



**ARLINGTON COUNTY, VIRGINIA  
OFFICE OF THE PURCHASING AGENT**

**REQUEST FOR PROPOSALS NO. 24-CPHD-RFP-479**

**ADDENDUM NO. 2**

Arlington County Request for Proposals No. 24-CPHD-RFP-479 for Multi-Purpose Housing Servicing Software is amended as follows:

**A. THE SOLICITATION HAS THE FOLLOWING UPDATES:**

1. The solicitation deadline (closing date) has been extended to **March 26, 2024, at 3:00 p.m.** this will allow offerors to review the answers below and to timely complete your proposals.
2. Add Attachment 2 – The w9 form must be completed and submitted along with your proposal. The information in the proposal form must be consistent with the w9 submitted.

**B. THE COUNTY HAS RECEIVED QUESTIONS IN RESPONSE TO THE RFP. The questions and responses are as follows:**

**Question 1. Single-Sign-On (SSO) Integration: Which Single-Sign-On (SSO) platform does the County use? Are there any specific requirements or configurations needed for integrating with the existing Microsoft login accounts?**

Answer 1. The County uses Microsoft Azure AD (now called “Entra ID”). There are no specific requirements or configurations outside of what the RFP states other than that any SSO must be compatible with Azure/Entra ID.

**Question 2. Application Submission Process: What are the specific requirements for the online application submission process? Are there any validation rules or workflows to be implemented?**

Answer 2. There are no requirements. The County is interested in what vendors can offer as solutions to the Scope of Services.

**Question 3. Customizable Questions and Evaluation Criteria: Can you provide examples of the types of customizable questions and evaluation criteria that County staff may need to include?**

Answer 3. There are no requirements. The County is interested in what vendors can offer as solutions to the Scope of Services.

**Question 4. Project and Financial Management: Are there any specific reporting requirements**

**for project management and financial management functionalities?**

Answer 4. There are no requirements. The County is interested in what vendors can offer as solutions to the Scope of Services.

**Question 5. Loan Servicing Functions: Can you provide more details on the range of loan servicing functions required? Are there any specific workflows or integrations needed for these functions?**

Answer 5. Loan servicing functions typically include tracking disbursements and payments, accumulating interest, estimating payoffs based on an “as of” date, storing various key loan dates and project information, separating principal and interest amounts, and pulling data on the number of loans, the amount of money loaned out, total loan amount by funding source, loans by owner, etc.

**Question 6. Reporting and Report-Building: What are the specific requirements for portfolio and individual account reports? Are there any specific data visualization or dashboard requirements?**

Answer 6. There are no requirements. The County is interested in what vendors can offer as solutions to the Scope of Services.

**Question 7. Technical Assistance and Training: What specific technical assistance and training materials are required for County staff, applicants, and reviewers?**

Answer 7. The County has not specified any type of technical assistance or training materials. The County is interested in seeing what vendors can provide as solutions.

**Question 8. Customer Service Response Times: Are there any specific service level agreements (SLAs) or response time requirements for urgent requests?**

Answer 8. There are no SLAs. Response time for urgent requests should not exceed 24 hours (see section IV, subset B (page 15)).

**Question 9. Training Manuals/User Guides: Are there any specific formats or requirements for the training manuals or user guides?**

Answer 9. There are no specific formats or requirements for the training manuals or user guides. The County is interested in seeing what vendors can provide as solutions.

**Question 10. Can you please share the current Data volumes for the data that would need to be migrated?**

Answer 10. It is hard to give an accurate answer for this answer as our data sits in many places. However, data would include a couple hundred loans (multifamily and single-family) and all loan history. For grants, roughly 30 proposals and all application data from the last 5-6 fiscal years would need to be migrated to a new system. This includes application narratives, budget, reporting criteria, and documents.

**Question 11. Can you please share high level number of users needing to use the system (Internal, External)?**

Answer 11. The County estimates having 10-12 internal users and 50 external users.

