



REQUEST FOR PROPOSALS

FOR

CLOUD-BASED DOCUMENT MANAGEMENT & WORKFLOW AUTOMATION SOFTWARE SOLUTION

SUBMISSION DATE: APRIL 20, 2026

2:00 P.M. CST

**CORPUS CHRISTI HOUSING AUTHORITY & COASTAL
HOUSING PARTNERS**

RFP No. 26022

Prepared by:

**Corpus Christi Housing Authority & Coastal Housing Partners
3701 Ayers Street
Corpus Christi, TX 78415**

ISSUED: MARCH 19, 2026

**Request For Proposal (RFP) 26022,
Cloud-Based Document Management & Workflow Automation Software Solution**

**REQUEST FOR PROPOSALS (RFP) No. 26022
Cloud-Based Document Management & Workflow Automation Software
Solution**

Attachment A

DATE ISSUED	March 19, 2026
QUESTIONS SUBMITTAL DEADLINE	April 09, 2026
PROPOSAL SUBMITTAL RETURN AND DEADLINE	April 20, 2026, at 2:00 P.M. CST Corpus Christi Housing Authority 3701 Ayers Street Corpus Christi, TX 78415
AGENCY CONTACT PERSON	Rose Mary Khosrowsalafi rosemary.k@hacc.org (361) 889-3373

One (1) original and one (1) copy of the Sealed Proposal are due by Thursday, April 20, 2026, at 2:00 P.M. CST. Deliver or hand carry to the Corpus Christi Housing Authority, 3701 Ayers, Corpus Christi, TX 78415 (Front Window).

1. All work performed must meet all electrical, mechanical, and building codes based on local, state, and federal regulations.
2. All questions must be in writing and emailed to procurement@hacc.org by April 9, 2026. After that date, questions will not be accepted.

Signature and submission of this Proposal shall serve as evidence that the Contractor understands and agrees to all conditions of the Request for Proposals – RFP 26022.

Company Name: _____

Authorized Representative: _____ (Print Name) _____ (Title)

Signature: _____

Address: _____

Phone Number: _____ Email: _____

Date: _____

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- 1.0 THE AGENCY’S RESERVATION OF RIGHTS.** The Agency reserves the right to:
- 1.1 Right to Reject, Waive, or Terminate the Solicitation.** Reject any or all proposals, waive any informality in the RFP process, or terminate the RFP process at any time, if deemed by the Agency to be in its best interests.
 - 1.2 Right to Not Award.** Not to award a contract pursuant to this RFP.
 - 1.3 Right to Terminate.** Terminate a contract awarded pursuant to this RFP, at any time for its convenience, upon 60 days’ written notice to the successful proposer(s).
 - 1.4 Right to Determine Time and Location.** Determine the days, hours, and locations that the successful proposer(s) shall provide the services called for in this RFP.
 - 1.5 Right to Retain Proposals.** Retain all proposals submitted and not permit withdrawal for a period of 30 days subsequent to the deadline for receiving proposals without the written consent of the Agency Contracting Officer (CO).
 - 1.6 Right to Negotiate.** Negotiate the fees proposed by the proposer entity.
 - 1.7 Right to Reject any Proposal.** Reject and do not consider any proposal that does not meet the requirements of this RFP, including but not necessarily limited to incomplete proposals and/or proposals offering alternate or non-requested services.
 - 1.8 No Obligation to Compensate.** Have no obligation to compensate any proposer for any costs incurred in responding to this RFP.
 - 1.9 Right to Prohibit.** At any time during the RFP or contract process to prohibit any further participation by a proposer or reject any proposal submitted that does not conform to any of the requirements detailed herein.

2.0 SCOPE OF WORK (SOW) / TECHNICAL SPECIFICATIONS

Cloud-Based Document Management & Workflow Automation Software Solution

The Corpus Christi Housing Authority (hereinafter referred to as “CCHA”) is soliciting competitive proposals from qualified, licensed, and insured firms to provide a comprehensive Cloud-Based Document Management & Workflow Automation Software Solution to create process and efficiency around all aspects of documentation within the Corpus Christi Housing Authority. The proposed system requires secure, efficient, and compliant management of records, forms, and workflows across departments (e.g., Finance, Human Resources, Procurement, Maintenance, Compliance, HCV [Housing Choice Vouchers] and Property Management) and provides seamless integration with CCHA’s existing systems.

