \$50,000 in any 12-month period.
- My business is a small business as defined in the Program. It 1) has ten or fewer employees; and, 2) has annual gross revenues in the preceding twelve months which, if added to the annual amount of this contract, is . \$500,000 or less; and, 3) is not an affiliate or subsidiary of a business dominant in its field of operation, as defined below. I understand that the exemption will be lost and I must comply with the Program if the number of employees in my business and my gross annual revenues exceed the above limits.

"Dominant in its field of operation" means having more than ten employees, including full-time and part-time employees, and annual gross revenues in the preceding twelve months, which, if added to the annual amount of the contract awarded, exceed \$500,000.

"Affiliate or subsidiary of a business dominant in its field of operation" means a business which is at least 20 percent owned by a business dominant in its field of operation, or by partners, officers, directors, majority stockholders, or their equivalent, of a business dominant in that field of operation.


- My business is subject to a Collective Bargaining Agreement (attach agreement) that expressly provides that it supersedes all provisions of the Program.

OR

Part II - Certification of Compliance

- My business has and adheres to a written policy that provides, on an annual basis, no less than five days of regular pay for actual jury service for full-time employees of the business who are also California residents, or my company will have and adhere to such a policy prior to award of the contract.

I declare under penalty of perjury under the laws of the State of California that the information stated above is true and correct.

Print Name: Arnold Brier	Title: Vice President
Signature: 	Date: June 30, 2016

CHARITABLE CONTRIBUTIONS CERTIFICATION

Yardi Systems, Inc.

Company Name

430 South Fairview Ave, Santa Barbara, CA 93117

Address

77-0049051

Internal Revenue Service Employer Identification Number

Not applicable

California Registry of Charitable Trusts "CT" number (if applicable)

The Nonprofit Integrity Act (SB 1262, Chapter 919) added requirements to California's Supervision of Trustees and Fundraisers for Charitable Purposes Act, which regulates those receiving and raising charitable contributions.

CERTIFICATION

YES NO

Proposer or Contractor has examined its activities and determined that it does not now receive or raise charitable contributions regulated under California's Supervision of Trustees and Fundraisers for Charitable Purposes Act. If Proposer engages in activities subjecting it to those laws during the term of a Community Development Commission (CDC) and/or Housing Authority contract, it will timely comply with them and provide the CDC and/or Housing Authority a copy of its initial registration with the California State Attorney General's Registry of Charitable Trusts when filed.

()

OR

YES NO

Proposer of Contractor is registered with the California Registry of Charitable Trusts under the CT number listed above and is in compliance with its registration and reporting requirements under California law. Attached is a copy of its most recent filing with the Registry of Charitable Trusts as required by Title 11 California Code of Regulations, sections 300-301 and Government Code sections 12585-12586.

()

Signature

Arnold Brier, Vice President

June 30, 2016

Date

Name and Title (please type or print)

CERTIFICATION OF NO CONFLICT OF INTEREST

CONTRACTS PROHIBITED

The Community Development Commission of the County of Los Angeles (Commission), shall not contract with, and shall reject any quote(s), bid(s), or proposal(s) submitted by, the persons or entities specified below, unless the Executive Director finds that special circumstances exist which justify the approval of such contract:

1. Employees of the Commission for which the Commission is the governing body;
2. Profit-making firms or businesses in which employees described in number 1 serve as officers, principals, partners, or major shareholders;
3. Persons who, within the immediately preceding 12 months, came within the provisions of number 1, and who:
 - a. Were employed in positions of substantial responsibility in the area of service to be performed by the contract; or
 - b. Participated in any way in developing the contract or its service specifications; and
4. Profit-making firms or businesses in which the former employees, described in number 3, serve as officers, principals, partners, or major shareholders.

Contracts submitted to the Executive Director for approval shall be accompanied by an assurance by the submitting division that these provisions have not been violated.

Yardi Systems, Inc.

Print Proposer Name



Official's Signature

Arnold Brier, Vice President

Print Proposer Official Title

June 30, 2016

Date

CONTINGENT FEE REPRESENTATION AND AGREEMENT

The bidder/proposer represents and certifies as part of its bid/ offer that, except for full-time bona fide employees working solely for the bidder/proposer, the bidder/proposer:

- (1) [] has, has not employed or retained any person or company to solicit or obtain this contract; and
- (2) [] has, has not paid or agreed to pay to any person or company employed or retained to solicit or obtain this contract any commission, percentage, brokerage, or other fee contingent upon or resulting from the award of this contract.

If the answer to either (1) or (2) above is affirmative, the bidder/proposer shall make an immediate and full written disclosure to the Procurement Officer.

Any misrepresentation by the bidder/proposer shall give the Community Development Commission of the County of Los Angeles/Housing Authority of the County of Los Angeles the right to (1) terminate the resultant contract; (2) at its discretion, to deduct from contract payments the amount of any commission, percentage, brokerage, or other contingent fee; or (3) take other remedy pursuant to the contract.

