

Pre-Proposal Meeting

**Home Improvement & Preservation Program
Management System**

February 15, 2018



Philadelphia Housing Development Corporation

Agenda



- Overall Guidelines
- PHDC Background
- Scope of Work
- RFP Requirements
- Procurement Schedule
- Q&A

Overall Guidelines



- Please fill out the sign-in sheet; this is our record of attendance at the pre-proposal meeting and will be used to distribute information
- The RFP is the official source of information, including the posted responses to submitted questions
 - Information provided today is not binding
 - Please provide all questions in writing prior to 5:00pm local Philadelphia time on March 2, 2018
- PHDC may, at its sole discretion, issue addenda to this RFP containing any revisions, clarifications, or other matters PHDC deems appropriate. Addenda will be communicated to applicants via email and posted on PHDC website
 - For more details, see RFP *Section 3.1.3 – Addenda to the RFP; Requests for Information; Inconsistencies*
- Proposals must be submitted to Stephen Cavicchio (stephen.cavicchio@phila.gov) by 5:00pm local Philadelphia time on March 23, 2018

PHDC Background – Overview



Mission: Improving the lives of low-income residents of Philadelphia by using grant funding to make homes more structurally sound, energy-efficient, mechanically safe, and accessible.

Structure: PHDC's Home Improvement and Preservation Programs (HIP) award grants to eligible Philadelphia residents to make homes more structurally sound, energy-efficient, mechanically safe, and accessible.

- *AMP (Adaptive Modification Program)* – Home/apartment adaptations to help individuals with permanent physical disabilities live more independently at home
- *BSRP (Basic Systems Repair Program)* – Basic repairs to the electrical, plumbing and heating systems; may also provide roof replacements if major interior damage is evident
- *WAP (Weatherization Assistance Program) Standard* – Weatherization and energy-efficiency improvements
- *WAP (Weatherization Assistance Program) Crisis* – Heaters for families experiencing issues during cold weather periods of the year

PHDC Background – Functional Roles



PHDC employs staff in different units to serve its grant recipients in all aspects of the case management life cycle. These units and basic responsibilities are:

- **Hotline/Intake:** Fields calls from potential grant recipients and generates expressions of interest to determine initial eligibility
- **Dispatch:** Schedules home visits for inspection
- **Inspection:** Performs home inspections to determine whether repairs can be made based on predetermined criteria; verifies work completion
- **Orientation:** Meets with potential grant recipients at PHDC office and determines eligibility based on income, disability, and case severity
- **Budget:** Assigns work to contractors and processes invoices for payment
- **Admin Support:** Assists indirectly with case management responsibilities
- **Finance:** Responsible for invoice, change order, and voucher processing
- **Compliance and Archiving:** Performed by various staff members after services have been performed

PHDC Background – Current Systems



PHDC relies on a mission-critical system that houses the bulk of data compiled from the agency's daily and strategic operations.

- Text-based application written in RPG and supported on an AS/400 platform accessible by various agency desktop PC's
- Developed in the 1980s, largely from scratch
- AS/400 has basic coding built into it that allows PHDC personnel to 'triage' cases based on various factors

The AS/400 supports the following two modules:

- **HIP (Home Improvement Programs)** – Contains two sub-modules that support HIP operations: *BSRP* and *WAP Standard*
 - The HIP module supports the majority of users within PHDC
- **Finance** – The finance module (also known as *HTE*) supports the activities of the Finance Department. HTE Finance module contains sub-modules that support such functions as:
 - Accounts Receivable
 - Cash Receipts
 - General Accounting
 - Global Financials