The selected software solution will include configuration, implementation services, data migration, training, documentation, and ongoing support with live agents when necessary.

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2.1 Background

The Corpus Christi Housing Authority (CCHA) provides safe, affordable housing to low-income families, seniors, and individuals with disabilities throughout the City of Corpus Christi and surrounding service areas. CCHA administers a diverse portfolio of affordable housing programs, including approximately 2,200 multifamily units, which consist of former public housing units converted through the Rental Assistance Demonstration (RAD) program, tax credit properties, and single-family homes. In addition, CCHA administers 1,700 tenant-based Housing Choice Vouchers (HCV), with these programs collectively serving 3,900 households each month.

CCHA currently utilizes FileVision for managing documents and workflows. To meet increasing demands and improve accessibility and efficiency, CCHA seeks to modernize its document and workflow solutions through an intelligent Cloud-Based Document Management & Workflow Automation Software Solution

2.2 Objectives

The primary objectives of this procurement are:

- A Cloud-based SaaS solution only (no on-prem or self-hosted alternatives). Vendors must provide fully managed hosting, updates, scaling, monitoring, and security.
- Software licenses/subscriptions and hosting in a secure, U.S.-based cloud environment.
- Discovery, design, configuration, and testing of prioritized workflows.
- Records management (retention schedules, legal hold, disposition workflow, audit logs).
- Role-based security, SSO, and access controls.
- Integration with Yardi and Microsoft 365, including API-based data exchange.
- Migration of agreed legacy repositories (network shares, FileVision, SharePoint libraries, email PSTs).
- AI-powered search capabilities that intelligently analyze document content and images, enabling semantic and contextual search and visual recognition, with traditional indexing, metadata, and OCR-based search included as secondary supporting functionality.
- To support comprehensive document capture through multiple input methods, including scanning, direct file import, email ingestion, and other applicable electronic or automated intake mechanisms, to ensure efficient and flexible document intake across the organization.

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2.3 Functional Requirements

2.3.1 Core Capability Requirements

Vendors must demonstrate that the proposed solution meets the following essential capability areas, which represent the CCHA's functional, operational, and strategic needs:

1. Cloud-First Deployment – System provides secure, scalable, cloud-based access with no local servers required.
2. Security & Access Control – Encryption in transit and at rest; role-based permissions; MFA support.
3. Compliance Workflow Integration – Ability to embed Agency-specific approval, retention, and regulatory workflows.
4. Audit Readiness – Automated tracking of approvals, retention, and required documentation.
5. Intelligent Search & Knowledge Discovery – AI-powered semantic search, relevance ranking, and related-content detection.
6. Intelligent Workflow Automation – Auto-filing, metadata suggestions, required-attachment validation.
7. SOP & Policy Integration – Ability to tie Agency SOPs and policies directly into workflows and tasking.
8. Advanced Enterprise Search – Natural language search with AI surfacing related content and historical context.
9. Open API for Integrations – Flexible API layer for integration with existing systems, portals, and future applications.
10. Flexible Metadata & Document Typing – Agency-definable metadata fields and document-type requirements.
11. Version Control & History – Full, immutable versioning and change history.
12. Data Migration Support – Secure migration of legacy files and metadata with minimal operational disruption.
13. Mobility & Remote Access – Secure access for uploading, reviewing, and approving documents remotely.
14. Scalability & Future-Proofing – Capacity to expand with Agency growth and adopt future AI/analytics features.
15. Change Management & Training – Vendor-provided onboarding, staff training, and adoption support.
16. Cost Transparency & Predictability – Clear licensing, storage, support, and upgrade pricing.
17. Knowledge Preservation – Support for institutional knowledge capture as staff retire or depart.

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18. Disaster Recovery & Business Continuity – Backup, redundancy, and recovery protocols.
19. Public Sector Specialization – Vendor experience supporting compliance-heavy public sector agencies.

2.3.2 Document Capture & Ingestion

- Multi-channel intake: scanners/MFDs, email ingestion, watched folders, APIs, mobile, web forms.
- OCR/ICR and zonal extraction with confidence scores and exception queues.

