

CORPUS CHRISTI HOUSING AUTHORITY & AFFILIATES
RFP 26022 - Cloud-Based Document Management & Workflow Automation
Software Solution- Addendum #2



Date: April 16, 2026

Request for Proposals (RFP) No. 26022 – Cloud-Based Document Management & Workflow Automation Software Solution, is hereby amended as follows:

1. Q – Is Yardi your current software for all property management?
A – The Agency currently utilizes Yardi enterprise products to support property management, housing operations, financial, and compliance-related functions. Yardi is a core enterprise system within the Agency’s operating environment; however, not all business processes or document repositories are managed exclusively within Yardi.

2. Q – If you are changing software, what are you looking to keep Yardi to help manage?
A – The Agency is not changing its core property management or enterprise system as part of this RFP. Yardi will continue to serve as the system of record for core housing, property management, and related operational functions. The intent of this RFP is to implement a document management and workflow solution that integrates with Yardi, rather than replaces it, by associating, linking, or exchanging documents and metadata as appropriate.

3. Q – Is keeping Yardi an absolute? Or if another solution can solve that function as well, would you drop them completely?
A – Retention of Yardi as the Agency’s enterprise property management and housing system is not within the scope of this RFP. Proposals should assume continued use of Yardi and should not propose replacement of Yardi or duplication of its core system functionality. The focus of this RFP is on document management, workflow automation, and related integrations with existing enterprise systems.

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4. Q – Just to confirm on our end, how many employees are at HACC? I'm seeing around 80 and wanted to check if that's correct.

A – The Agency does not publish a specific employee headcount as part of this procurement. Staffing levels may fluctuate and not all employees will be users of the system. Vendors should base their proposals on the functional, technical, integration, and licensing requirements outlined in the RFP and clearly describe any assumptions used for user licensing, roles, or access models within their proposal.

5. Q - **User Counts**

Q- Does the Corpus Christi Housing Authority have an estimated number of users anticipated to access the system at initial implementation and over the contract term, including primary users, approvers, and read-only or occasional users?

A – The Agency has not established users counts for initial implementation or over the contract term. Proposers should recommend scalable, role-based access and licensing mode that accommodates varying user type (e.g., primary users, approvers, read-only or occasional users) based on the Agency's size and operational scope described in the RFP.

6. Q – **User Roles**

Q - Does the Housing Authority anticipate differentiated user roles (e.g., power users, supervisors, records management staff, read-only users), and should proposers assume role-based access and licensing aligned to those functions?

A – Yes. The Agency anticipates differentiated user roles across departments and functions. Proposers should assume role-based access controls and licensing aligned to functional responsibilities (e.g., administrative users, supervisors, records staff, general users, read-only users) and describe how roles can be configured and adjusted over time.

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7. Q – Non-Employee Access

Q - Will system access be required for non-employee users such as contractors, auditors, or temporary staff, and if so, should proposers account for such access in their licensing and security approach?

A. – The Agency anticipates that limited access may be required for non-employee users such as contractors, auditors, or temporary staff. Proposers should describe how their solution supports secure, role based, time bound access for non-employees, including auditability and compliance with security requirements.

8. Q – Content Volume

Q - Can the Housing Authority provide estimated information regarding the volume of content to be managed and/or migrated, such as approximate document counts, total storage size, or both, across existing repositories?

A – The Agency has not completed a consolidated assessment of document counts or total storage volumes across all existing repositories. Proposers should describe their discovery based approach for assessing content volumes and proposing scalable storage and migration strategies.

9. Q – Content Growth

Q - Does the Housing Authority have an expected or estimated annual growth rate for documents or storage that proposers should consider for capacity planning and pricing assumptions?

A – The Agency has not defined an estimated annual growth rate for documents or storage. Proposers should describe how their solution supports scalable capacity growth over the contract term and accommodates increases in usage, content, and storage demand.

10. Q – Document Types

Q - Are there specific document types or business records considered most critical or highest priority for system configuration and migration (e.g., housing files, vouchers, inspections, HR records, Procurement files)?

A – Specific document types and business records have not been predetermined as highest priority. Priority document types and workflows will be identified during discovery. Proposers should describe how their solution supports a broad range of document types across departments such as housing operations, HCV, compliance, finance, procurement, maintenance, and human resources.

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11. Q – Historical Content Migration

Q - Does the Housing Authority intend for all historical content to be migrated into the new system, or should proposers assume a defined cutoff such as active records only or documents within a specified time period?

A – The Agency has not established a fixed approach regarding historical content migration. Proposers should describe options for full, partial, or phased migration (e.g., active records only or defined timeframes) and provide recommendations during discovery based on risk, value, and effort.

12. Q – Data Quality and Remediation

Q - Should proposers assume legacy content will be migrated in its current state, or is data cleanup, metadata enrichment, or remediation expected as part of the migration scope?

A – The Agency has not finalized the scope of data cleanup or remediation activities. Proposers should describe their approach to migrating legacy content in its current state and available options for metadata enrichment, normalization, and remediation for Agency consideration during discovery.

13. Q – Yardi Integration Scope

Q - With respect to Yardi integration, can the Housing Authority clarify whether the primary expectation is for the new DMS to ingest or associate documents originating from Yardi, to push or expose documents and metadata to Yardi, or a combination of both?

A – The primary expectation is for the solution to support document association, linkage, or metadata exchange with Yardi-related records and workflows. Proposers should describe supported integration patterns, including ingesting documents originating from Yardi, exposing documents and metadata to Yardi, or a combination thereof.

14. Q – Additionally, please confirm that configuration changes, workflow modifications, or development activities within the Yardi platform itself are not included within the scope of this RFP unless explicitly stated.

A – Configuration changes, workflow modifications, or development activities within the Yardi platform itself are not included in scope unless explicitly stated in the RFP. Proposers should plan to provide end-to-end support for the DMS side of any integration while coordinating with Yardi support and Agency resources as appropriate.

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15. Q – AI Capability Emphasis

Q - Of the AI-related capabilities referenced in the solicitation (such as classification, metadata extraction, semantic search, and intelligent discovery), are there specific capabilities the Housing Authority considers most critical for evaluation purposes?

A – The RFP references multiple AI enabled capabilities, including classification, metadata extraction, semantic search, and intelligent discovery. The Agency has not ranked individual AI features; however, solutions will be evaluated based on how effectively AI capabilities support document retrieval, efficiency, accuracy, and scalability. Proposers should clearly describe which AI capabilities are available at go live and which may be phased in.

16. Q – AI Governance Considerations

Q - Are there any internal policies, governance requirements, or regulatory considerations related to the use of AI or automated data processing that proposers should consider when describing AI functionality?

A – Proposers should ensure that AI and automated data processing capabilities comply with applicable security, privacy, and regulatory requirements and align with Agency governance expectations. Proposers should describe safeguards, transparency measures, and controls related to AI functionality.

17. Q – Records Retention Authority

Q - For purposes of system configuration, please confirm which authoritative records retention schedules will govern this implementation (e.g., CCHA specific schedules, City of Corpus Christi schedules, Texas State Library and Archives Commission requirements, HUD requirements, or a combination thereof).

A – Records retention requirements may derive from a combination of Agency-specific policies, applicable state requirements, and federal program requirements. Proposers should describe how their solution supports configurable retention schedules and accommodates multiple regulatory frameworks.