Authorized Official:

Name: Arnold Brier Title: Vice President

Signature:  Date: June 30, 2016

**DEFAULTED PROPERTY TAX REDUCTION PROGRAM
CERTIFICATION OF COMPLIANCE**

Company Name: Yardi Systems, Inc.		
Company Address: 430 South Fairview Ave		
City: Santa Barbara	State: CA	Zip Code: 93117
Telephone Number: (800) 866-1144 ext. 1636	Email address: Jeff.Bischoff@yardi.com	
Solicitation/Contract For: Public Housing and Section 8 Programs' Administration Software Solution		

The Proposer/Bidder/Contractor certifies that:

- It is familiar with the terms of the County's Defaulted Property Tax Reduction Program, Los Angeles County Code Chapter 2.206; AND

To the best of its knowledge, after a reasonable inquiry, the Proposer/Bidder/Contractor is not in default, as that term is defined in Los Angeles County Code Section 2.206.020.E, on any Los Angeles County property tax obligation; AND

The Proposer/Bidder/Contractor agrees to comply with the County's Defaulted Property Tax Reduction Program during the term of any awarded contract.

- OR -

- I am exempt from the County of Los Angeles Defaulted Property Tax Reduction Program, pursuant to Los Angeles County Code Section 2.206.060. The following exemption applies to my contract:
- Mandated by federal or state law or a condition of federal or state program;
 - The purchase is made through a state or federal contract;
 - The purchase is made for equipment or supplies for, or by the National Association of Counties,, U.S. Communities Government Purchasing Alliance, or other similar related group purchasing organization;
 - Sole source provider with exclusive and proprietary rights to services or goods;
 - Emergency services provider for services or goods;
 - Provide mission critical goods and/or services and is determined to be exempt by the Board of Commissioners;
 - Required to comply with the laws of the United States or California, which are inconsistent with this program.

I declare under penalty of perjury under the laws of the State of California that the information stated above is true and correct.

Print Name: Arnold Brier	Title: Vice President
Signature: 	Date: June 30, 2016

EQUAL EMPLOYMENT OPPORTUNITY CERTIFICATION

Yardi Systems, Inc.

Vendor's Name

430 South Fairview Ave, Santa Barbara, CA 93117

Address

77-0049051

Internal Revenue Service Employer Identification Number

GENERAL

The Contractor certifies and agrees that all persons employed by such firm, its affiliates, subsidiaries, or holding companies are and will be treated equally by the firm without regard to or because of race, religion, ancestry, national origin, or sex and in compliance with all anti-discrimination laws of the United States of America, the State of California, and all local ordinances. The Contractor further certifies that all subcontractors, suppliers, vendors and distributors with whom the Contractor has a contractual relationship are also in compliance with all applicable federal, state and local anti-discriminatory laws.

VENDOR'S CERTIFICATION

1. The vendor has a written policy statement prohibiting discrimination in all phases of employment.
2. The vendor periodically conducts a self-analysis or utilization analysis of its work force.
3. The vendor has a system for determining if its employment practices are discriminatory against protected groups.
4. Where problem areas are identified in employment practices, the vendor has a system for taking reasonable corrective action, to include establishment of goals of timetables.

Authorized Official:

Name: Arnold Brier Title: Vice President

Signature:  Date: June 30, 2016

**FEDERAL LOBBYIST REQUIREMENTS
CERTIFICATION**

Name of Firm: Yardi Systems, Inc. Date: June 30, 2016

Address: 430 South Fairview Ave, Santa Barbara

State: CA Zip Code: 93117 Phone No. : (800) 866-1144 ext. 1636

Acting on behalf of the above named firm, as its Authorized Official, I make the following Certification to the Department of Housing and Urban Development (HUD) and the Community Development Commission, County of Los Angeles:

- 1) No Federal appropriated funds have been paid, by or on behalf of the above named firm to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of and Federal grant, loan or cooperative agreement, and any extension, continuation, renewal, amendment, or modification thereof, and;
- 2) If any funds other than Federal appropriated funds have paid or will be paid to any person for influencing or attempting to influence an officer or employee or any agency, a Member of Congress an officer or employee of Congress or an employee of a Member of Congress in connection with this Federal contract, grant loan, or cooperative agreement, the above named firm shall complete and submit Standard Form-LLL, "Disclosure Form to Report Lobbying", in accordance with its instructions, and:
- 3) The above name firm shall require that the language of this certification be included in the award documents for all sub-awards at all tiers (including subcontracts, sub-grants, and contracts under grants, loans, and cooperative agreement) and that all sub-recipients shall certify and disclose accordingly.

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into the transaction imposed by Section 1352 Title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

Authorized Official:

Name: Arnold Brier Title: Vice President
Signature:  Date: June 30, 2016



COMMUNITY DEVELOPMENT COMMISSION OF THE COUNTY OF LOS ANGELES

PAYEE REGISTRATION PACKAGE

The Payee Registration Package contains the following documents:

- **Payee Registration form**
- **Organization Registration form**
- **Request for Taxpayer Identification Number and Certification (form W-9)**
- **Direct Deposit enrollment form**

These forms must be included in solicitation packages under “Required Forms.” Vendors must complete and submit these forms as part of their quotes, bids, or proposals.