2.3.3 Document & Records Management

- Metadata schemas and templates, required fields, conditional logic.
- Version control, check-in/out, rendition management (PDF/A), watermarks.
- Records retention: schedules, holds, evidence of disposition; immutable logs.
- Full-text and metadata search with saved searches and relevancy tuning.

2.3.4 Workflow & Automation

- No/low-code workflow designer (drag-and-drop) with branching, SLAs, timers, escalations.
- Business rules engine; calculated fields; dynamic routing; parallel approvals.
- Tasks and work queues; email/Teams notifications; reminders; reassignment.
- E-signature integration (e.g., DocuSign) with compliant audit trails.

2.3.5 Forms Management

- Web forms and e-forms (mobile responsive) with validation, attachments, and conditional sections.
- Public portals (optional) for submissions with status tracking.

2.3.6 Integration

- Yardi: surface or link documents from resident/vendor/property; push/pull metadata (e.g., resident ID, property, WO #); attach artifacts to transactions when feasible; support nightly or near-real-time sync via APIs/flat files as available.

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- Microsoft 365: SharePoint libraries, Teams tabs, Outlook add-in for filing, OneDrive interop; Azure AD SSO and MFA
- Other: SFTP/REST/Webhooks; open APIs and SDKs for future use; RPA compatibility (optional).

2.3.7 Reporting & Analytics

- Operational dashboards (ingestion volume, SLA compliance, cycle time, backlog, exceptions).
- KPI tracking (e.g., average approval time, straight-through processing rate).
- Export to Excel/Smartsheet/Power BI; scheduled reports and subscriptions.

2.4 Non-Functional Security & Compliance Requirements

- Authentication & IAM: SSO, MFA support, granular RBAC.
- Data Protection: Encryption at rest and in transit; key management practices
- Privacy & Compliance: Support for public sector requirements, PII safeguarding, audit trails, legal hold, and records retention consistent with state/local schedules.
- Availability & Performance: 99.9%+ monthly uptime (excluding scheduled maintenance)
- Logging & Auditing: Immutable audit logs for access, changes, approvals, and disposition actions; exportable.
- Backup & DR: Documented backup frequency, retention, encryption, and restoration testing cadence.
- Interoperability: Standards-based architecture; open file formats (PDF, CSV).

2.5 Implementation Approach & Deliverables

The vendor shall deliver a role-based training program that accommodates varying levels of technical proficiency and job functions, including but not limited to end users, power users, system administrators, records managers, compliance staff, and IT staff.

Training services shall include, at a minimum:

- Assessment of CCHA roles, workflows, and system usage to define appropriate training tracks.
- Role-Based Training Delivery
 - General end users
 - Supervisors and approvers

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- Departmental power users
- System and security administrators
- Records management and compliance staff
- A combination of the following training formats:
 - Live instructor-led
 - Virtual training sessions
 - On-demand recorded training modules
 - Hands-on, scenario-based exercises aligned to CCHA workflows
 - Train-the-trainer sessions to support internal knowledge sustainability
- Vendor shall provide and maintain the following training materials:
 - User manuals and administrator guides
 - Quick-reference guides and job aids
 - Workflow-specific documentation
 - Searchable knowledge base content

All training materials must remain accessible to CCHA throughout the contract term at no additional cost and must be updated as system features evolve.

2.6 Implementation Approach & Deliverables

The vendor shall clearly describe its methodology for implementation, migration, onboarding, and long-term support.

1. Initiation & Discovery: project plan, roles, communication plan, risk log, current-state review.
2. Design: future-state process maps, metadata model, retention mapping, integration design, test plan.
3. Build & Configure: solution configuration, forms, workflows, security model, integrations, migration runbook.
4. Testing: unit, system, security, performance, and user acceptance testing (UAT) with traceability matrix.
5. Training & Change Management: role-based training materials, quick-reference guides, knowledge base.
6. Go-Live & Hypercare: production cutover, issue triage, stabilization (2-4 weeks).
7. Transition to Operations: final documentation, admin handoff, post-implementation review.

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- 3.0 Proposal Submission Requirements:** All proposals must be submitted to the designated Agency office and received with an official timestamp by the specified submittal deadline stated herein, or within the ensuing addendum. Every proposer must submit two versions of their proposal: an original, which should include an authorized signature and be labeled "Original," and a duplicate copy. Both versions should consist of a cover page. Please ensure that both unfolded proposals are placed together in a single sealed envelope and addressed to:

**Corpus Christi Housing Authority
Attention: Procurement Department
RFP 26022 Cloud-Based Document Management & Workflow Automation
Software Solution
3701 Ayers Street
Corpus Christi, TX 78415**

- 3.1 Submission Conditions.** The package exterior must clearly denote the above-noted RFP number and must have the proposer's name and return address. Proposals received after the published deadline will not be accepted.