**Question 12. SSO Integration: What specific requirements does the County’s Single-Sign-On (SSO)**

- platform have for integration?**
- Answer 12. Any integration must be compatible with Microsoft Azure AD (now called "Entra ID").
- Question 13. User Account Management: Are there specific roles and permissions required for different user types? How many user types are there?**
- Answer 13. The County estimates having 10-12 internal users and 50 external users. All internal users should have access to the entire solution. External users should have limited access to sections applicable to them. For example, external users applying for grants should only have limited access to the grants management section of the solution.
- Question 14. Customizable Questions: What level of customization is needed for application questions?**
- Answer 14. Question-type (multiple-choice, short answer, etc.); wording of questions and answers, etc.
- Question 15. Budget Detailing: What specific features are required for applicants to detail their submission's budget?**
- Answer 15. There are no requirements. The County is interested in what vendors can offer as solutions to the Scope of Services.
- Question 16. Data Storage and Retrieval: What are the specific requirements for data storage, retrieval, and user work continuation?**
- Answer 16. While there are no specific requirements, the County is looking for any data to be readily available to internal staff year over year (at least six years, per the RFP) and for both internal and external users to return to where they were working last. For example, an external user applying for a grant or loan should be able to leave an application in an unfinished stage but be able to come back to it easily. The County is also interested in seeing what vendors can provide as solutions.  
Please refer to item 23 in the RFP (Data Security and Protection) for more detailed information.
- Question 17. Review and Scoring System: What functionalities are required for the review and scoring system?**
- Answer 17. There are no requirements. The County is interested in what vendors can offer as solutions to the Scope of Services.
- Question 18. Project Management Features: What specific project management features are required for funded proposals?**
- Answer 18. There are no requirements. The County is interested in what vendors can offer as solutions to the Scope of Services.
- Question 19. Financial Management: What specific features are required for financial management, including invoicing and payment notifications?**
- Answer 19. There are no requirements. The County is interested in what vendors can offer as solutions to the Scope of Services.
- Question 20. Application Status Tracking: What details are needed for application status tracking?**

Answer 20. There are no requirements. The County is interested in what vendors can offer as solutions to the Scope of Services.

**Question 21. Preview and Organizing Applications: What functionalities are required for previewing and organizing applications?**

Answer 21. There is no requirement for this purpose; however, the County is interested in seeing what vendors can provide.

**Question 22. Evaluation and Scoring Accessibility: How should evaluations, notes, and scoring be managed and accessed by multiple users?**

Answer 22. Admin users should be able to both manage applications and score proposals. Unlimited number of reviewers that score. Also, should allow for users that are able to view (but not score) proposals without being an admin user.

**Question 23. Mass Communication: What are the specific requirements for sending mass emails to applicants?**

Answer 23. There are no specific requirements outside of what is detailed in the RFP. The County is interested in what vendors can offer as a solution when evaluating proposals.

**Question 24. Security and Data Protection: What level of security and data protection is required for the system?**

Answer 24. The level of security and data protection is listed in the Contract Terms and Conditions in the RFP (sub-section 23).

**Question 25. Reporting Capabilities: What specific reporting capabilities are needed, especially in relation to CDBG and CSBG data?**

Answer 25. There are no requirements. The County is interested in what vendors can offer as solutions to the Scope of Services.

**Question 26. User Interface Requirements: Are there specific user interface requirements or standards that need to be followed?**

Answer 26. There are no specific requirements or standards that need to be followed. The County is interested in seeing what vendors can provide as solutions.

**Question 27. Technical Support and Training: What are the expectations for technical support and training for County staff?**

Answer 27. Please refer to the RFP for details on technical support and system maintenance (please see Section IV, subsection B (page 15)).

**Question 28. Scalability and Future Enhancements: How should the system be designed to accommodate future enhancements or changes in requirements?**

Answer 28. The County is not anticipating any future enhancements or changes in requirements to this RFP. However, should a vendor want to demonstrate those options in their response, that is fine.