This is not a Vendor Application Package. Vendors who wish to be included in the Commission’s vendor database and be notified of contracting opportunities must register on-line at www.lacdc.org under “Doing Business With Us.”




Community Development Commission of the County of Los Angeles

Payee Registration

To ensure accurate and prompt payment, please provide all information and return with the organization information form, authorization for direct deposit form and W-9 form to:

COMMUNITY DEVELOPMENT COMMISSION
ATTN: PROCUREMENT UNIT
700 WEST MAIN ST • ALHAMBRA CA 91801
PHONE: (626) 586-1681 • FAX: (626) 943-3807

New Payee Update of Company's Information

Name of Company: <u>Yardi Systems, Inc.</u>					
Contact Person: <u>Jeff Bischoff</u>		Title: <u>Senior Sales Executive, Public Housing</u>			
Company Address: <u>430 South Fairview Ave, Santa Barbara, CA 93117-3637</u>					
(P.O. Box will not be accepted)	Street	City	State	Zip + 4	
Billing Address/Remit To: _____					
(if different from above)	Street	City	State	Zip + 4	
Phone Number (<u>800</u>) <u>866-1144 x1636</u>		Fax Number (<u>805</u>) <u>699-2041</u>		Email: <u>Jeff.Bischoff@yardi.com</u>	
<input checked="" type="checkbox"/> Federal I.D. No.	<input type="checkbox"/> Social Security No.	<input type="checkbox"/> Federal Non-Profit No. (Attach copy of IRS Section 501(c)(3) Non-Profit letter)			
Please print Federal I.D., Social Security or Federal Non-Profit No: <u>77-0049051</u>					
TYPE OF OWNERSHIP (check all applicable)					
<input type="checkbox"/> Sole Proprietorship	<input type="checkbox"/> Partnership	<input checked="" type="checkbox"/> Corporation	<input type="checkbox"/> Non-Profit	<input type="checkbox"/> Franchise	<input type="checkbox"/> Limited Liability Company
<input type="checkbox"/> Other _____					
TYPE OF BUSINESS (check all applicable)					
<input checked="" type="checkbox"/> Manufacturer	<input checked="" type="checkbox"/> Distributor	<input type="checkbox"/> Construction Contractor	<input checked="" type="checkbox"/> Consultant	<input type="checkbox"/> Broker/Agent	<input checked="" type="checkbox"/> Vendor
<input type="checkbox"/> Other _____					
THE INFORMATION PROVIDED IS HEREBY TRUE AND ACCURATE BASED ON FACTS AVAILABLE AS OF THIS DATE.					
Signature 		Title <u>Vice President</u>		Date <u>June 30, 2016</u>	
(Application is NOT valid unless signed and dated.)					
FOR OFFICE USE ONLY					
Date Received: _____		Date Entered: _____			
Payee #: _____		Entered By: _____			

Community Development Commission of the County of Los Angeles

Organization Information Form

I. FIRM/ORGANIZATION INFORMATION Contractors/Vendors are selected without regard to race/ethnicity, color, religion, sex, national origin, age, marital status or disability.

NAME OF FIRM: Yardi Systems, Inc.

Business Structure: Sole Proprietorship Partnership Corporation Non-Profit
 Franchise Other (Please Specify) _____

Total Number of Employees (including owners): 2,608

Distribute the above total number of employees into the following categories:

Race/Ethnic Composition	Owners/Partners/ Associate Partners		Managers		Staff	
	Male	Female	Male	Female	Male	Female
African American						
Hispanic American						
Asian American						
Asian Pacific American						
Native American						
Caucasian						
Other <u>Two or more races</u>						

II. MINORITY OR WOMEN-OWNED BUSINESS ENTERPRISE REPRESENTATION

This firm/organization:

is a Minority Business Enterprise.

"Minority Business Enterprise," as used in this provision means an independent business concern which is at least 51 percent owned by one or more minority group members; or, in the case of a publicly owned business, at least 51 percent of its voting stock is owned by one or more minority group members; and whose management and daily operations are controlled by one or more such individuals.

is a Woman Business Enterprise.

"Woman Business Enterprise," as used in this provision, means an independent business concern which is at least 51 percent owned by one or more women who are U.S. citizens; or, in the case of a publicly owned business, at least 51 percent of its voting stock is owned by one or more women; and whose management and daily operations are controlled by one or more women.

is not a Minority or Woman Business Enterprise.

III. DECLARATION

I declare under penalty of perjury under the laws of the state of California that the above information is true and accurate. I understand that the Commission reserves the right to audit the above information at any time and that I will notify the Commission if there are any changes in this firm's ownership from what is stated on this form.