18. Q – Housing Authority Participation

Q - Does the Housing Authority anticipate assigning internal subject-matter experts, records staff, and IT personnel to participate in discovery, design, testing, and ongoing governance activities during system implementation?

A – Yes. The Agency anticipates participating in discovery, design, testing, and governance activities through appropriate internal subject-matter experts, records staff, and IT personnel. Proposers should describe how they collaborate with Agency resources throughout implementation.

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19. Q – **Training Delivery Format**

Q - The RFP references the use of live instructor-led, virtual, on-demand, and hands on training formats. Please confirm whether onsite, in person training is a mandatory requirement, or whether fully virtual and self-guided training approaches are acceptable provided all functional training objectives are met.

A – The RFP allows for a mix of instructor-led, virtual, on-demand, and hands-on training formats. Onsite, in-person training is not mandated provided that all functional training objectives are met. Proposers should describe their recommended training approach.

20. Q – Please provide the total number of users.

A – The Agency has not established a fixed user count. Proposers should recommend a scalable, role-based access and licensing model (e.g., full users, limited users, view-only users) based on the Agency size and operational scope described in the RFP.

For the migration of existing documents to the new solution:

21. Q – How large is the database in GB, broken down by data volume (case management data, etc.) and document/file volume?

A – The Agency has not completed a consolidated inventory or sizing assessment of databases across all repositories. Proposers should describe discovery-based methodologies for assessing database size and data composition during implementation.

22. Q – Total number of documents to be converted?

A – A consolidated document count has not been established. Proposers should describe scalable migration approaches that accommodate variable document volumes.

23. Q – Total number of files to be converted?

A – The Agency has not finalized file counts across all repositories. File quantities will be identified during discovery.

24. Q – What are the file types stored, examples (.tif, .pdf, .docx)?

A – The Agency utilizes a mix of standard file types including PDF, TIFF, Microsoft Office formats, image files, and email-based content. Proposers should describe support for heterogeneous file types

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25. Q – Does the current system store any documents with a proprietary file format?
A – The Agency has not completed an inventory confirming the presence or absence of proprietary formats across all systems. Proposers should describe experience handling proprietary or legacy formats during migration.
26. Q – How large is the current file store (GB) for all the document files stored in the repository?
A – The Agency has not finalized consolidated storage size metrics. Storage analysis will be conducted during discovery.
27. Q – Are file paths stored in clear text in the database or does the database obfuscate or encrypt the file paths?
A – File path storage methods vary by system and have not been fully documented. These details will be validated during discovery.
28. Q – Are notes or annotations to be converted?
A – The Agency has not defined a mandatory requirement for conversion of notes or annotations. Proposers should describe supported options and recommendations based on value and effort.
29. Q – Do document renditions or versions need to be converted?
A – Conversion of renditions or historical versions is not currently mandated. Proposers should describe options and considerations for Agency review during discovery.
30. Q – Can the document files be opened directly from the file share using standard viewers, examples (MS Word, Adobe PDF Viewer, MS Paint, MS Excel)?
A – Documents across existing repositories are generally accessible using standard applications: however, behavior may vary. Proposers should describe validation approaches to confirm accessibility during migration planning.
31. Q – Are the document files compressed or zipped?
A – The Agency has not identified all instances of file compression. Proposers should describe their ability to identify and handle compressed files during migration.

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32. Q – Are the document files encrypted?

A – Encryption practices vary by repository and are not fully documented. Proposers should describe approaches for identifying and managing encrypted content.

33. Q – Product Name and version?

A – The Agency utilizes multiple repositories, including FileVision, SharePoint, network file shares and email systems. Detailed versions will be validated during discovery.

34. Q – Product vendor?

A – Current repositories include FileVision, Microsoft SharePoint, and other enterprise file systems.

35. Q – Database platform?

A – Database platforms supporting existing repositories will be validated during discovery. Proposers should plan to support migration from mixed environments.

36. Q – Do any COLD (Computer Output to Laser Disk) documents need to be converted?

A – The Agency is not aware of any COLD documents currently maintained within its repositories. If such content is identified during discovery, migration requirements will be evaluated at that time.

37. Q – Describe the desired output for migration of Email PST. Do you desire each email to be stored as a separate document? How many PST files will be migrated, and what are the sizes of these?

A – The Agency has not finalized the migration approach, counts, or sizes for Email PST files. Proposers should describe supported options for email migration, including individual message conversion, metadata preservation, and attachment handling, for Agency evaluation during discovery.

38. Q – Do the existing network shares utilize a consistent Naming convention for files that would allow an automated import to the new system based on existing file name values

A – Naming conventions are inconsistent across network shares and departments. Proposers should not assume standardized naming structures and should describe methods for metadata mapping, normalization, and exception handling during migration

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39. Q – Do the SharePoint files utilize a consistent naming convention for files that would allow an automated import to the new system based on existing file name values?
A – File naming conventions within SharePoint libraries are not consistently standardized. Proposers should describe approaches for importing and normalizing content where naming conventions vary.
40. Q – Do you have clearly documented retention schedules created, and are they applied to your existing files? If no, do you expect that retention rules will need to be applied to migrated content?
A – The Agency maintains retention requirements; however, retention rules are not consistently or uniformly applied across all existing repositories. Proposers should expect that retention schedules may need to be reviewed, refined, and applied to migrated content as part of implementation.
41. Q – What pain points with the existing systems do you hope to primarily address in the new system?
A – Key objectives include improving document accessibility, standardizing metadata, reducing manual handling, enhancing workflow automation, strengthening compliance and audit readiness, improving integration with existing enterprise systems, and consolidating disparate repositories.
42. Q – Given the number of departments expecting to use the system, a phased go live approach would be recommended. Do you have a preferred order for departmental adoption? (e.g., Finance, HR, Procurement, Maint., Compliance, HCV, Prop Mgmt.)
A – The Agency anticipates a phased deployment; however, a definitive departmental adoption sequence has not been established. Proposers should describe recommended approaches for phased onboarding across departments such as Finance, Human Resources, Procurement, Maintenance, Compliance, HCV, and Property Management.

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Yardi Integration (Section 2.3.6)

43. Q – Which Yardi product and version does CCHA currently use (e.g., Yardi Voyager 7S, RENTCafé, Yardi Breeze)? Does CCHA have access to the Yardi API (RESTful Services) or does integration currently rely on flat file exports, SQL views, or ODBC connections?
- A – CCHA utilizes Yardi (Voyager and Elevate) enterprise products to support housing, finance, and property management operations. Specific product versions and available integration methods (e.g., APIs, flat files) will be validated during discovery. Proposers should describe supported integration approaches with Yardi environments rather than assume a specific integration method.
44. Q – What level of integration depth is expected at initial go-live versus future phases? For example, is the initial expectation limited to document linking and metadata look up (e.g., resident ID, property, work order number), or does CCHA also expect bi-directional writeback of case notes, activity logs, or document status into Yardi records from day one?
- A – Initial integration expectations include document association and metadata lookup (e.g., resident ID, property, or transaction reference) to enable secure access from Yardi-related workflows. Additional integration depth may be phased in over time. Proposers should describe scalable integration approaches that support phased expansion without requiring final integration scope to be predefined at go-live.
45. Q – Are there specific Yardi modules or transaction types (e.g., Housing Choice Voucher recertifications, work orders, accounts payable, move-in/move-out packets) that are highest priority for document integration?
- A – Priority use cases will be identified during discovery. Proposers should describe how their solution supports document integration across a range of Yardi-related workflows, including housing operations, maintenance, finance, and compliance, without presuming a single use case.
46. Q – Does CCHA have internal Yardi technical or development staff (internal or external) who would participate in the integration effort (e.g., API configuration, data mapping, testing), or should vendors plan to provide full-service integration support?
- A – Proposers should plan to provide end-to-end integration support, including configuration, data mapping, testing, and deployment, while coordinating with Yardi support and Agency IT resources as appropriate.