PHDC Background – Data Sources



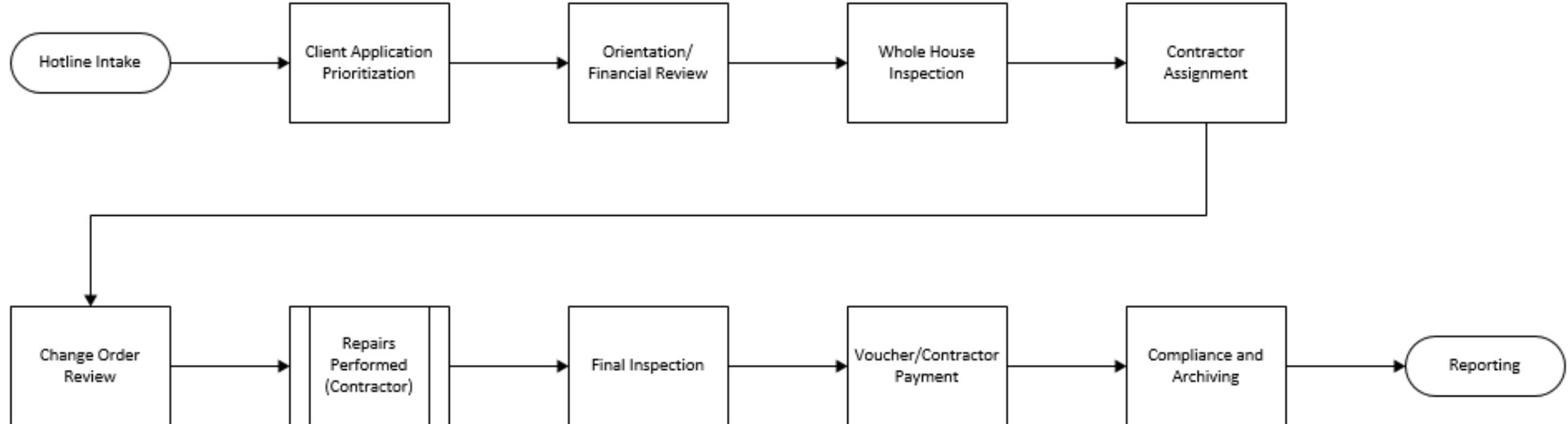
Data elements are mapped to 7 different databases within the AS/400. Case management information is currently spread across multiple applications that were developed to address shortcomings of the AS/400 system. These applications include:

- **Microsoft Access** – houses AMP Program data
- **Microsoft Word and Excel** – used for case support/tracking of all programs at various stages in the case management life cycle
- **Microsoft Outlook** – used for scheduling home inspections
- **Home Improvement Portal** – application used to perform inspections on homes to determine if services can be rendered to the home and what those services should be
- **Hancock** – state-wide case management system that supports PHDC's WAP program; external system owned by the Commonwealth of Pennsylvania; PHDC staff manually re-enter data into this system as there is currently no interface with AS/400
- **CATS (Central Application Tracking System)** – database developed internally and used to determine eligibility for the various HIP programs; also used to track the various ownership documents needed and whether or not they have been submitted
- **Paper** – Paper files are often the most complete historical case record for a given case

PHDC Background – Process Summary



Below is a high-level process flow of the general case management life cycle. Detailed process maps are contained in *Appendix L – Business Process and Synopsis Report* for each respective HIP and Financial process.



Scope of Work – Overview



PHDC is accepting proposals to develop, design, and implement a system to manage its client cases, associated contract work orders, and related general accounting processes.

- Design and configure/develop solution that is a comprehensive replacement of the existing system(s)
- Install solution and provide installation documentation
- Implement solution to meet business requirements
- Migrate data from current system
- Integrate data from existing applications, spreadsheets, and other data sources
- Provide annual maintenance, ongoing support, software updates and upgrades, training, and other services as required by PHDC

PHDC's preference is for a commercial, off the shelf (COTS) solution. However, PHDC would also be willing to accept a "from-scratch" solution. PHDC would also be interested in seeing both internally and cloud-hosted solutions.

No computer hardware or other equipment, and no network or computer installation services (such as cabling or physical installation of equipment) will be purchased under any contract resulting from this RFP.

Scope of Work – Project Requirements



Detailed requirements for the new system and/or services sought by this RFP are provided in *Appendix A – Detailed Project Requirements*. These include:

- Discovery/Requirements Analysis Requirements
- Cultural Change Management Requirements
- Functional/Technical Requirements

In addition, there are specific business-process requirements (or outcomes) required for the success of this project.

- Required outcomes can be found in *Appendix L – Business Process and Synopsis Report* for each respective HIP and Financial process.

RFP Requirements



Proposals must satisfy all requirements set forth in this RFP. Any proposal that does not adhere strictly to RFP requirements may be rejected as not responsive to the RFP without further consideration.

Participation of Disadvantaged Business Enterprises

- The Office of Economic Opportunity has approved the following projected ranges of participation for this Notice of Contracting Opportunity, which serve as a guide in determining each applicant's responsibility relative to any proposed subcontractors:

Minority Business Enterprise (MBE): 10 - 15%

and/or

Woman Business Enterprise (WBE): 10 - 15%

- Complete requirements and conditions can be found in *Appendix F*

Procurement Schedule



Activity	Date
Submit questions, requests for clarification, information to primary contact in writing	Friday, March 2, 2018 by 5:00pm EST
Response to questions posted	Friday, March 9, 2018
Deadline for proposal submission	Friday, March 23, 2018 by 5:00pm EST
Presentation of top three ranked proposals	Week of April 16, 2018
Notice of intent to contract	Friday, May 18, 2018
Project start date	Monday, July 2, 2018

Note – these dates are estimates only and PHDC reserves the right, in its sole discretion, to alter this schedule as it deems necessary or appropriate.

PHDC Primary Contact



The contact information for PHDC's primary contact for this RFP is as follows:

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Information Technology Manager

Office of Innovation & Technology

Philadelphia, PA 19107

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