

**HOUSING AUTHORITY OF THE COUNTY
OF SANTA CRUZ**

REQUEST FOR PROPOSALS

APPLICATION SOFTWARE

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I. Introduction

A. Purpose of RFP

The Housing Authority of the County of Santa Cruz (“Authority” or “HACSC”) wishes to select application software for the following application areas:

<ul style="list-style-type: none">• General Ledger• Accounts Payable• Accounts Receivable• Fixed Assets• Budget Preparation and Forecasting• Budget Control• Cash Management• Purchasing• Contract Management• Housing and Property Inspections• Payroll and Human Resources	<ul style="list-style-type: none">• Job Costing• Client Management & Services (Applications, Wait list, Certifications, Social Services, Case Management)• Grant Management• Construction Management• Property Management (leases, unit mgt, billing, inspections and maintenance)• HUD Program Reporting and Compliance• Web-based self service• Tax Credit Compliance
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As part of the selection process, this document is being provided to qualified vendors to solicit their proposed solutions for software that best meets the Authority’s current and future information needs. This RFP will serve as a foundation for evaluating the features, functions and associated costs of each of the recommended alternatives.

B. Proposal Scope

The vendor is to provide a proposal that encompasses the following:

1. Applications software features and functions
2. Systems software technical configuration
3. Hardware technical specifications
4. Design/development of modifications to application software, if required
5. Implementation assistance / Training
6. On-going support

Estimated costs associated with each of the above items must be included in the proposal.

C. Schedule of Activities

The following schedule outlines the approximate time frame of the activities that will be followed to assist in the selection of the vendor. The schedule, except for the deadline for receiving proposals, is subject to change. The Authority may also deem some of the activities to be unnecessary and may choose not to conduct some or all of the activities listed below:

1. Issue RFP date	August 19, 2010
2. Last day for clarification/questions	September 2, 2010
3. Proposal due date	Sept. 14, 2010 5 p.m.
4. Short List date	September 20, 2010
5. On-site demo period	October 4-7, 2010
6. Off-site visitation	October 18-21, 2010
7. Board Approval of contract	November 17, 2010
8. Implementation commencement	January 3, 2011

D. HACSC Housing Authority Background

The Housing Authority of the County of Santa Cruz (HACSC) is a Public Housing Agency. The Authority has 234 units of Low Rent Public Housing, 2 USDA farm worker housing sites with a combined total of 70 units, and a 6 unit Transitional Housing site, which it owns and operates. HACSC administers approximately 3856 Section 8 Housing Choice Vouchers, 100 Disabled Vouchers, 85 Moderate Rehabilitation units, and 11 Moderate Rehabilitation SRO units. Additionally, it administers the Housing Choice Voucher program (344 units) for the Housing Authority of the City of Hollister and a 106 unit Migrant Farm Worker housing center for the State of California. HACSC also manages several grant programs, including the Capital Fund Program for the modernization of Public Housing units, Resident Opportunity and Self Sufficiency (ROSS), and several Shelter Plus Care grants. The Authority is also the managing partner of a 15 unit tax credit housing project, and administers affordable housing programs for several local jurisdictions including security deposit and first time homebuyer programs.

It is management's objective to integrate all Authority property management and financial functions into the new system, thereby minimizing the existence of duplicate systems and eliminating most or all of the stand-alone systems and databases. The system needs to support the needs of the entire enterprise and provide data to support decision-making as the Authority moves to a new operational model.

E. Current Operating Environment (Systems)

Currently the operation's core software is run on an HP ProLiant server. The Authority's existing hardware & software configuration consists of:

a) Hardware

Server	HP ProLiant DL360 G5 Server (Xeon 5430, 4GB RAM, 2 x 72GB HDD)
Clients	Personal computers with Intel Core 2 Duo, Dual Core, Pentium 4, Pentium D, processors. Speed varies from 750 Mhz to 3.2 Ghz.

b) Software

Personal computers	Windows XP and Windows 2003 Server TS sessions.
LAN	Windows 2003 Server Active Directory
Remote	LAN and WAN clients connect via VPN over internet.

II. Proposal Conditions

A. Proposal Due Date and Addressee

Respondents must submit one (1) original hard copy and the completed Word and Excel Documents on CD to:

Housing Authority of the County of Santa Cruz
2931 Mission Street
Santa Cruz, CA 95060

All proposals are to be placed in a sealed envelope and marked:

“Sealed Proposal Enclosed”
“Software System”

Proposals must be received by **Monday, September 14, 2010 at 5:00 p.m.** All proposals that are not received by the deadline will be considered late and will be returned to the proposer unopened. Elaborate, bound proposals are not desired. Submissions received by fax will not be accepted.

B. Contacts

Please direct all inquiries for additional information regarding the Housing Authority of the County of Santa Cruz to the following individuals.

Pam Smith	Housing Authority Finance Director	Phone: (831) 454-5915
Nick Mothersole	Computer Analyst	Phone: (831) 454-5936

The deadline for submitting such questions in writing is **September 2, 2010 at 5:00 p.m.** If in the Purchasing Agent's opinion, additional information or interpretation is necessary, such information will be supplied in the form of an Addenda that will be mailed to all individuals, firms, etc., having received this Request for Proposal from Purchasing and such Addenda shall have the same binding effect as though contained in the main body of the Request for Proposal. Oral instructions or information concerning the specifications of the project given out by Authority managers, employees, or agents to prospective proposers shall not bind the Authority. All Addenda shall be issued by the Purchasing Agent not less than five (5) calendar days prior to the proposal deadline.