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User Environment (General)

47. Q – Approximately how many total users will require access to the document management system, and does CCHA anticipate different access levels (e.g., full users, read-only, occasional/light users)? Understanding the user profile will help us provide the most accurate licensing and 5-year TCO model.
- A – User counts and access levels have not been predetermined. Proposers should recommend scalable, role-based access and licensing models (e.g., full users, view-only users) based on Agency size and operational scope described in the RFP.
48. Q – How many departments does CCHA expect to onboard in the initial implementation versus subsequent phases?
- A – Initial and phased departmental onboarding will be determined during implementation planning. Proposers should describe approaches that support phased deployment across multiple departments.

AI & Intelligent Search (Section 2.2, 2.3.1)

49. Q – Section 2.2 references "AI-powered search capabilities that intelligently analyze document content and images, enabling semantic and contextual search and visual recognition." Can CCHA clarify whether the expectation is for production-ready AI semantic search engine at go-live, or whether AI-assisted capabilities such as automated document classification, intelligent metadata extraction, and OCR-enhanced full-text search would satisfy the core requirement, with more advanced semantic and visual recognition capabilities delivered through a phased roadmap?
- A – The RFP requires AI-powered search capabilities that analyze document content and images to support intelligent retrieval. Proposers should clearly describe which AI capabilities are available at go-live and which may be delivered through a roadmap. Solutions will be evaluated based on current functionality, roadmap credibility, and alignment with Agency needs.

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Legacy Migration (Section 2.2, 2.6)

50. Q – Can CCHA provide an approximate volume of records to be migrated from FileVision (total document count or storage size), and are there additional legacy repositories beyond FileVision, network shares, SharePoint libraries, and email PSTs identified for migration?

A – CCHA has not provided consolidated document counts or storage volumes. Identified repositories include FileVision, network shares, SharePoint libraries, and email stores. Proposers should describe discovery-based approaches for identifying additional sources and planning migration.

51. Q – Is CCHA's FileVision environment on-premises or hosted, and does CCHA have the ability to export documents and metadata in standard formats (e.g., PDF/TIFF with CSV/XML index files)?

A – Specific FileVision deployment and export details will be validated during discovery. Proposers should describe their ability to migrate content and metadata from FileVision using standard export formats where available.

Microsoft 365 Integration (Section 2.3.6)

52. Q – For the Microsoft 365 integration requirement — specifically SharePoint libraries, Teams tabs, and Outlook add-in — does CCHA envision the DMS as the primary document repository with M365 serving as an access and collaboration layer, or does CCHA expect documents to reside in both SharePoint and the DMS with synchronization between them?

A – The DMS is intended to serve as the system of record, with Microsoft 365 integrations supporting secure access, collaboration, and operational efficiency. Proposers should describe integration approaches that avoid uncontrolled duplication while enabling effective collaboration within SharePoint, Teams, and OneDrive.

Submission Logistics

53. Q – The RFP specifies delivery of one original and one copy in a sealed envelope. Does CCHA also accept or require an electronic copy (USB drive or email) in addition to the physical submission?

A – Proposals must be submitted in accordance with the submission requirements stated in the RFP. Proposers should follow the instructions as published unless modified by addendum.

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54. Q – Can the total number of documents and/or the total file size to be migrated from ALL repositories (network shares, FileVision, SharePoint libraries, email PSTs) be shared?

A – The Agency has not provided consolidated document counts or storage volumes across all repositories. Proposers should describe their approach for discovery-based assessment, migration planning, and scalable handling of legacy content as outlined in the RFP.

55. Q – For future growth, how much additional storage do you anticipate needing annually?

A – Specific annual storage growth estimates have not been defined. Proposers should describe scalable storage architectures and pricing models that support growth over the contract term.

56. Q – What is the total number of unique document types?

A – The Agency has not defined a fixed number of document types. Proposers should describe flexible document classification and metadata models capable of supporting evolving operational needs across departments.

57. Q – How many unique forms are currently in use?

A – A consolidated inventory of all forms has not been finalized. Proposers should describe how their solution supports flexible forms management, data capture, and integration as outlined in the RFP.

58. Q – How many workflow routing rules do you have? Which ones make updates to your business\SIS apps?

A – The Agency has not defined a fixed number of workflow rules. Workflow priorities and integrations will be identified during discovery. Proposers should describe how their solution supports configurable workflows and integrations without presuming a predefined routing model.

59. Q – If the solution requires a VM to be locally hosted, is that an automatic disqualification?

A – Yes. As stated in Section 2.2 of the RFP, the Agency is seeking a **cloud-based SaaS solution only**. On-premises or locally hosted infrastructure is not within scope.

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60. Q – Must all Content be converted to PDF/A format? Is PDF/A a mandatory requirement?
A – PDF/A support is required where applicable for records management and compliance purposes. Proposers should describe how their solution supports PDF/A alongside other native and image-based formats, in accordance with record retention and regulatory needs.
61. Q – In what circumstances would a document require a watermark?
A – Watermarking may be required for controlled, sensitive, or externally distributed documents. Proposers should describe configurable watermarking capabilities and use-case support.
62. Q – Are there any requirements that, if answered in the negative, would be means for an automatic disqualification?
A – All mandatory requirements are identified within the RFP, including cloud-based SaaS deployment and security/compliance requirements. Proposals will be evaluated for responsiveness in accordance with Section 4 of the RFP.
63. Q – Could CCHA describe (or provide use cases for) the type(s) of integration with SharePoint, Teams, and OneDrive that will be needed?
A – Microsoft 365 integrations are intended to support secure access, collaboration, and operational efficiency while maintaining system-of-record controls within the document management platform. Proposers should describe integration approaches that support filing, access, and identity management without duplicating records across systems.
64. Q – Does the agency currently utilize PowerBI, Tableau or something similar for reporting?
A – The Agency utilizes reporting and analytics tools across the organization. Proposers should describe how their solution supports data export and integration with reporting platforms as outlined in the RFP.
65. Q – We require an NDA in place before divulging some information required in this bid. Would it be possible to have our mutual NDA signed by CCHA ahead of the submission deadline? If so, could you please let us know how we can accomplish this?
A – The Agency does not execute NDAs during the solicitation phase. Proposers should submit responses based on the information provided in the RFP and published addenda.