- 3.2 Proposer's submission package shall consist of the following.**

- 3.2.1 Proposal Cover Sheet**
- 3.2.2 Tab 1 - Functional & Technical Capabilities**
- 3.2.3 Tab 2 - Security, Compliance & Risk**
- 3.2.4 Tab 3 - Implementation Approach & Deliverables**
- 3.2.5 Tab 4 - Integration & Data Migration**
- 3.2.6 Tab 5 - Vendor Experience & Public Sector Fit**
- 3.2.7 Tab 6 - Training, Support & Long-term Value**
- 3.2.8 Tab 7 - Cost & Price Transparency**
- 3.2.9 Tab 8 - Forms**
 - 3.2.9.1 Attachment A**
 - 3.2.9.2 Attachment B**
 - 3.2.9.3 Attachment C**
 - 3.2.9.4 Attachment D**
 - 3.2.9.5 Attachment E**
 - 3.2.9.6 Addenda Issued**

3.3 Proposal Format

Proposals shall be organized using the tab structure outlines in Section 3.2. Proposers shall provide clean, concise narrative responses supported by diagrams, tables, or examples as appropriate.

Where applicable, proposers may reference standard documentation, templates, or sample artifacts in lieu of creating custom documents for this RFP.

- 3.3.1 Tab 1 - Functional & Technical Capabilities**

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Proposers shall describe how the proposed solution meets the functional and technical requirements in Section 2.3.

- 3.3.1.1 Functional Capability Matrix:** A point-by-point response indicating compliance with each requirement in Section 2.3., including notes on configuration, limitations, or dependencies.
- 3.3.1.2 Solution Architecture Overview:** A high-level architecture diagram illustrating major system components, data flow, hosting model, security layers, and integration touchpoints.
- 3.3.1.3 Workflow & Automation Overview:** Narrative and/or screenshots describing how workflows are configured and modified using no-code or low-code tools.
- 3.3.1.4 AI & Intelligent Search Description:** Description of AI capabilities, including document classification, metadata extraction, semantic search, and how AI is embedded within workflows.
- 3.3.1.5 Illustrative Use Cases or Case Studies:** Examples demonstrating how the solution has automated similar processes for comparable organizations.

3.3.2 Tab 2 - Security, Compliance & Risk

Proposers shall describe their security posture and compliance readiness relevant to public-sector environments.

- 3.3.2.1 Security & Compliance Overview:** Summary of security controls, identity and access management approach, encryption practices, logging, and auditability.
- 3.3.2.2 Certifications & Attestations:** Evidence of applicable third-party certification or formal attestation of compliance.
- 3.3.2.3 Risk Management Approach:** Description of how security, operational, and availability risks are identified and mitigated.
- 3.3.2.4 Data Protection & Privacy Controls:** Overview of PII protection, records retention support, legal hold, and audit readiness.

3.3.3 Tab 3 - Implementation Approach & Deliverables

Proposers shall describe their standard methodology for implementation, migration, and onboarding.

- 3.3.3.1 Implementation Methodology:** Description of typical phases and training formats (e.g., discovery, design, configuration, testing, training, go-Live, stabilization).

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- 3.3.3.2 **Project Governance & Risk Management:** Overview of project governance, communications, escalation paths, and risk mitigation practices.
- 3.3.3.3 **Timeline Overview:** A representative high-level timeline for implementation of similar size and complexity.
- 3.3.3.4 **Quality & Acceptance Approach:** Description on how deliverables are validated and accepted.

3.3.4 Tab - 4 - Integration & Data Migration

Proposers shall describe integration capabilities and migration approach.

- 3.3.4.1 **Yardi Integration Overview:** Description of supported integration patterns, data exchange methods, and prior experience integrating with Yardi.
- 3.3.4.2 **Microsoft 365 Integration Overview:** Description of integration with SharePoint, Teams, Outlook, OneDrive, and Azure AD.
- 3.3.4.3 **Data Migration Strategy:** High-level approach to migrating legacy repositories, including validation and risk migration.
- 3.3.4.4 **Relevant Case Examples:** Examples of successful integration or migrations for similar clients.