**Question 29. Provide notices regarding any user error in the application, review or reporting process. - In what way? Email?**

Answer 29. Email is fine.

**Question 30. How many emails in general should the system send out? Approx number of unique**

- emails**
- Answer 30. The County anticipates sending over several emails out of the system a year (combined, for all purposes).
- Question 31. "The ability to customize the acknowledgement message is strongly preferred. " – clarify**
- Answer 31. The County sends messages to potential grantees or responders to the NOFA that their application has been received. This message should be customizable.
- Question 32. Multifamily Loan Portfolio Management Loan Setup Process: What specific functionalities are required for setting up loans with varying terms and conditions?**
- Answer 32. The ability to set different interest rates, term lengths, sources, and owners is necessary for the portfolio. Additionally, the ability to add a "construction period" to a loan at a different interest rate is of interest.
- Question 33. Loan Activity Monitoring: What details should be included in monitoring loan activities (e.g., disbursements, interest accruals)?**
- Answer 33. Loan servicing functions typically include tracking disbursements and payments, accumulating interest, estimating payoffs based on an "as of" date, storing various key loan dates and project information, separating principal and interest amounts, and pulling data on the number of loans, the amount of money loaned out, total loan amount by funding source, loans by owner, etc.
- Question 34. Repayment Tracking: How should loan repayments be tracked and reported within the system and via exports?**
- Answer 34. No requirement for how this information is tracked.
- Question 35. Interest and Principal Calculations: What are the requirements for on-demand and daily calculations of principal and interest?**
- Answer 35. Users must be able to enter an "as of date" into the system and receive a payoff estimate at any time. The system should reflect up to date principal and interest information based on the most recent data in the system.
- Question 36. Funding Source Management: How should the system manage and report on different funding sources?**
- Answer 36. There are no requirements. The County is interested in what vendors can offer as solutions to the Scope of Services.
- Question 37. Customizable Fields: What types of customizable fields are needed for additional project and loan data?**
- Answer 37. Affordability periods, unit composition breakdown by unit size and income restriction (AMI), notes section, # of Type A units, # of PSH units, general notes field.
- Question 38. Reporting Capabilities: What specific features are required for standard and customizable portfolio reports?**
- Answer 38. There are no requirements. The County is interested in what vendors can offer as solutions to the Scope of Services.
- Question 39. Export Formats: What specific requirements are there for exporting data to PDF and**

- Excel formats?**
- Answer 39. There are no requirements outside of data should be exportable to PDF and/or Excel.
- Question 40. Equipment and Software Needs: Are there any additional equipment or software requirements for the system?**
- Answer 40. No additional requirement needed.
- Question 41. Data Migration: What are the specifics of migrating data from ATRACK to the new system?**
- Answer 41. The County's Housing team will work with the County's Department of Technology Services to migrate the data.
- Question 42. User Interface Design: What are the specific user interface requirements for managing loans and data?**
- Answer 42. Intuitive design that makes pulling reports, entering data, and calculating interest simple.
- Question 43. Data Security and Privacy: What are the security and privacy requirements for handling loan data?**
- Answer 43. No specific requirements
- Question 44. System Integration: How should the system integrate with existing financial and administrative systems?**
- Answer 44. This is a system/solution consideration and not a requirement. The County uses Oracle for its financial needs. Any integration with Oracle is nice to have but not required. This will be replacing current multifamily tools MITAS and Atrack and does not need to integrate after data migration.
- Question 45. User Accessibility: What are the accessibility requirements for different types of users?**
- Answer 45. Internal users should have full access to all sections of the solution. External users should only have limited access to sections applicable to their needs (grant applicants only having access to the grants application/management section, for example).
- Question 46. Customization Flexibility: To what extent does the system need to be customizable?**
- Answer 46. The County is looking for public facing parts of the solution to be fully customizable (i.e., questions and question types for applications; emails; etc.). On the internal side, the County is looking for the ability to customize reports, etc. Please refer to the RFP and Scope of Services for more information on what the County is looking for in customization (Section IV, subsection A (pages 12 – 14)).
- Question 47. Performance Metrics: What performance metrics should the system track and report?**
- Answer 47. There are no requirements. The County is interested in what vendors can offer as solutions to the Scope of Services.
- Question 48. Technical Support Requirements: What are the expectations for technical support**