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66. Q – Is CCHA open to an alternative to DocuSign for eSignature?
A – Yes. DocuSign is referenced as an example. Proposers may propose alternative eSignature solutions that meet security, compliance, and audit trail requirements.
67. Q – If there are requirements that are currently not part of the product, but is on the roadmap for the product, is that acceptable?
A – Proposers should clearly identify which requirements are currently available and which are planned. The Agency will evaluate solutions based on current capabilities, roadmap credibility, and alignment with Agency needs.
68. Q – When does CCHA expect to make an award and/or complete contracting with the selected vendor?
A – Award and contracting timelines will follow the evaluation and negotiation process described in the RFP. Specific dates have not been guaranteed.
69. Q – When does CCHA anticipate to begin project implementation?
A – Implementation timing will be coordinated following contract execution and finalization of the project plan.
70. Q – When does the current contract(s) for the current solution(s) expire (if any)?
A – Details of existing contract terms are not disclosed as part of this solicitation.
71. Q – What is CCHA’s annual spend for the current solution(s) (if any)?
A – The Agency does not disclose current spend information during the solicitation process.
72. Q – How many individuals (total) will need to scan documents into the document repository?
A – A total number has not been defined. Proposers should describe how their solution supports distributed and role-based document capture.

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73. Q – How many individuals (total) will need to log in and view documents stored in the repository?
A – User counts and access levels have not been predetermined. Proposers should recommend scalable, role-based access models based on Agency size and operational scope described in the RFP.
74. Q – How many individuals will need to be logged in and view documents stored in the repository at the same time?
A – Concurrent usage requirements have not been defined. Proposers should describe their solution’s ability to support concurrent access at enterprise scale.
75. Q – Has a budget been allocated and approved for this project?
A – Budget details are not disclosed. Proposers should submit pricing in accordance with the RFP and demonstrate value and cost transparency.
76. Q – What is CCHA’s budget for the project?
A – Budget details are not disclosed. Proposers should submit pricing in accordance with the RFP and demonstrate value and cost transparency
77. Q – Has CCHA seen demos of any potential solutions or related technologies in the last 12 months? If so, which ones?
A – The Agency does not disclose vendor demonstrations, evaluations, or prior engagements during the solicitation process.
78. Q – Has CCHA worked or consulted with any vendors and/or external sources in the development of the requirements for this RFP? If so, please identify
A – CCHA conducted independent research using publicly available industry information. No vendor assisted in drafting the RFP or received preferential treatment.
79. Q – What departments will be utilizing the new solution?
A – The solution will support Agency operations across departments such as Finance, Human Resources, Procurement, Compliance, Maintenance, HCV, and Property Management.

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80. Q – To confirm, CCHA is looking for a 5-year contract term?

A – Yes. As stated in Section 5.3 of the RFP, the contract includes one initial year with four one-year renewal options.

81. Q – May offerors provide their template contracts/Agreement, or will there be an opportunity to negotiate the contract upon award?

A - Per Section 5.2.1 of the RFP, the Agency will execute contracts using the Agency's standard contract form. Contract terms may be negotiated with the selected proposer during contract negotiations following award, consistent with the RFP and applicable procurement requirements.

82. Q – How many total users will need access? Of these users will they all need full access or are any of them just -View/search only users?

A – Agency size and operational scope are described in Section 2.1 (Background). Proposers should use this information to recommend an appropriate licensing and access model.

83. Q – What are the top workflows you want to fix first?

A – Initial workflow priorities will be determined collaboratively during the discovery and design phase. Proposers should describe their approach for identifying, prioritizing, and designing high-impact workflows across departments such as Finance, Human Resources, Procurement, Maintenance, HCV, and Property Management.

84. Q – How does Yardi need to integrate with this solution?

A – As described in Section 2.3.6, the solution must support integration with Yardi to surface or link documents to relevant records and support metadata exchange using available APIs, flat files, or other supported methods. Proposers should describe their supported integration patterns and experience integrating with Yardi environments.

85. Q – Where does document intake break down today?

A – Current document intake challenges vary by department and process. Proposers should describe how their solution improves document capture, routing, validation, and tracking across multiple intake channels as outlined in Section 2.3.2.

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86. Q – Where are documents stored today? -- FileVision, Shared drives?, SharePoint?, Email (PSTs)?
A – As noted in Section 2.2 and Section 2.3.6, the Agency currently utilizes FileVision and additional repositories such as network shares, SharePoint libraries, and email stores. Proposers should describe their approach to assessing, migrating, and consolidating document repositories as part of the implementation.
87. Q – What’s the total volume of documents or TBs?
A – The Agency has not provided a specific document volume or storage estimate. Proposers should outline their methodology for assessing document volume during discovery and propose scalable storage and pricing models.
88. Q – What does success look like after implementation?
A – Success is defined by improved accessibility, efficiency, compliance, and audit readiness; reduced manual handling and processing time; effective workflow automation; reliable integrations with existing systems; and successful user adoption. Proposers should describe how their solution measures and supports these outcomes.
89. Q – Does the integration with Yardi require a bi-directional data transfer? Does I also need to include documents/images alongside the metadata?
A – As stated in Section 2.3.6, the solution should support pushing and pulling metadata and associating documents with Yardi records where feasible. Proposers should describe their supported integration capabilities, including bi-directional data exchange and document linkage options.
90. Q – What is the plan for handling the current data migration to the new system and do you have any specific tools or process in mind?
A – The Agency expects the selected vendor to propose a structured migration approach as part of their implementation methodology. Proposers should describe tools, processes, validation methods, and risk mitigation strategies for migrating legacy content as outlined in Sections 2.3.1 and 2.5.

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91. Q – Of the Microsoft 365 integrations listed, what are the individual levels of integration expected for each.
- A – As described in Section 2.3.6, the solution must integrate with Microsoft 365 components such as SharePoint, Teams, Outlook, OneDrive, and Azure AD. Proposers should describe available integration levels and how they support secure access, filing, collaboration, and identity management.
92. Q – Of the Microsoft 365 integrations listed, can you describe the general intent for the integrations? For instance, are they intended to be used as repositories or secondary locations for sharing information between domains or systems?
- A – Microsoft 365 integrations are intended to support secure access, collaboration, and operational efficiency while maintaining system-of-record controls within the proposed document management solution. Proposers should describe how their solution supports this intent and recommended architectural patterns.
93. Q – Is a solution which is designed to store and manage documents in its own repositories acceptable?
- A – Yes. As stated in Section 2.2, the Agency is seeking a secure, cloud-based document management solution capable of serving as the system of record, with integrations to existing systems as required.
94. Q – Once inbound mail or documents are received, what steps does the CCHA team take to begin processing inbound documents today? Are there any challenges you're looking to solve for through this RFP?
- A – Inbound document processing varies by department and intake channel. Documents may be received via physical mail, email, direct uploads, web-based submissions, and other electronic methods. While physical mail is received, the Agency operates in a predominantly digital environment and expects any required paper documents to be converted to digital format as part of intake.
- This RFP is intended to address challenges related to manual handling, delayed visibility, inconsistent indexing, limited automation, and the need for advanced AI-powered search and knowledge discovery across both native digital files and scanned image-based documents, including OCR- and vision-enabled search capabilities.

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95. Q – How many P.O. boxes does CCHA manage today for inbound mail?

A – The Agency has not designated a specific number of P.O. boxes for purposes of this RFP. Physical mail is not the primary intake channel, and any documents received via mail that require retention or processing are expected to be digitized as part of intake. Proposers should describe how their solution supports both physical and electronic intake models.