3.3.5 Tab 5 - Vendor Experience & Public Sector

Proposers shall demonstrate experience, stability, and relevance.

- 3.3.5.1 **Case Studies/Project Profiles:** Detailed descriptions of 3-5 similar projects, specifically highlighting experience with Public Housing Agencies (PHAS), municipal housing departments, or affordable housing providers.
- 3.3.5.2 **Contract/SOW Samples:** Copies of previous Statement of Work (SOW) or contracts showing scope, scale, and successful completion of similar services within the last 3 -5 years.
- 3.3.5.3 **Organization Chart & Key Personnel Resumes:** Documentation demonstrating the experience of the team members who will directly serve the Housing Authority.
- 3.3.5.4 **Reference Letter:** At least three letters from previous clients (preferably government or housing authorities) on company letterhead, signed, and including contract information.
- 3.3.5.5 **Performance Metrics/KPI Data:** Quantitative evidence of success, such as on-time delivery percentages or system uptime records, to prove quality of service.
- 3.3.5.6 **Customer Testimonials:** Documented feedback highlighting client satisfaction with product implementation and customer support.

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- 3.3.5.7 **Financial Statements (Last 3 Years):** Audited financial statements, balance sheet, or letters from accountants demonstrating financial stability.
- 3.3.5.8 **Product Roadmap:** Documentation showing planned future upgrades, R&D investments (e.g., >15% of revenue), and a track record of consistent upgrades.
- 3.3.5.9 **Risk Management Plan:** Documentation of policies regarding data security (e.g., SOC 2 readiness) and business continuity plans.

3.3.6 Training, Support & Long-Term Value

Proposers shall describe their approach to adoption and ongoing support.

- 3.3.6.1 **Training Approach:** Overview of role-based training strategy and delivery formats.
- 3.3.6.2 **Support Model:** Description of support structure, SLAs, escalation, and customer support resources.
- 3.3.6.3 **Customer Success Approach:** Description of ongoing engagement, adoption tracking, and continuous improvement practices.
- 3.3.6.4 **Accessibility Statement:** Statement showing training content adheres to accessible design standards.

3.3.7 Tab 7 - Cost & Pricing Transparency

Proposers shall provide clean, complete pricing information.

- 3.3.7.1 **Itemized Pricing Proposal:** A detailed breakdown of all costs, including software licenses/subscriptions, hardware, implementation, migration, training, support, and optional services, ensuring no hidden fees.
- 3.3.7.2 **Fixed Fee Schedule or Price Cap Document:** A binding document defining price ceilings or fixed rates for the duration of the contract, often for 5 years, to ensure cost stability.
- 3.3.7.3 **Service Level Agreements (SLAs) with Financial Penalties:** Documents linking service quality directly to cost reductions, providing predictable financial outcomes if performance goals are not met.
- 3.3.7.4 **5-Year TCO (Total Cost of Ownership) 5- Year TCO Analysis Worksheet/Spreadsheet:** A detailed financial model covering:
- 3.3.7.5 **Initial Acquisition Costs:** Hardware, software licenses, implementation fees.
- 3.3.7.6 **Operation Costs:** Annual maintenance, support fees. Subscription costs, training, and utilities (if applicable).

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3.3.7.7 End-of-Life/Disposal Costs: Decommissioning or data migration costs.

3.3.7.8 Indirect Cost Analysis: Documentation of cost related to downtime, personnel time for training, and operational inefficiency.

3.3.8 Tab 8- Forms

3.3.8.1 Attachment A

3.3.8.2 Attachment B

3.3.8.3 Attachment C

3.3.8.4 Attachment D

3.3.8.5 Attachment E

3.3.8.6 Addendums

4.0 Proposal Evaluation:

4.1 Proposal Evaluation Process.

4.1.1 An evaluation committee will screen all proposals. The evaluation committee shall screen and rate the submitted responses. The evaluation rating will be on a 100-point scale, and those proposers selected for a short list may be invited to attend an interview at the proposer's own expense. Any invitation to an oral presentation will be solely for the purpose of clarifying proposals received for each qualifying proposer and will not constitute a decision by the evaluation committee on the selection of a successful proposal.