Print Authorized Name Arnold Brier	Authorized Signature 	Title Vice President	Date 06/30/2016
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Brian J. Stiger
Director

**COUNTY OF LOS ANGELES
DEPARTMENT OF
CONSUMER AND BUSINESS AFFAIRS**

Members of the Board

Hilda L. Solis
Mark Ridley-Thomas
Sheila Kuehl
Don Knabe
Michael D. Antonovich

"To Enrich Lives Through Effective and Caring Service"

March 17, 2015

**CBE Program ID #: 83227
Status: MBE**

Mr. Anant Yardi, President
Yardi Systems, Inc.
430 S. Fairview Avenue
Goleta, CA 93117

Dear Mr. Yardi:

Congratulations! Your firm has been recertified as an eligible participant in the County of Los Angeles Community Business Enterprise (CBE) Program. This recertification is valid until March 11, 2017.

The County of Los Angeles Department of Consumer and Business Affairs reserves the right to request additional information and/or conduct an on-site visit at any time to verify any documentation submitted by the applicant. If there are any changes during this recertification period, you are required to notify the Small Business Assistance office immediately.

Thank you for registering your business with the County's Vendor Registration website (WebVen) at <http://camisvr.co.la.ca.us/webven>. You are now eligible to participate in the County's on-line access to open bids, be placed on bid lists generated by County departments looking for prospective vendors and periodically be notified automatically via email of County bids by specific commodities/services.

Again, congratulations on your recertification. If you have questions, please call (877) 669-CBES or email us at cbesbe@dca.lacounty.gov and refer to the identification number above.

Sincerely,

BRIAN J. STIGER
DIRECTOR

 DEBBIE CABREIRA-JOHNSON
Chief, Small Business

BJS:DCJ/ct

Consumer Services
500 W. Temple Street, Room B-96 • Los Angeles, CA 90012-2706
Telephone (800) 593-8222 • (213) 974-1452
Fax (213) 687-1137 • Website: dca.lacounty.gov

Small Business Assistance
1100 North Eastern Ave, Los Angeles, CA 90063
Telephone (323) 881-3964
Fax (323) 4158521 • Website: osb.lacounty.gov

Request for Taxpayer Identification Number and Certification

**Give form to the
requester. Do not
send to the IRS.**

Print or type See Specific Instructions on page 2.	Name (as shown on your income tax return) Yardi Systems, Inc.	
	Business name, if different from above	
	Check appropriate box: <input type="checkbox"/> Individual/Sole proprietor <input checked="" type="checkbox"/> Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Limited liability company. Enter the tax classification (D=disregarded entity, C=corporation, P=partnership) ▶ <input type="checkbox"/> Exempt payee <input type="checkbox"/> Other (see instructions) ▶	
	Address (number, street, and apt. or suite no.) 430 S. Fairview Avenue	Requester's name and address (optional)
	City, state, and ZIP code Santa Barbara, CA 93117	
List account number(s) here (optional)		

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on Line 1 to avoid backup withholding. For individuals, this is your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN* on page 3.

Note. If the account is in more than one name, see the chart on page 4 for guidelines on whose number to enter.

Social security number : :	or
Employer identification number 77 : 0049051	

Part II Certification

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and
- 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. citizen or other U.S. person (defined below).

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the Certification, but you must provide your correct TIN. See the instructions on page 4.

Sign Here	Signature of U.S. person ▶	Date ▶ June 30, 2016
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General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Purpose of Form

A person who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) to report, for example, income paid to you, real estate transactions, mortgage interest you paid, acquisition or abandonment of secured property, cancellation of debt, or contributions you made to an IRA.

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN to the person requesting it (the requester) and, when applicable, to:

- Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
- Certify that you are not subject to backup withholding, or
- Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income.

Note. If a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.

Definition of a U.S. person. For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien,
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States,
- An estate (other than a foreign estate), or
- A domestic trust (as defined in Regulations section 301.7701-7).

Special rules for partnerships. Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax on any foreign partners' share of income from such business. Further, in certain cases where a Form W-9 has not been received, a partnership is required to presume that a partner is a foreign person, and pay the withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partnership to establish your U.S. status and avoid withholding on your share of partnership income.

The person who gives Form W-9 to the partnership for purposes of establishing its U.S. status and avoiding withholding on its allocable share of net income from the partnership conducting a trade or business in the United States is in the following cases:

- The U.S. owner of a disregarded entity and not the entity,

- The U.S. grantor or other owner of a grantor trust and not the trust, and
- The U.S. trust (other than a grantor trust) and not the beneficiaries of the trust.

Foreign person. If you are a foreign person, do not use Form W-9. Instead, use the appropriate Form W-8 (see Publication 515, Withholding of Tax on Nonresident Aliens and Foreign Entities).

Nonresident alien who becomes a resident alien. Generally, only a nonresident alien individual may use the terms of a tax treaty to reduce or eliminate U.S. tax on certain types of income. However, most tax treaties contain a provision known as a “saving clause.” Exceptions specified in the saving clause may permit an exemption from tax to continue for certain types of income even after the payee has otherwise become a U.S. resident alien for tax purposes.