96. Q – Can you provide estimated monthly volumes for inbound documents broken out by physical mail envelopes, emails, faxes, PDF uploads, and web forms?

A – The Agency has not provided estimated monthly document volumes or channel-specific breakdowns. Intake occurs through multiple channels, with a strong emphasis on electronic and digital submissions. Proposers should describe how their solution accommodates variable intake volumes across physical and electronic channels and supports digitization and automation as part of processing.

97. Q – On average, how many documents are included in each envelope?

A – Document groupings vary based on business process and intake method. There is no standard average per envelope or submission. Proposers should describe how their solution handles single documents and multi-document packets across both physical and electronic intake channels.

98. Q – For direct uploads and email submissions, will documents be provided in PDF format?

A – Documents may be received in a variety of file formats, including but not limited to PDF, common office document formats, and image-based formats (e.g., TIFF, JPEG, PNG). The proposed solution must support ingestion, normalization, OCR, and AI-powered search and analysis across both native digital files and scanned or image-based documents, consistent with the requirements of the RFP.

99. Q – How many scanned images does CCHA produce each month?

A – The Agency has not provided a specific monthly scan count. Proposers should describe scalable ingestion and pricing models that accommodate variable scanning volumes.

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100. Q – Which document types are included in scope for this RFP?

A – The RFP scope includes documents supporting Agency operations across departments such as Finance, Human Resources, Procurement, Compliance, Maintenance, HCV, and Property Management. Proposers should describe flexible document classification and metadata models.

101. Q – What is the average number of images per document type? (For reference, one image equals one side of an 8.5" x 11" sheet of paper.)

A – Image counts vary by document type and process. Proposers should describe how their solution handles variable document length without reliance on fixed assumptions.

102. Q – Does CCHA currently receive inbound checks? If so, approximately how many are received per month?

A – The RFP does not include requirements for check processing. References to the Finance department within the RFP relate to document management, records retention, workflow automation, and audit support. Specific volumes of inbound checks are not applicable to the scope of this solicitation.

103. Q – What steps does the CCHA team follow today to process inbound checks?

A – This RFP does not address check processing or financial transaction workflows. Proposers should focus on document management, workflow automation, records retention, audit support, and search capabilities as defined in the RFP, rather than payment or check processing activities.

104. Q – Of the total volume of documents received and processed, how many documents require indexing?

A – Indexing requirements vary by document type and business process. The Agency is seeking solutions that minimize manual indexing through automation, metadata extraction, and AI-driven classification, with indexing serving as a supporting capability rather than the primary method of document retrieval. Proposers should describe how their solution reduces reliance on manual indexing while enabling intelligent search and discovery.

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105. Q – What is the average number of index fields required per document?
A – Metadata and index field requirements vary by record type and workflow. The Agency expects flexible, configurable metadata models that support records management and automation, while prioritizing advanced AI-powered search, semantic understanding, and content-based discovery over reliance on fixed index fields. Proposers should describe how their solution balances metadata with intelligent search capabilities.
106. Q – Once fields are indexed and extracted, what does CCHA need to do with the data next (i.e. integrate with 3rd party tool, downstream application, etc.)?
A – Indexed and extracted data is used to support workflows, records management, reporting, and intelligent retrieval. The Agency’s priority is enabling advanced AI-powered search, contextual discovery, and knowledge access across documents, rather than relying on rigid downstream data pipelines. Where required, data and document metadata should support integration with systems such as Yardi and Microsoft 365 through standards-based, configurable integration methods. Proposers should describe flexible integration approaches that complement AI-driven discovery and workflow automation.
107. Q – How many unique process flows does CCHA have in place today?
A – The Agency has not defined a fixed number of workflows. Proposers should describe how their solution supports discovery, prioritization, and scalable workflow development.
108. Q – How many users will require access to the platform?
A – User counts and access levels have not been predetermined. Proposers should recommend scalable, role-based access and licensing models based on the Agency size and departmental usage described in the RFP.
109. Q – Once a job enters the workflow queue, what steps does the CCHA team take to process and complete it?
A – Workflow steps vary by process and department. Proposers should describe configurable workflow management, task queues, SLAs, escalations, and auditability.

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110. Q – For forms management, is CCHA looking for the vendor to replace the current solution, or to capture data from web forms?

A – Proposers should describe how their solution supports forms management, data capture, and integration. Replacement or coexistence approaches may be proposed, subject to Agency review.

111. Q – Is archival and retention of digitized document images required? If so, what is the required retention period?

A – Yes. The solution must support records retention, legal holds, and disposition in accordance with applicable public-sector requirements. Retention periods vary by record type.

112. Q – Does CCHA require the vendor to take over the storage of legacy repositories?

A – Proposers should describe their approach to migration and long-term storage of legacy repositories as outlined in the RFP.

113. Q – If so, how many digital documents are housed in the current repository? What is the size in GB or TB?

A – The Agency has not provided a consolidated volume or storage estimate. Proposers should describe discovery-based assessment and scalable storage approaches.

114. Q – What is the required SLA by document type?

A – Specific SLAs have not been prescribed. Proposers should describe standard and configurable SLA options aligned with public-sector workflows.

115. Q – Per section 5.1.1 of the RFP - Is CCHA willing to negotiate the terms of the CCHA Agreement should a respondent be awarded the business?

A – Per Section 5.2 of the RFP, contract terms will be based on the Agency's standard agreement, with negotiation occurring during post-award contract negotiations as applicable.

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116. Q – Some of the requirements in the RFP read exactly like vendor’s marketing materials.
A – The RFP was developed internally by CCHA based on operational needs and publicly available industry information. No vendor reviewed, influenced, or had access to the final solicitation prior to its public release.
117. Q – Did any vendor or consultant assist in writing the RFP?
A – CCHA conducted independent research and reviewed publicly available information to inform its requirements. No vendor assisted in drafting the RFP or received preferential treatment.
118. Q – Can we get a list of the vendors who submitted questions?
A – In order to maintain a fair and competitive procurement process, CCHA does not disclose the identities of vendors who submit questions. All substantive questions and responses will be shared with all prospective proposers.
119. Q – Do you have a user count or type of user licensing that is required?
A – The Agency has not established a fixed user count or prescribed licensing model. Proposers should recommend a scalable, role-based access and licensing approach that supports varying user types based on the Agency’s size and operational scope as described in the RFP.
120. Q – Estimated number of users.
A -The Agency has not established a fixed user count. Proposers should recommend a scalable, role-based access and licensing model (e.g., full users, limited users, view-only users) based on the Agency size and operational scope described in the RFP.
121. Q – A copy of the current or proposed contract, including terms and conditions.
A – Sample Contract Attached
122. Q- Do you have an expected timeline as to when responses will be provided?
A – Responses to vendor questions will be issued in accordance with the RFP schedule via formal addendum. Vendors should monitor published addenda for official updates.

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All other terms and conditions of the Solicitation remain unchanged. **The signed addendum must be returned with your RFP submission.**

Acknowledged and accepted:

Company: _____

Representative Name: _____

Signature: _____

Date: _____

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INTRODUCTION

This contract by and between the Corpus Christi Housing Authority & Coastal Housing Partners (hereinafter "the Agency"), and _____ (hereinafter "the Contractor") is hereby entered into this ____ day of _____ 2025.