- and system maintenance?**
- Answer 48. Please refer to the RFP for details on technical support and system maintenance (please see Section IV, subsection B (page 15)).
- Question 49. Scalability: How should the system be designed to handle future expansion or changes in loan portfolio size?**
- Answer 49. The County continually adds on new loans – the system should be designed to allow for the addition of new loans. At this time, the County is not expecting to add any modules, etc., outside of what is detailed in the RFP.
- Question 50. Compliance and Regulatory Requirements: Are there specific compliance or regulatory requirements that need to be addressed?**
- Answer 50. No.
- Question 51. Backup and Recovery: What are the backup and recovery requirements for the system?**
- Answer 51. Please refer to item 23 in the RFP (Data Security and Protection).
- Question 52. User Training: What kind of training will be required for County staff to use the new system effectively?**
- Answer 52. The kind of training is dependent on the vendor and what they find is the best way for their customers to learn and efficiently use their product.
- Question 53. Real-time Data Processing: Does the system need to support real-time data processing and updates?**
- Answer 53. No specific requirement for multifamily
- Question 54. Notification System: What types of notifications (e.g., payment due, discrepancies) should the system generate?**
- Answer 54. There are no requirements. The County is interested in what vendors can offer as solutions to the Scope of Services.
- Question 55. API Integration: Are there any external systems or APIs the new system needs to integrate with?**
- Answer 55. No.
- Question 56. Cloud-based or On-premises: Will the system be cloud-based or on-premise, and what are the implications for either choice?**
- Answer 56. The system should be cloud-based.
- Question 57. Audit Trails: What level of audit trail and history tracking is required for loan transactions?**
- Answer 57. No specific requirement for multifamily.
- Question 58. Accessibility on Different Devices: Does the system need to be accessible on various devices (mobile, tablet, desktop)?**
- Answer 58. The system needs to be accessible on desktop.
- Question 59. Data Visualization: Are there specific requirements for data visualization within the**

- system?**  
Answer 59. No. The County is more interested in what solutions vendors can demonstrate.
- Question 60. Language and Localization: Does the system need to support multiple languages or localization features?**  
Answer 60. No.
- Question 61. Testing and Quality Assurance: What are the requirements for testing and quality assurance before deployment?**  
Answer 61. The County assumes that any web-based system has been tested and checked for quality assurance. Having a “what you see is what you get” option when accessible sections are edited or before the County sends out mass communications is preferred.
- Question 62. How many administrative users will be accessing this system?**  
Answer 62. Approximately 10 – 12.
- Question 63. How much data do you currently have that needs to be migrated?**  
Answer 63. It is hard to give an accurate answer for this answer as our data sits in many places. However, data would include a couple hundred loans (multifamily and single-family) and all loan history. For grants, roughly 30 proposals and all application data from the last 5-6 fiscal years would need to be migrated to a new system. This includes application narratives, budget, reporting criteria, and documents.
- Question 64. Please make a list of all specific features which you are using in each of these: zoom grant/ amerinet and midas, so we could refer to them while working on the estimate to visualize the complexity of the features.**  
Answer 64. Please refer to Answer 94 and sections three (III) and four (IV) of the RFP for detailed language on the functions and services we use these systems for and what we are looking for in a new solution. Please note that the selection advisory committee will be evaluating and scoring against the criteria in the RFP rather than our current systems.
- Question 65. Can you explain what specific information needs to be migrated?**  
Answer 65. Data would include a couple hundred loans (multifamily and single-family) and all loan history. For grants, roughly 30 proposals and all application data from the last 5-6 fiscal years would need to be migrated to a new system. This includes application narratives, budget, reporting criteria, and documents.
- Question 66. How many grants do you plan on administering?**  
Answer 66. The County administers approximately 35 grants a year.
- Question 67. What is your budget for this solution?**  
Answer 67. The County does not share budget information for RFPs.
- Question 68. If the software platform completes edits to the application for modifications, would**



**a test site still be a preferred request for this RFP?**

Answer 68. The County is looking for a web-based solution rather than a software platform. Having a “what you see is what you get” option when accessible sections are edited is preferred.