4.1.2 Each proposal received will first be evaluated for responsiveness (e.g., meeting the published minimum requirements). The Agency reserves the right to reject any proposal deemed not minimally responsive (the Agency will notify such firms in writing of any such rejection).

4.1.3 CCHA staff shall recommend an evaluation committee, which will be used to evaluate all proposals. PLEASE NOTE: No proposer shall be informed at any time during or after the RFP process as to the identity of any evaluation committee member. If, by chance, a proposer does become aware of the identity of such person(s), he/she SHALL NOT make any attempt to contact or discuss with such person anything related to this RFP. The CO is the only person at the Agency that the proposers shall contact pertaining to this RFP. Failure to abide by this requirement may (and most likely will) cause such proposer(s) to be eliminated from consideration for award.

During the evaluation process, the proposer may be asked for additional information or clarification of the proposal as needed. The Agency will evaluate all proposals based on the following criteria.

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4.2 Evaluation Criteria:

4.2.1 Functional & Technical Capabilities (20 pts)

- Alignment with Section 2.3 requirements
- Workflow flexibility and AI capabilities
- Records management and audit readiness
- Search and knowledge discovery

4.2.2 Security, Compliance & Risk (15 pts)

- IAM, RBAC, MFA implementation
- Audit logging and retention controls
- Public sector compliance readiness

4.2.3 Implementation Approach & Deliverables (15 pts)

- Clarity and completeness of methodology
- Risk management and governance
- Realistic timeline and staffing model
- Acceptance criteria and traceability

4.2.4 Integration & Data Migration (20 pts)

- Yardi integration depth
- Microsoft 365 integration quality
- Migration approach robustness

4.2.5 Vendor Experience & Public Sector Fit (15 pts)

- Housing Authority or similar experience
- Reference quality
- Long-term product viability

4.2.6 Training, Support & Long-Term Value (5 pts)

- Training quality and accessibility

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- Support model maturity
- Customer success approach

4.2.7 Cost & Pricing Transparency (10 pts)

- Clarity and predictability
- 5-year TCO (Total Cost of Ownership)
- Value relative to functionality

Criteria	Points
Functional & Technical Capabilities	20
Security, Compliance & Risk	15
Implementation Approach & Deliverables	15
Integration & Data Migration	20
Vendor Experience & Public Sector Fit	15
Training, Support & Long-Term Value	5
Cost & Pricing Transparency	10
Total Points	100

- 4.2.8** Pricing and fees will be evaluated based on total cost. The formula used will be the lowest price/proposal being reviewed, price*10.
- 4.2.9** Once proposals are scored, the evaluation team will select finalists and decide whether an interview should be conducted. Each evaluation team member will award each finalist up to 30 points for their oral presentation and can amend proposal scores based on the interview.
- 4.2.10** Proposal and interview scores will be combined, and the highest overall proposal score will be identified. The Agency will then begin contract negotiations with that Proposer.
- 4.2.11** Should negotiation be unsuccessful; the Agency shall enter negotiation with the next highest-ranking vendor. The process shall continue until an agreement is reached with a qualified vendor.

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- 4.2.12 Failure to submit the requested information may result in a determination of non-responsiveness to the solicitation.

5.0 CONTRACT AWARD.

- 5.1 **Contract Award Procedure.** If a contract is awarded pursuant to this RFP, the following detailed procedures will be followed:
- 5.1.1 By completing, executing, and submitting a proposal, the “proposer is thereby agreeing to abide by all terms and conditions pertaining to this RFP as issued by the Agency, either in hard copy or by reference. Accordingly, the Agency has no responsibility to conduct after the submittal deadline any negotiations pertaining to the contract clauses already published.
- 5.2 **Contract Conditions.** The following provisions are considered mandatory conditions of any contract award made by the Agency pursuant to this RFP:
- 5.2.1 **Contract Form.** The Agency will not execute a contract on the successful proposer's form; contracts will only be executed on the Agency form, and by submitting a proposal, the successful proposer agrees to do so (please note that the Agency reserves the right to amend this form as the Agency deems necessary).
- 5.2.2 **Assignment of Personnel.** The Agency shall retain the right to demand and receive a change in personnel assigned to the work if the Agency believes that such a change is in the best interest of the Agency and the completion of the contracted work.
- 5.2.3 **Unauthorized Sub-Contracting Prohibited.** The Contractor shall not assign any right, nor delegate any duty for the work proposed pursuant to this RFP (including, but not limited to, selling or transferring the contract) without the prior written consent of the CO. Any purported assignment of interest or delegation of duty, without the prior written consent of the CO shall be void and may result in the cancellation of the contract with the Agency, or may result in the full or partial forfeiture of funds paid to the Contractor as a result of the proposed contract; either as determined by the CO.
- 5.3 **Contract Period.** One initial year and four one-year options to extend.
- 5.4 **Licensing and Insurance Requirements.** Prior to award (but not as a part of the proposal submission), the *successful proposer* will be required to provide:
- 5.4.1 **Workers' Compensation Insurance.** An original certificate evidencing the proposer's current industrial (workers' compensation) insurance carrier and coverage amount (NOTE: Workers Compensation Insurance will be required