Services pursuant to this contract shall begin on the _____ day _____, 2025 and shall end on the _____ day of _____ 2025, unless otherwise extended, modified, terminated, or renewed by the parties as provided for within this contract.

1.0 Definitions.

- 1.1 **Contracting Officer (CO).** The Agency Contracting Officer is the Chief Executive Officer (CEO) or designee.
- 1.2 **Coastal Housing Partners.** Any reference herein or within any Appendix to the "Coastal Housing Partners" or the "HA" shall be interpreted to mean, Bluebonnet Gardens, Corpus Christi Financial Corporation, Thanksgiving Homes, Bahia, Corban LLC, Hampton Port LLC and Sea Breeze or any combination thereof, the same as the Agency.

2.0 Services and Payment.

- 2.1 **Scope of Services.** The services provided pursuant to this contract generally consist of those services for the Agency as described herein, and within the RFP ____ and within the Appendices. Said services shall be provided on the dates and times determined by the Agency.
- 2.2 **Provisions of any and all Work.** The Contractor shall not begin any additional work (other than that already detailed herein) without the receipt of a completed request from the authorized Agency representative.
- 2.3 **Cost/Value of Services.**
 - 2.3.1 **Contract Value.** The current total Not-To-Exceed (NTE) value of this contract is: \$____, ____.
 - 2.3.2 The Contractor exceeds the NTE amount at his/her own risk. The Contractor is under no obligation to provide additional services that would cause the Contractor's fees to exceed the NTE amount without prior revision of this amount by written change order. Further, the Agency reserves the right to amend this amount (increase/decrease) at any time during the ensuing contract period(s) when the Agency determines to do so in its best interest.
- 2.4 **Renewal Options.** The contract is initially executed for the period of 1 year with the option, at the Agency's discretion, of four additional one-year option period, for a maximum total of 5 years.

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2.5 Billing Method.

2.5.1 To receive payment for services rendered pursuant to this contract the Contractor shall submit a fully completed invoice for work previously performed to:

Corpus Christi Housing Authority & Coastal Housing Partners
Attention: Accounts Payable
3701 Ayers Street, Corpus Christi, TX 78415
Email: cchainvoices@yardifs.com
(361) 889-3323

2.5.2 The Agency will pay each such properly completed invoice received on a Net/30 basis. Any invoice received not properly completed will not be paid unless and/or until the Contractor complies with the applicable provisions of this contract.

3.0 **Contractor's Obligations.** Pursuant to this contract, the Contractor agrees to provide the specific services detailed herein and also shall be responsible for the following:

3.1 **Supervision and Oversight.** The Contractor shall be solely responsible for providing supervision and oversight to all of the Contractor's personnel that are assigned to the Agency properties pursuant to this contract.

3.2 **Qualified Personnel.** The Contractor warrants and represents that it will assign only qualified personnel to perform the services outlined herein and within the appendices. For the purposes of this contract, the term "qualified personnel" shall mean those personnel that have been investigated, tested and trained in the manner described within this contract and, as proposed by the Contractor within its bid or as provided by the Contractor during the Contractor's normal conduct of business.

3.3 **Compliance with Federal and State Laws.** All work performed by the Contractor, pursuant to this contract, shall be done in accordance with applicable all Federal, State, and local laws, regulations, codes, and ordinances.

3.4 Insurance Requirements.

3.4.1 **Indemnity.** The complete indemnity requirements are detailed within Section 10.19 herein.

3.4.2 **Insurances.** In this regard, the Contractor shall maintain the follow insurance coverage during the effective term(s) of this contract:

3.4.2.1 **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

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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 maximum deductible amount of \$5,000;

- 3.4.2.2 Automobile Liability Insurance.** Automobile Liability coverage in a combined single limit of \$1,000,000. For every vehicle utilized during the term of this contract, 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, with a deductible not greater than \$5,000.
- 3.4.2.3 Worker's Compensation Insurance.** Worker's compensation coverage evidencing carrier and coverage amount.
- 3.4.2.4 Certificates/Endorsements.** The Contractor shall provide to the Agency with current certificate(s)/endorsement(s) evidencing the insurance coverage referenced above. Failure to maintain the above-reference insurance coverage, including naming the Agency as an additional insured (where appropriate) during the term(s) of this contract shall constitute a material breach thereof. Insurance certificate(s)/endorsement(s) shall be delivered to the following department at the Agency:

Corpus Christi Housing Authority & Coastal Housing Partners
Attention: Procurement
3701 Ayers Street, Corpus Christi, TX 78415
Email: procurement@hacc.org

- 3.5 Licensing.** The Contractor shall also provide to the Agency a copy of any required licenses. Failure to maintain these licenses in a current status during the term(s) of this contract shall constitute a material breach thereof.
- 3.6 Financial Viability and Regulatory Compliance.**
- 3.6.1** The Contractor warrants and represents that its corporate entity is in good standing with all applicable federal, state, and local licensing authorities and that it possesses all requisite licenses to perform the services required by this contract. The Contractor further warrants and represents that it owes no outstanding delinquent federal, state, or local taxes or business assessments.
- 3.6.2** The Contractor agrees to promptly disclose to the Agency any IRS liens or insurance or licensure suspension or revocation that may adversely affect its capacity to perform the services outlined within this contract. The failure by the Contractor to disclose such issue to the Agency in writing within 5 days of such notification received will constitute a material breach of this contract.

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3.6.3 The Contractor further agrees to promptly disclose to the Agency any change of more than 50% of its ownership and/or any declaration of bankruptcy that the Contractor may undergo during the term(s) of this contract. The failure of the Contractor to disclose any change of more than 50% of its ownership and/or its declaration of bankruptcy within 5 days of said actions shall constitute a material breach of this contract.

3.6.4 All disclosures made pursuant to this section of the contract shall be made in writing and submitted to Agency within the time periods required herein.

3.7 Confidentiality. The Contractor, in connection with performing his/her services hereunder, will have access to or may be provided certain confidential information concerning the Agency and agrees that any information concerning the finances, accounting practices, business, client, client lists, property information, client data, records of the Agency or any other information which a reasonable person could conclude that should remain confidential (collectively Confidential Information), will not be disclosed to any party and without limitation, any employee of the Agency or any client or potential client of the Agency at any time, except for the Contractor's legal counsel, accounts, or financial advisors, who will also hold such Confidential Information in confidence. The Contractor acknowledges that the information is being provided with the sole understanding that all Confidential Information will remain confidential and will be held in the strictest confidence. The Contractor further acknowledges that any disclosure of the Confidential Information, whether intentional or inadvertent, may harm the Agency. The Agency will have the right to enforce this Contract by specific performance, as well as hold the Contractor liable for any damage caused by any disclosure of any Confidential Information, whether intentional or inadvertent. The Contractor agrees that he has received valuable consideration for the entering into of this Contract and agrees to be bound all of its terms and conditions. This Contract will be binding on the Contractor and any attorney, accountant, financial advisor who also may be provided Confidential Information.

4.0 Modification. This contract shall not be modified, revised, amended, or extended except by written addendum, preferably executed by both parties, but the Agency shall retain the right to issue a unilateral addendum, the Contractor shall not have the same right.

5.0 Severability. The invalidity of any provision of this contract, as determined by a court of competent jurisdiction, shall in no way affect the validity of any other provision herein.