**Question 69. Should vendors list exceptions in the response or redline the County's terms and conditions?**

Answer 69. Our preference is to list exceptions separately and if the vendor is invited as a top ranked offeror, we may request to have the redline completed. Also reference page 17 Section B, for provisions that may not take exceptions.

**Question 70. Would the County be open to any video content that may be provided by the vendor?**

Answer 70. Per the RFP section V “Proposal requirements”, any submission must be sent via Vendor Register and videos may not be able to be submitted.

**Question 71. It was mentioned that County is looking for Grants Management Service - Section III-1.a. - Is this custom solution or turn key software with Configuration?**

Answer 71. The County is looking for a solution that best aligns with the scope of work in the RFP.

**Question 72. How many grants application do we receive in the current scenario. It was mentioned over 30 non profit entities apply for grants, Is it one application per entity or more than one per entity?**

Answer 72. The system should be able to accommodate multiple applications per entity.

**Question 73. If Custom Grants Management system is solicited or preferred, do we have any timeline planned for implementation and go live dates?**

Answer 73. No timeline has been established but the County expects for training and data transfer to begin as soon as a contract is signed with full-functionality available at that time.

**Question 74. How many external users (applicants) and internal users currently use the current system?**

Answer 74. There are currently four systems being used. Among these four, there are approximately 10-12 internal users and 40 external users.

**Question 75. If there is any existing grant management system, can you provide the name of the current system and pain points or preferred features in the new systems?**

Answer 75. The County currently uses ZoomGrants. Preferred features of a new system are detailed in the RFP under the Scope of Services section.

**Question 76. Do we have the count of total number of loan applications received on each application type during the last few FY and how many reviews will be reviewing these applications?**

Answer 76. The only type of loan applications the County receives that would be used in this solution is part of the multifamily NOFA process (please see the RFP for details on this process). The County typically receives no more than 10 applications and is reviewed by six to eight users.

**Question 77. Do you currently have any content management systems which county is using for**

- Answer 77. **the current systems for document storage or looking for one as part of the solution?**  
The County does have a content management system. However, for this RFP, we are looking for a cloud/web-based solution on which documents can be stored.
- Question 78. Inline with Custom and Turn Key, are you also looking for existing similar applications for Single and Multi Family Loan Process?**
- Answer 78. The County is looking for a solution that best aligns with the scope of work in the RFP.
- Question 79. Is there any requirement on the SaaS cloud platform software to be FedRamp and SOC3 compliant?**
- Answer 79. No.
- Question 80. What is the overall preferred schedule to implement this solution from the County perspective?**
- Answer 80. The County has not determined a preferred schedule but would like to get full access to the solution as soon as data and training can occur.
- Question 81. Is there any preferred Budget allocated?**
- Answer 81. The County does not disclose budgets for active RFPs.
- Question 82. Any preference or allocation to MBE set-aside?**
- Answer 82. Currently the County does not have any set asides.
- Question 83. Minimum qualifications on the Vendor/Supplier proposing the solution.**
- Answer 83. Please refer to the RFP under Mandatory Requirements (page 17).
- Question 84. Do we have to provide price, schedule, architecture on the solution?**
- Answer 84. The RFP includes a cost summary sheet that must be submitted with all proposals. The County will not be evaluating on the schedule or architecture on the solution *unless* it relates back to one of the items in the scope of work.
- Question 85. We do not see any weightage on the pricing in the evaluation criteria, is it part of any of the listed criteria?**
- Answer 85. Price is not an evaluation criterion.
- Question 86. Do we have to price the infrastructure separately and implementation separately?**
- Answer 86. Please include all costs/prices on the cost/pricing sheet located in the RFP.
- Question 87. Is Arlington County seeking a production-ready software (Commercial Off-The-Shelf COTS) or are you open to custom-built software tailored to your specific needs?**
- Answer 87. The County is seeking an automated cloud-based, online system (per the RFP). However, all eligible proposals will be evaluated.
- Question 88. If in the event of custom software development, could you please provide insight into the expected timeline for its development? Additionally, when does Arlington County anticipate the software to be operational in the production environment?**
- Question 88. No timeline has been established but the County expects for training and data transfer to begin as soon as a contract is signed with full-functionality available at that time.