If you are a U.S. resident alien who is relying on an exception contained in the saving clause of a tax treaty to claim an exemption from U.S. tax on certain types of income, you must attach a statement to Form W-9 that specifies the following five items:

1. The treaty country. Generally, this must be the same treaty under which you claimed exemption from tax as a nonresident alien.
2. The treaty article addressing the income.
3. The article number (or location) in the tax treaty that contains the saving clause and its exceptions.
4. The type and amount of income that qualifies for the exemption from tax.
5. Sufficient facts to justify the exemption from tax under the terms of the treaty article.

Example. Article 20 of the U.S.-China income tax treaty allows an exemption from tax for scholarship income received by a Chinese student temporarily present in the United States. Under U.S. law, this student will become a resident alien for tax purposes if his or her stay in the United States exceeds 5 calendar years. However, paragraph 2 of the first Protocol to the U.S.-China treaty (dated April 30, 1984) allows the provisions of Article 20 to continue to apply even after the Chinese student becomes a resident alien of the United States. A Chinese student who qualifies for this exception (under paragraph 2 of the first protocol) and is relying on this exception to claim an exemption from tax on his or her scholarship or fellowship income would attach to Form W-9 a statement that includes the information described above to support that exemption.

If you are a nonresident alien or a foreign entity not subject to backup withholding, give the requester the appropriate completed Form W-8.

What is backup withholding? Persons making certain payments to you must under certain conditions withhold and pay to the IRS 28% of such payments. This is called “backup withholding.” Payments that may be subject to backup withholding include interest, tax-exempt interest, dividends, broker and barter exchange transactions, rents, royalties, nonemployee pay, and certain payments from fishing boat operators. Real estate transactions are not subject to backup withholding.

You will not be subject to backup withholding on payments you receive if you give the requester your correct TIN, make the proper certifications, and report all your taxable interest and dividends on your tax return.

Payments you receive will be subject to backup withholding if:

1. You do not furnish your TIN to the requester,
2. You do not certify your TIN when required (see the Part II instructions on page 3 for details),
3. The IRS tells the requester that you furnished an incorrect TIN,

4. The IRS tells you that you are subject to backup withholding because you did not report all your interest and dividends on your tax return (for reportable interest and dividends only), or

5. You do not certify to the requester that you are not subject to backup withholding under 4 above (for reportable interest and dividend accounts opened after 1983 only).

Certain payees and payments are exempt from backup withholding. See the instructions below and the separate Instructions for the Requester of Form W-9.

Also see *Special rules for partnerships* on page 1.

Penalties

Failure to furnish TIN. If you fail to furnish your correct TIN to a requester, you are subject to a penalty of \$50 for each such failure unless your failure is due to reasonable cause and not to willful neglect.

Civil penalty for false information with respect to withholding. If you make a false statement with no reasonable basis that results in no backup withholding, you are subject to a \$500 penalty.

Criminal penalty for falsifying information. Willfully falsifying certifications or affirmations may subject you to criminal penalties including fines and/or imprisonment.

Misuse of TINs. If the requester discloses or uses TINs in violation of federal law, the requester may be subject to civil and criminal penalties.

Specific Instructions

Name

If you are an individual, you must generally enter the name shown on your income tax return. However, if you have changed your last name, for instance, due to marriage without informing the Social Security Administration of the name change, enter your first name, the last name shown on your social security card, and your new last name.

If the account is in joint names, list first, and then circle, the name of the person or entity whose number you entered in Part I of the form.

Sole proprietor. Enter your individual name as shown on your income tax return on the “Name” line. You may enter your business, trade, or “doing business as (DBA)” name on the “Business name” line.

Limited liability company (LLC). Check the “Limited liability company” box only and enter the appropriate code for the tax classification (“D” for disregarded entity, “C” for corporation, “P” for partnership) in the space provided.

For a single-member LLC (including a foreign LLC with a domestic owner) that is disregarded as an entity separate from its owner under Regulations section 301.7701-3, enter the owner’s name on the “Name” line. Enter the LLC’s name on the “Business name” line.

For an LLC classified as a partnership or a corporation, enter the LLC’s name on the “Name” line and any business, trade, or DBA name on the “Business name” line.

Other entities. Enter your business name as shown on required federal tax documents on the “Name” line. This name should match the name shown on the charter or other legal document creating the entity. You may enter any business, trade, or DBA name on the “Business name” line.

Note. You are requested to check the appropriate box for your status (individual/sole proprietor, corporation, etc.).

Exempt Payee

If you are exempt from backup withholding, enter your name as described above and check the appropriate box for your status, then check the “Exempt payee” box in the line following the business name, sign and date the form.

Generally, individuals (including sole proprietors) are not exempt from backup withholding. Corporations are exempt from backup withholding for certain payments, such as interest and dividends.

Note. If you are exempt from backup withholding, you should still complete this form to avoid possible erroneous backup withholding.