6.0 Applicable Laws.

6.1 Compliance with Federal and State Laws. All work performed by the Contractor, pursuant to this contract, shall be done in accordance with applicable all Federal, State, and local laws, regulations, codes, and ordinances.

6.2 Jurisdiction of Law. The laws of the State of Texas shall govern the validity, construction, and effect of this contract, unless said laws are superseded by, or in conflict with applicable federal laws and/or federal regulations. This contract will be

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binding upon the parties, their heirs, beneficiaries, and devisees of the parties hereto. The parties agree that Nueces County, Texas is the appropriate forum for any action relating to this contract. Should any party hereto retain counsel for the purpose of initiating litigation or arbitration to enforce, prevent the breach of any provision hereof, or for any other judicial remedy, then the prevailing party shall be entitled to be reimbursed by the losing party for all costs and expenses incurred thereby, including, but not limited to, reasonable attorney's fees and costs incurred by such prevailing party. This contract may be signed by its counterparts.

7.0 Notices and Reports.

7.1 All notices and reports submitted to the Agency by the Contractor pursuant to this contract shall be in writing and delivered to the attention of the following person representing the Agency:

Corpus Christi Housing Authority & Coastal Housing Partners
Attention _____
3701 Ayers Street, Corpus Christi, TX 78415
Email to: _____

7.2 All notices submitted to the Contractor pursuant to this contract shall be in writing and mailed to the attention of:

The Contractor
Attn: _____
Address _____
Corpus Christi, TX 78400
Phone Number: _____
Email: _____

8.0 Disputed Billings (Charges).

8.1 **Procedures:** The Agency shall pay the undisputed portion of such billing and initiate the dispute-resolving procedures, as follows:

8.1.1 The Agency's representative shall, within 10 days after the Agency's receipt of such billing, formally notify the Contractor's representative of all particulars pertaining to the dispute, and request that he/she investigate and respond to this issue.

8.1.2 If such dispute cannot be resolved by the Contractor's response, within 10 days after such notification is given, the CO and the Contractor's representative shall meet to discuss the matter and attempt to arrive at a resolution.

8.1.3

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8.1.3 If the CO and the Contractor's representative are unable to resolve the dispute through such discussion within 10 days, the Agency shall, within 10 days thereafter, either:

8.1.3.1 Pay the disputed charges and reserve the right to submit the matter to the appropriate District Court in the State of Texas.

8.1.3.2 Not pay the disputed charge and submit the matter to the Appropriate district court in the State of Texas.

8.1.3.3 Not pay the disputed charge and allow the Contractor to submit the matter either to the appropriate District Court in the State of Texas.

8.1.4 The decision from arbitration will be binding upon both parties. If the decision is averse to the Agency, the Agency shall pay the Agency's receipt of the decision. If the decision is in favor of the Agency, the Contractor will either:

8.1.4.1 Clear the amount which is ordered from the Agency account; or

8.1.4.2 Repay the Agency the amount ordered.

8.1.4.3 Either option shall be completed within 10 days after the Contractor's receipt of the arbitrator's decision.

9.0 Breach of Contract. The Agency and the Contractor each agree to comply with the following Provisions:

9.1 Remedies for Contractor Breach. Pertaining to contract-related issues, it is the responsibility of both the Agency and the Contractor to communicate with each in as clear and complete a manner as possible. If at any time during the term of this contract the Agency or the Contractor is not satisfied with any issue, it is the responsibility of that party to deliver to the other party communication, in writing, fully detailing the issue and corrective action (please note that the Agency has the right to issue unilateral addendums to this contract, but the Contractor does not have the same right). The other party shall, within 10 days, respond in writing to the other party (however, the Agency shall retain the right to, if conditions warrant, require the Contractor to respond in a shorter period of time). Further, the Agency shall, at a minimum, employ the following steps in dealing with the Contractor as to any performance issues:

9.1.1 If the Contractor is in material breach of the contract, the Agency may promptly invoke the termination clause and terminate the contract for cause. Such termination must be delivered to the Contractor in writing and shall fully detail all pertinent issues pertaining to the cause of and justification for the termination, and the date upon which such termination becomes effective.

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9.1.2 Prior to termination, the Agency may choose to warn the Contractor, verbally or in writing, of any issue of non-complaint or unsatisfactory performance. Such written warning may include placing the Contractor on probation, thereby giving the Contractor a certain period to correct the deficiencies or potentially suffer termination. The Agency shall maintain in the contract file a written record of any such warning detailing all pertinent information. If the Contractor does not agree with such action, the Contractor shall have ten 10 days to dispute or protest, in writing, such action; if he/she does not do so within the 10-day period, he/she shall have no recourse but to accept and agree with the Agency's position on the issue. The written protest must detail all pertinent information pertaining to the dispute, including justification detailing the Agency's alleged incorrect action(s).

9.1.3 After termination, if the Contractor does not agree with the Agency's justification for the termination, the Contractor shall have 10 days to dispute, in writing, such action; if he/she does not do so within the 10-day period, he/she shall have no recourse but to accept and agree with the Agency's position on the issue. The written protest must detail all pertinent information pertaining to the dispute, including justification detailing the Agency's alleged incorrect action(s).

9.2 Termination for Cause and Convenience. The Contracting Officer may terminate the contract in whole, or in part, whenever the Contracting Officer determines that such termination is in the best interest of the Agency. Such termination must be delivered to the Contractor in writing and shall fully detail all pertinent issues pertaining to the cause of and justification for the termination, and the date upon which such termination becomes effective.

10. Additional Consideration.

10.1 Right of Joinder.

10.1.1 Any political subdivision within the State of Texas (or any other jurisdiction within the United States) may be granted the privilege of joining the awarded contract, only at the option of the Contractor. If the Contractor so grants such a privilege, the terms, and conditions of the contract documents, including the ensuing contract, may be passed on to the joining political subdivision by the Contractor.

10.1.2 The Contractor shall retain the unilateral right to allow or disallow any political subdivision the privilege of joining the awarded contract. In the event the Contractor allows another political subdivision to join the Agency contract, it is expressly understood that the Agency shall in no way be liable for the joining political subdivision obligations to the Contractor in any manner whatsoever.

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- 10.2 Non-Escalation.** The unit prices reflected on the contract shall remain firm with no provision for price increases during the term of the contract, unless for economic reasons the Contractor must request in writing price increase adjustment 60 days prior to the contract renewal date. Contractor must provide documentation for price increase adjustment to the Contracting Officer.
- 10.3 Funding Restrictions and Order Quantities.** The Agency reserves the right to reduce or increase estimated or actual quantities in whatever amount necessary without prejudice or liability to the Agency, if:
- 10.2.1** Funding is not available.
 - 10.2.2** Legal restrictions are placed upon the expenditure of monies for this category of service or supplies; or,
 - 10.2.3** The Agency's requirements in good faith change after award of the contract.
- 10.4 Local, State, and/or Federal Permits.** Unless otherwise stated, all local, State or Federal permits, which may be required to provide the services ensuing from award of this contract, whether or not they are known to either the Agency or the contractor, shall be the sole responsibility of the Contractor.
- 10.5 Taxes.** All persons doing business with the Agency are hereby made aware that the Agency is exempt from paying Texas State Sales and Use Taxes and Federal Excise Taxes. A letter of Tax Exemption will be provided upon request.
- 10.6 Government Standards.** It is the responsibility of the bidder to ensure that all items and services proposed conform to all local, State and Federal law concerning safety (OSHA and NOSHA) and environmental control (EPA and County Pollution Regulations) and any other enacted ordinance, code, law, or regulation. The Contractor shall be responsible for all costs incurred for compliance with any such possible ordinance, code, law, or regulation. No time extensions shall be granted or financial consideration given to the Contractor for time or monies lost due to violations of any such ordinance, code, law, or regulations that may occur.
- 10.7 Freight on Bill and Delivery.** All costs submitted by the bidder shall reflect the cost of delivering the proposed items and/or services to the locations(s) specified within the documents of the contract.
- 10.7.1** The Contractor agrees to deliver to the designated location(s) on or before the date as specified in the finalized contract. Failure to deliver on or before the specified date constitutes an event of default by the Contractor. Upon default, the Contractor agrees that the Agency may, at its option, rescind the finalized contract under the default clause herein and seek compensatory damages as provided by law.
- 10.8 Backorders.**