**Question 89. What is the required Cloud provider (Azure, Google GCP, AWS, etc.) that the application must operate in?**

Question 89. There is no required Cloud provider.

**Question 90. What is the volume of data in ATRACK? How many databases and tables associate with that system? Does it require to migrate them into the new system? What do you mean "pull the County's existing data within ATRACK"? Does it mean that there is an established database connection or API service to interact with that system? Where is it currently deployed (on-premises or in the cloud)?**

Question 90. ATRACK is a low volume application with limited internal data for loan management. There is one database with 79 tables of data to be migrated. It will be a standard data transfer from an SQL database with no API in the middle. It is currently on premises.

**Question 91. What is the software that is currently in use for Grants Management? If so, what are the reasons that Arlington County is seeking a new one? What are the PROs and CONs of that software? How long has that software been used? What is the name of the company who is providing that software to Arlington County? Why doesn't Arlington County request them to customize their software to meet your needs? What were the costs of using that software in the last 3 years?**

Answer 91. The County currently uses ZoomGrants for grants management. Per the RFP, the County is looking to move all its housing system/software servicing needs under one contract. Our needs for this portion of the solution can be found in the RFP. The County has contracted with this vendor for several fiscal years. ZoomGrants is not a software company. The County's contract amount is approximately \$6,500/year.

**Question 92. What is the range of the budget to develop or buy a new software?**

Answer92. The County does not share budget information for RFPs.

**Question 93. Does Arlington County want the new software to be native applications running on mobile (iPhone and Android), tablets (iPad, Android Tablet) and web application running on popular browsers?**

Answer 93. Any solution should be compatible with desktop computers and common browsers found on desktop computers (Edge, Chrome, Safari, Firefox, etc.).

**Question 94. We have the CSMS functional requirements pdf + HMIS functional requirements pdf. ??Could we get a set of the main functionality used in <https://www.midasnyc.com/pay-online.html> / Zoom Grant/ AmeriNet to refer to these HMIS + CSMS documents and visualize the system you need?**

Answer 94. The County uses Mitas as opposed to Midas. However, Mitas is used for multifamily loan portfolio data management, ZoomGrants is used for the Housing division's grants management system and multifamily loan application system, and AmeriNat is used for single-family loan servicing. Please refer to section three (III) and four (IV) of the RFP for detailed language on the functions and services we use these systems for and what we are looking for in a new solution.

**Question 95.** What would be the best approach to work on the estimate? To estimate the features in the CSMS PDF and HMIS pdf and refer to zoom grant/ amerinet and midas for visual help?

Answer 95. The selection advisory committee will be evaluating and scoring all proposals against the criteria laid out in the RFP. We are looking for vendors to present their solutions to the scope of work. We will not be evaluating any proposals against our current systems, including any visuals.

The balance of the solicitation remains unchanged.

Arlington County, Virginia

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**OFFEROR ACKNOWLEDGES RECEIPT OF ADDENDUM NUMBER 2.**

**FIRM NAME:** \_\_\_\_\_

**AUTHORIZED SIGNATURE:** \_\_\_\_\_ **DATE:** \_\_\_\_\_