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of any Contractor that has employees other than just the owner working on-site to provide the services);

- 5.4.2 General Liability Insurance.** An original certificate evidencing General Liability coverage, naming the Agency as an additional insured, together with the appropriate endorsement to said policy reflecting the addition of the Agency as an additional insured under said policy (minimum of \$1,000,000 each occurrence, general aggregate minimum limit of \$1,000,000, together with damage to premises and fire damage of \$50,000 and medical expenses any one person of \$5,000), with a maximum deductible amount of \$5,000;
- 5.4.3 Automobile Insurance.** An original certificate showing the proposer's automobile insurance coverage in a combined single limit of \$1,000,000. For every vehicle utilized during the term of this program, when not owned by the entity, each vehicle must have evidence of automobile insurance coverage with limits of no less than \$100,000/\$300,000 and medical pay of \$5,000.
- 5.4.4 City/County/State Business License.** If applicable, a copy of the proposer's business license allowing that entity to provide such services within the City of Corpus Christi, Nueces County, and/or the State of Texas.
- 5.4.5 Certificates.** Regarding the insurance certificates and licenses referenced in Sections 5.4.1 through 5.4.4, each proposer must enter the relevant information in the designated fields on the form. Do not attach or submit copies of insurance certificates or licenses with your proposal; the Agency will obtain these documents from the selected proposer before finalizing the contract.
- 5.5 Right to Negotiate Final Fees.** The Agency shall retain the right to negotiate the amount of fees that are paid to the successful proposer, meaning the fees proposed by the top-rated proposer may, at the Agency's option, be the basis for the beginning of negotiations. Such negotiations shall begin after the Agency has chosen a top-rated proposer. If such negotiations are not, in the opinion of the CO, successfully concluded within 5 business days, the Agency shall retain the right to end such negotiations and begin negotiations with the next-rated proposer. The Agency shall also retain the right to negotiate with and make an award to more than one proposer, as long as such negotiation(s) and/or award(s) are addressed in the above manner (i.e., top-rated first, then next-rated following until a successful negotiation is reached).
- 5.6 Contract Service Standards.** All work performed pursuant to this RFP must conform and comply with all applicable local, state, and federal codes, statutes, laws, and regulations.

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5.7 Prompt Return of Contract Documents. Any and all documents required to complete the contract, including the contract signature by the successful proposer, shall be provided to the Agency within (ten) 10 work days of notification by the Agency.

6.0 Invoicing:

6.1 Invoices. Invoices must contain a complete description of the work or services performed, the contract price for each service, the purchase order number, the contract number (if applicable), the date of service, and the address for service location or delivery. Proposer(s) must submit a separate invoice for each purchase order issued by CCHA unless prior approval is obtained from CCHA. To ensure prompt and timely payment of invoices, and unless utilizing a progress payment schedule, invoices shall be sent electronically to the following address:

CCHAInvoices@yardifs.com

If the Proposer cannot send invoices electronically, they may be mailed to:

**Corpus Christi Housing Authority
Attn: Finance Department
3701 Ayers Street
Corpus Christi, TX 78415**

- 6.2 Progress Payments.** If applicable, CCHA may make progress payments approximately every 30 days as the work proceeds, provided the work meets the owner's standard as approved by the Contracting Officer. CCHA may, subject to the Contracting Officer's written determination and approval, make more frequent payments to qualified small businesses.
- 6.3 Direct Deposit.** Upon the Award of Contract, the Proposer shall complete a direct deposit form to process all payments electronically, ensuring prompt and efficient payment of all invoices.
- 6.4** Contractor shall invoice CCHA within 60 days after delivery of the goods and services. If the contractor fails to invoice within 60 days, CCHA reserves the right not to pay the invoice.