The following payees are exempt from backup withholding:

1. An organization exempt from tax under section 501(a), any IRA, or a custodial account under section 403(b)(7) if the account satisfies the requirements of section 401(f)(2),
2. The United States or any of its agencies or instrumentalities,
3. A state, the District of Columbia, a possession of the United States, or any of their political subdivisions or instrumentalities,
4. A foreign government or any of its political subdivisions, agencies, or instrumentalities, or
5. An international organization or any of its agencies or instrumentalities.

Other payees that may be exempt from backup withholding include:

6. A corporation,
7. A foreign central bank of issue,
8. A dealer in securities or commodities required to register in the United States, the District of Columbia, or a possession of the United States,
9. A futures commission merchant registered with the Commodity Futures Trading Commission,
10. A real estate investment trust,
11. An entity registered at all times during the tax year under the Investment Company Act of 1940,
12. A common trust fund operated by a bank under section 584(a),
13. A financial institution,
14. A middleman known in the investment community as a nominee or custodian, or
15. A trust exempt from tax under section 664 or described in section 4947.

The chart below shows types of payments that may be exempt from backup withholding. The chart applies to the exempt payees listed above, 1 through 15.

IF the payment is for . . .	THEN the payment is exempt for . . .
Interest and dividend payments	All exempt payees except for 9
Broker transactions	Exempt payees 1 through 13. Also, a person registered under the Investment Advisers Act of 1940 who regularly acts as a broker
Barter exchange transactions and patronage dividends	Exempt payees 1 through 5
Payments over \$600 required to be reported and direct sales over \$5,000 ¹	Generally, exempt payees 1 through 7

¹ See Form 1099-MISC, Miscellaneous Income, and its instructions.

² However, the following payments made to a corporation (including gross proceeds paid to an attorney under section 6045(f), even if the attorney is a corporation) and reportable on Form 1099-MISC are not exempt from backup withholding: medical and health care payments, attorneys' fees, and payments for services paid by a federal executive agency.

Part I. Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. If you are a resident alien and you do not have and are not eligible to get an SSN, your TIN is your IRS individual taxpayer identification number (ITIN). Enter it in the social security number box. If you do not have an ITIN, see *How to get a TIN* below.

If you are a sole proprietor and you have an EIN, you may enter either your SSN or EIN. However, the IRS prefers that you use your SSN.

If you are a single-member LLC that is disregarded as an entity separate from its owner (see *Limited liability company (LLC)* on page 2), enter the owner's SSN (or EIN, if the owner has one). Do not enter the disregarded entity's EIN. If the LLC is classified as a corporation or partnership, enter the entity's EIN.

Note. See the chart on page 4 for further clarification of name and TIN combinations.

How to get a TIN. If you do not have a TIN, apply for one immediately. To apply for an SSN, get Form SS-5, Application for a Social Security Card, from your local Social Security Administration office or get this form online at www.ssa.gov. You may also get this form by calling 1-800-772-1213. Use Form W-7, Application for IRS Individual Taxpayer Identification Number, to apply for an ITIN, or Form SS-4, Application for Employer Identification Number, to apply for an EIN. You can apply for an EIN online by accessing the IRS website at www.irs.gov/businesses and clicking on Employer Identification Number (EIN) under Starting a Business. You can get Forms W-7 and SS-4 from the IRS by visiting www.irs.gov or by calling 1-800-TAX-FORM (1-800-829-3676).

If you are asked to complete Form W-9 but do not have a TIN, write "Applied For" in the space for the TIN, sign and date the form, and give it to the requester. For interest and dividend payments, and certain payments made with respect to readily tradable instruments, generally you will have 60 days to get a TIN and give it to the requester before you are subject to backup withholding on payments. The 60-day rule does not apply to other types of payments. You will be subject to backup withholding on all such payments until you provide your TIN to the requester.

Note. Entering "Applied For" means that you have already applied for a TIN or that you intend to apply for one soon.

Caution: A disregarded domestic entity that has a foreign owner must use the appropriate Form W-8.

Part II. Certification

To establish to the withholding agent that you are a U.S. person, or resident alien, sign Form W-9. You may be requested to sign by the withholding agent even if items 1, 4, and 5 below indicate otherwise.

For a joint account, only the person whose TIN is shown in Part I should sign (when required). Exempt payees, see *Exempt Payee* on page 2.

Signature requirements. Complete the certification as indicated in 1 through 5 below.

1. Interest, dividend, and barter exchange accounts opened before 1984 and broker accounts considered active during 1983. You must give your correct TIN, but you do not have to sign the certification.

2. Interest, dividend, broker, and barter exchange accounts opened after 1983 and broker accounts considered inactive during 1983. You must sign the certification or backup withholding will apply. If you are subject to backup withholding and you are merely providing your correct TIN to the requester, you must cross out item 2 in the certification before signing the form.