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- 10.8.1** The Contractor must notify the CO in writing within 10 days of any and all backordered materials and/or any incomplete services; and the estimated delivery date.
- 10.8.2** Unless otherwise stipulated in the contract, any order that will take more than a maximum of 10 days past the original agreed upon delivery date, may at the option of the Agency, be canceled and ordered from another source, if, in the opinion of the CO, it is in the best interests of the Agency to do so.
- 10.9 Work on Agency Property.** If the Contractor's work under the contract involves operations by the Contractor on Agency premises, the Contractor shall take all necessary precautions to prevent the occurrence of any injury to persons or property during the progress of such work and, except to the extent that any such injury is caused solely and directly by the Agency's negligence, shall indemnify the Agency, and their officers, agents, servants and employees against all loss which may result in any way from any act or omission of the Contractor, its agents, employees, or subcontractors.
- 10.10 Official, Agent and Employees of the Agency Not Personally Liable.** It is agreed by and between the parties hereto that in no event shall any official, officer, employee, or agent of the Agency in any way be personally liable or responsible for any covenant or agreement herein contained, whether either expressed or implied, nor for any statement, representation or warranty made herein or in any connection with this agreement.
- 10.11 Subcontractors.** Unless otherwise stated, the Contractor must inform the Agency of any use of subcontractors on the project.
- 10.12 Salaries and Expenses Relating to the Contractors Employees.** Unless otherwise stated, the Contractor shall pay all salaries and expenses of, and all Federal, Social Security taxes, Federal and State Unemployment taxes, and any similar taxes relating to its employees used in the performance of the contract. The Contractor further agrees to comply with all Federal, State, and local wage and hour laws and all licensing laws applicable to its employees or other personnel furnished under this agreement.
- 10.13 Attorney's Fees.** In the event that litigation is commenced by one party hereto against the other in connection with the enforcement of any provision of this agreement, the prevailing party shall be paid by the losing party all court costs and other expenses of such litigation, including reasonable attorneys' fees. The amount so allowed as attorneys' fees shall be taxed to the losing party as costs of the suit, unless prohibited by law.
- 10.14 Independent Contractor.** Unless otherwise stated, the Contractor is an independent Contractor. Nothing herein shall create any association, Agency, partnership, or joint venture between the parties hereto and neither shall have any authority to bind the other in any way.

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10.15 Severability. If any provision of this agreement or any portion or provision hereof applicable to any particular situation or circumstance is held valid, the remainder of this agreement or the remainder of such provision (as the case may be), and the application thereof to other situations or circumstances shall not be affected thereby.

10.16 Waiver of Breach. A waiver of either party of any terms or condition of this agreement in any instance shall not be deemed or construed as a waiver of such term or condition for the future, or of any subsequent breach thereof. All remedies, rights, undertakings, obligations, and agreements contained in this agreement shall be cumulative and none of them shall be in limitation of any other remedy, right, obligation or agreement of either party.

10.17 Time of the Essence. Time is of the essence under this agreement as to each provision in which time of performance is a factor.

10.18 Limitation of Liability. In no event shall the Agency be liable to the Contractor for any indirect, incidental, consequential, or exemplary damages.

10.19 Indemnification.

10.19.1 The Contractor shall indemnify, defend, and hold the Agency (and its officers, employees, and agents) harmless from and against any and all claims, damages, losses, suits, actions, decrees, judgments, attorney's fees, court costs and other expenses of any kind or character, which are caused by, arise out of, or occur due to any failure of the Contractor to (1) abide by any of the applicable professional standards within its industry, or (2) comply with the terms, conditions, or covenants that are contained in this contract, (3) comply with the "Texas Industrial Insurance Act," or any other similar law, ordinance, or decree; or (4) ensure that the any subcontractors abide by the terms of this provision and this contract; provided, however, that Contractor will not be required to indemnify the Agency against any loss or damage which was specifically caused by the Agency providing inaccurate information to the Contractor, failing to provide necessary and requested information to the Contractor, or refusal to abide by any recommendation of the Contractor.

10.19.2 In this connection, it is expressly agreed that the Contractor shall, at its own expense, defend the Agency, its officers, employees, and agents, against any and all claims, suits or actions which may be brought against them, or any of them, as a result of, or by reason of, or arising out of, or on account of, or in consequence of any act or failure to act the consequences of which the Contractor has indemnified the Agency. If the Contractor shall fail to do so, the Agency shall have the right, but not the obligation, to defend the same and to charge all direct and incidental costs of such defense to the Contractor including attorney's fees and court costs.

10.19.3 Any money due to the Contractor under and by virtue of this contract, which the Agency believes must be withheld from the Contractor to protect the Agency, may be retained by the Agency so long as it is reasonably necessary to ensure the Agency's protection; or in case no money is due, its surety may be

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held until all applicable claims have been settled and suitable evidence to that effect furnished to the Agency provided, however, neither the Corporation's payments shall not be withheld, and its surety shall be released, if the Contractor is able to demonstrate that it has adequate liability and property damage insurance to protect the Agency from any potential claims.

10.19.4 The Contractor shall provide that any contractual arrangement with a subcontractor shall be in conformance with the terms of this Contract including the terms of this indemnity provision. The Contractor guarantees that it will promptly handle and rectify any and all claims for materials, supplies and labor, or any other claims that may be made against it or any of its subcontractors in connection with the contract.

11 Appendices.

11.19 The following noted documents are placed under each of the noted appendixes and are a part of this contract:

11.19.2 Contract Appendix No. 1. _____

11.19.3 Contract Appendix No. 2. _____

11.20 **Order of Precedence.** Please note that, in the case of any discrepancy between this contract and any of the above noted appendixes, the requirement(s) detailed within the body of this contract shall take first precedence, then the requirement(s) detailed within each appendix shall take precedence in the order that they are listed above (meaning, the requirement(s) detailed within the lower listed item may not overrule any requirement(s) detailed within a higher listed item).

12 **CERTIFICATIONS.** The undersigned representative of each party hereby acknowledges by signature below that they have reviewed the foregoing and understand and agree to abide by their respective obligations as defined herein:

The Contractor:

By: _____ Date: _____
Name and Title

CCHA:

By: _____ Date: _____
Name and Title