Attachment B General Information Questionnaire

1. Legal Name of Firm: _____
 Address of Principle Office: _____
 Telephone Number: _____ Fax: _____
 Form of Business Organization: _____

2. Identity Principals/Partners in the firm.

Name	Title	% of Ownership

3. Identify the individual(s) that will function as project manager and any other supervisory personnel who will work on the project.

Name	Title	E-mail

4. How many years has your organization been in business in its current capacity?
 5. How many years has our organization been in business under its present name?
 6. Under what other or former names have you operated?
 7. Has your firm or any member of our firm been to a party to litigate with a public entity? If yes, when, with whom, and state the circumstances and any resolution.
 8. Has your firm or any member of your firm ever had a claim brought against it because of breach of contract or nonperformance? If yes, when, and state the circumstances and any resolution of the matter.

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**Company Biography
Attachment C**

Company Name: _____

Name of Parent Company: _____

Headquarters Location: _____

Field Office Locations: _____

Business Specialty or Focus: _____

Number of Full-Time Staff: _____

Founding Date and Brief History: _____

Texas Projects and/or Clients (past & current): _____

Previous Housing Authority Experience: YES NO

List the Authorities: _____

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**Form of Proposal
Attachment D**

- (1) Instructions.** Unless specifically required otherwise, the items listed below must be completed and included in the proposal submittal.
- (2) Debarred Statement.** Has this firm, or any principal(s), ever been debarred from providing any services by the Federal Government, any state government, the State of Texas, or any local government agency within or without the State of Texas? Yes No If "Yes," please attach a full, detailed explanation, including dates, circumstances, and status.
- (3) Disclosure Statement.** Does this firm or any principals thereof have any current, past personal or professional relationship with any Commissioner or Officer of the Agency? Yes No If "Yes," please attach a full, detailed explanation, including dates, circumstances, and current status.
- (4) Felony Disclosure.** Has any principal(s) or any person(s) proposed to perform the work ever been convicted of a felony? Yes No If "Yes," please attach a full, detailed explanation, including dates, circumstances, and status. PLEASE NOTE: The Agency reserves the right not to make an award to any proposer that has staff who have been convicted of a felony if the Agency feels that doing so is in its best interests.
- (5) Non-Collusive Affidavit.** The proposer certifies that such proposal is genuine and not collusive and that said proposer entity has not colluded, conspired, connived or agreed, directly or indirectly, with any proposer or person, to put in a sham proposal or to refrain from bidding, and has not in any manner, directly or indirectly sought by agreement or collusion, or communication or conference, with any person, to fix the proposal price of affiant or of any other proposer, to fix overhead, profit or cost element of said proposal price, or that of any other proposer or to secure any advantage against the Agency or any person interested in the proposed contract; and that all statements in said proposal are true.
- (6) Proposer's Statement.** The proposer hereby states that by completing and submitting this Form and all other documents within this proposal submittal, he/she is verifying that all information provided herein is, to the best of his/her knowledge, true and accurate, and that if the Agency discovers that any information entered herein to be false, such shall entitle the Agency not to consider to make award or to terminate any award. Further, by completing and submitting the proposal submittal, and by entering and submitting the costs where provided, the undersigned proposer thereby agrees to abide by all terms and conditions of this RFP as issued by the Agency, either in hard copy or referenced. Pursuant to all RFP documents, this form of proposal, and all attachments, and pursuant to all completed

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documents submitted, including these forms and all attachments, the undersigned proposers agree to supply the Agency with the services described herein for the fee(s) entered within.

CONTRACTOR:

(Company Name)

By: _____

(Signature)

Printed Name: _____

Title of Authorized Representative: _____

Date: _____

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**Attachment E
Pricing**

Cost Type	Cost	Frequency of Cost (One-Time, Monthly, Yearly)
Implementation		
Licenses		
Migration		
Support & Maintenance		
Training		
Additional Fees/Explain		

Company Name

Printed Name and Title

Signature

Date