3. Real estate transactions. You must sign the certification. You may cross out item 2 of the certification.

4. Other payments. You must give your correct TIN, but you do not have to sign the certification unless you have been notified that you have previously given an incorrect TIN. "Other payments" include payments made in the course of the requester's trade or business for rents, royalties, goods (other than bills for merchandise), medical and health care services (including payments to corporations), payments to a nonemployee for services, payments to certain fishing boat crew members and fishermen, and gross proceeds paid to attorneys (including payments to corporations).

5. Mortgage interest paid by you, acquisition or abandonment of secured property, cancellation of debt, qualified tuition program payments (under section 529), IRA, Coverdell ESA, Archer MSA or HSA contributions or distributions, and pension distributions. You must give your correct TIN, but you do not have to sign the certification.

Secure Your Tax Records from Identity Theft

Identity theft occurs when someone uses your personal information such as your name, social security number (SSN), or other identifying information, without your permission, to commit fraud or other crimes. An identity thief may use your SSN to get a job or may file a tax return using your SSN to receive a refund.

To reduce your risk:

- Protect your SSN,
- Ensure your employer is protecting your SSN, and
- Be careful when choosing a tax preparer.

Call the IRS at 1-800-829-1040 if you think your identity has been used inappropriately for tax purposes.

Victims of identity theft who are experiencing economic harm or a system problem, or are seeking help in resolving tax problems that have not been resolved through normal channels, may be eligible for Taxpayer Advocate Service (TAS) assistance. You can reach TAS by calling the TAS toll-free case intake line at 1-877-777-4778 or TTY/TDD 1-800-829-4059.

Protect yourself from suspicious emails or phishing schemes. Phishing is the creation and use of email and websites designed to mimic legitimate business emails and websites. The most common act is sending an email to a user falsely claiming to be an established legitimate enterprise in an attempt to scam the user into surrendering private information that will be used for identity theft.

The IRS does not initiate contacts with taxpayers via emails. Also, the IRS does not request personal detailed information through email or ask taxpayers for the PIN numbers, passwords, or similar secret access information for their credit card, bank, or other financial accounts.

If you receive an unsolicited email claiming to be from the IRS, forward this message to phishing@irs.gov. You may also report misuse of the IRS name, logo, or other IRS personal property to the Treasury Inspector General for Tax Administration at 1-800-366-4484. You can forward suspicious emails to the Federal Trade Commission at: spam@uce.gov or contact them at www.consumer.gov/idtheft or 1-877-IDTHEFT(438-4338).

Visit the IRS website at www.irs.gov to learn more about identity theft and how to reduce your risk.

What Name and Number To Give the Requester

For this type of account:	Give name and SSN of:
1. Individual	The individual
2. Two or more individuals (joint account)	The actual owner of the account or, if combined funds, the first individual on the account ¹
3. Custodian account of a minor (Uniform Gift to Minors Act)	The minor ²
4. a. The usual revocable savings trust (grantor is also trustee)	The grantor-trustee ¹
b. So-called trust account that is not a legal or valid trust under state law	The actual owner ¹
5. Sole proprietorship or disregarded entity owned by an individual	The owner ³
For this type of account:	Give name and EIN of:
6. Disregarded entity not owned by an individual	The owner
7. A valid trust, estate, or pension trust	Legal entity ⁴
8. Corporate or LLC electing corporate status on Form 8832	The corporation
9. Association, club, religious, charitable, educational, or other tax-exempt organization	The organization
10. Partnership or multi-member LLC	The partnership
11. A broker or registered nominee	The broker or nominee
12. Account with the Department of Agriculture in the name of a public entity (such as a state or local government, school district, or prison) that receives agricultural program payments	The public entity

¹ List first and circle the name of the person whose number you furnish. If only one person on a joint account has an SSN, that person's number must be furnished.

² Circle the minor's name and furnish the minor's SSN.

³ You must show your individual name and you may also enter your business or "DBA" name on the second name line. You may use either your SSN or EIN (if you have one), but the IRS encourages you to use your SSN.

⁴ List first and circle the name of the trust, estate, or pension trust. (Do not furnish the TIN of the personal representative or trustee unless the legal entity itself is not designated in the account title.) Also see *Special rules for partnerships* on page 1.

Note. If no name is circled when more than one name is listed, the number will be considered to be that of the first name listed.

Privacy Act Notice

Section 6109 of the Internal Revenue Code requires you to provide your correct TIN to persons who must file information returns with the IRS to report interest, dividends, and certain other income paid to you, mortgage interest you paid, the acquisition or abandonment of secured property, cancellation of debt, or contributions you made to an IRA, or Archer MSA or HSA. The IRS uses the numbers for identification purposes and to help verify the accuracy of your tax return. The IRS may also provide this information to the Department of Justice for civil and criminal litigation, and to cities, states, the District of Columbia, and U.S. possessions to carry out their tax laws. We may also disclose this information to other countries under a tax treaty, to federal and state agencies to enforce federal nontax criminal laws, or to federal law enforcement and intelligence agencies to combat terrorism.

You must provide your TIN whether or not you are required to file a tax return. Payers must generally withhold 28% of taxable interest, dividend, and certain other payments to a payee who does not give a TIN to a payer. Certain penalties may also apply.

Appendices

The following pages contain supplemental information related to our proposal.

Appendix I. Certificate of Insurance (Confidential)

Yardi acknowledges HCoLA's insurance requirements identified in the RFP. On the following pages is our current certificate of insurance for your information. We request that HCoLA treat this information as confidential under the Public Records Act as permitted under paragraph 1.14 of the RFP.



CERTIFICATE OF LIABILITY INSURANCE

DATE(MM/DD/YYYY)
11/02/2015

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Aon Risk Insurance Services West, Inc. Los Angeles CA Office 707 Wilshire Boulevard Suite 2600 Los Angeles CA 90017-0460 USA	CONTACT NAME: PHONE (A/C. No. Ext): (866) 283-7122 FAX (A/C. No.): (800) 363-0105		
	E-MAIL ADDRESS:		
INSURED Yardi Systems, Inc. 430 South Fairview Avenue Santa Barbara CA 93117 USA	INSURER(S) AFFORDING COVERAGE		NAIC #
	INSURER A: Atlantic Specialty Insurance Company		27154
	INSURER B:		
	INSURER C:		
	INSURER D:		
	INSURER E:		
INSURER F:			

Holder Identifier :

COVERAGES **CERTIFICATE NUMBER:** 570059989002 **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS. **Limits shown are as requested**

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input checked="" type="checkbox"/> LOC OTHER:			[REDACTED]	11/01/2015	11/01/2016	EACH OCCURRENCE DAMAGE TO RENTED PREMISES (Ea occurrence) MED EXP (Any one person) PERSONAL & ADV INJURY GENERAL AGGREGATE PRODUCTS - COMP/OP AGG
A	AUTOMOBILE LIABILITY <input checked="" type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS			[REDACTED]	11/01/2015	11/01/2016	COMBINED SINGLE LIMIT (Ea accident) BODILY INJURY (Per person) BODILY INJURY (Per accident) PROPERTY DAMAGE (Per accident)
	<input type="checkbox"/> UMBRELLA LIAB <input type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> DED <input type="checkbox"/> RETENTION			[REDACTED]			EACH OCCURRENCE AGGREGATE
A	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR / PARTNER / EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below			[REDACTED]	11/01/2015	11/01/2016	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTHER E.L. EACH ACCIDENT E.L. DISEASE-EA EMPLOYEE E.L. DISEASE-POLICY LIMIT
				[REDACTED]			

Certificate No :

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

CERTIFICATE HOLDER Yardi Systems, Inc. 430 South Fairview Avenue Santa Barbara CA 93117 USA	CANCELLATION SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE <i>Aon Risk Insurance Services West, Inc.</i>
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AGENCY CUSTOMER ID: [REDACTED]

LOC #:

ADDITIONAL REMARKS SCHEDULE

Page _ of _

AGENCY Aon Risk Insurance Services West, Inc.		NAMED INSURED Yardi Systems, Inc.	
POLICY NUMBER See Certificate Number: [REDACTED]			
CARRIER See Certificate Number: [REDACTED]	NAIC CODE	EFFECTIVE DATE:	

ADDITIONAL REMARKS

**THIS ADDITIONAL REMARKS FORM IS A SCHEDULE TO ACORD FORM,
FORM NUMBER: ACORD 25 FORM TITLE: Certificate of Liability Insurance**

Named Insureds

YARDI SYSTEMS INC .
 TORRIDON LLC
 JASKE TRUST OWNS ONLY YARDI PROPERTIES .
 RCASH INC MANAGEMENT, PAYABLES
 PROCESSING, AND ELECTRONIC FUNDS
 MULTI-HOUSING NEWS AND COMMERCIAL
 PROPERTY EXECUTIVE
 RENTGROW INC
 YES ENERGY MANAGEMENT INC [FORMERLY
 KNOWN AS ENERGY BILLING SYSTEMS
 INC/ENERGY BILLING SERVICES} VISUAL
 HOMES
 DIY REAL ESTATE
 PROPERTYSHARK
 SITESTUFF INC
 RENT CAFE
 HUD HOMESTORE
 SCREENING WORKS
 REEPCO (DBA REALTOWN AND
 Internet Crusade)
 ALMSA INC
 CLIENT ACCOUNTING SERVICES
 LEAD TRACKING SOLUTIONS
 POPCARD
 YES MULTIFAMILY INC (NAME CHANGE FOR
 ISTA MULTIFAMILY INC)
 YARDI RESIDENT SCREENING
 COROWA LLC
 ISTA MULTIFAMILY INC
 YES ENERGY MANAGEMENT INC .
 30 COROWA LLC 2
 PIERCE-EISLEN INC
 CENTERSHIFT
 ENERLIANCE, INC
 POINT2 MANAGERS
 POINT2 TECHNOLOGIES