Please direct any questions regarding additional clarification on the proposal requirements to Pam Smith, Housing Authority Finance Director, who will be responsible for insuring that your requests are addressed in a timely manner. Questions posed by you, and our responses, may be distributed to all responding vendors.

c. Proposal Format

All proposals should follow the format provided below. Responses will be reviewed for completeness prior to detailed evaluation. A response submitted in a manner that makes evaluation unnecessarily time consuming may be eliminated from further consideration. Please note that an electronic copy of the RFP (MS Word files *Software RFP.doc* and *Software RFP questionnaire.doc*) has been provided, which should save significant time for you as well as us. We require the proposal in both hardcopy and CD format. **(Fill out the electronic file then print the hard copy)**. Elaborate, bound proposals are not desired. We are more interested in proposal quality, brevity and clarity.

- An individual who is authorized to bind the vendor(s) contractually must sign the vendor's Transmittal Letter.
- The vendor must specify how long product and service pricing will be valid (a minimum of 90 days will be required).
- The vendor response should include the following information in the order indicated:
 1. **Introduction** - Provide a brief non-technical overview of the vendor's business including the range of products and services offered by the vendor.
 2. **Vendor Information** - Response to questions concerning vendor credentials as specified in Section III.
 3. **General and Technical Requirements** - Response to report writer, system software, hardware specifications and other technical questions as specified in Section IV.
 4. **Application Requirements** - Responses to application requirements as specified in Section V.
 5. **Customer Service and Support** - Responses to education, implementation, maintenance, documentation and other customer service/support questions as specified in Section VI.
 6. **Investment Considerations** - Detail and summary of fees and costs as specified in Section VII.
 7. **References** - Vendor is required to submit a minimum of three (3) customer references as specified in Section VIII.
 8. **Appendix** - Product information such as brochures, demo diskettes, course catalogs and other material that contributes value to the response document.

D. Evaluation Criteria

The following are the criteria that will be used in evaluating the submitted proposals. They are listed in order of importance. As some vendor's software functionality may not be applicable to the full scope of the RFP, please note that evaluations will be performed on a module-by-module basis as defined in the functional requirements.

Criteria	Points Available
Degree to which the package fits functional requirements (on a modular basis) listed in the RFP without requiring modification	20
Vendor qualifications and financial stability	10
Implementation timing and ease, system adaptability to change and expand	15
Support services including maintenance, new releases, hot lines and responsiveness	15
Total three year cost of ownership / Terms of Sale	15
Implementation services including application training, conversion assistance, etc.	10
Technical direction of the vendor(s) (i.e., research & development, future releases)	10
Customer references	5
Total Points	100

E. Terms and Conditions

The following are terms and conditions to which the vendor must adhere:

1. The vendor must keep information both published and unpublished confidential and not disclose such information or make it available to third parties.
2. An officer of the business capable of binding the offer must sign proposals.
3. The Authority reserves the right to reject any or all responses to this RFP.
4. Proposer must comply with all applicable requirements of federal and state civil rights law and rehabilitation statutes.
5. The Authority strongly encourages the participation of Minority, Women and Emerging Small Businesses in this and all Authority projects, programs and services.
6. Costs incurred by the vendor in preparing or submitting the proposal are the responsibility of the respondent and will not be reimbursed by the Authority.
7. In case of any doubt or differences of opinions as to the items or services to be furnished hereunder, or the interpretation of the provisions of the RFP, the decision of the Authority shall be final and binding upon all parties.
8. Neither the resultant contract nor any of the requirements, rights, or privileges demanded by it may be sold, assigned, contracted, or transferred by the Contractor without the express written consent of the Authority.
9. A Proposer, submitting a Proposal hereby certifies that no officer, agent, or employee of the Authority has a pecuniary interest in this Proposal; that the Proposal is made in good faith without fraud, collusion, or connection of any kind with any other Proposer; the Proposer is competing solely in its own behalf without connection with, or obligation to, any undisclosed person or firm.
10. Any publicity giving reference to this project, whether in the form of press releases, brochures, photographic coverage, or verbal announcement, shall be only with the general or specific approval of the Authority.

F. Appeals

Proposers may appeal only deviations from laws, rules, regulations, or procedures. Disagreement with the process, e.g., scoring by evaluators, is not appealable. The following procedure applies to applicants who wish to appeal a disqualification of proposal or award of contract:

1. Applicants shall submit appeal, in writing, to the Purchasing Agent. Appeals must be received by the Purchasing Agent no later than 4:00 p.m. on the fifth (5th) working day after the postmarked Notice of Award or disqualification.
2. Address appeal to: Appeal must specify the grounds for the appeal including the specific citation of law, rule, regulation, or procedure upon which the protest is based. The judgment used in scoring by individual evaluators is not grounds for appeal.
3. Appeals not filed within the time specified in paragraph 1., above, or which fail to cite the specific law, rule, regulation, or procedure upon which the appeal is based shall be dismissed.

III. Vendor Information

1. Identify the individual(s) in your organization who will be our contact(s) throughout the evaluation process. Please include name, title, mailing address, e-mail address and both voice and fax phone numbers.
2. What is your primary business? Provide a short history of your business, including when it was founded, any major milestone events and a product list.
3. Discuss the factors that differentiate your system from systems offered by other vendors.
4. How many employees does your business have in each functional area (sales, customer support, implementation, R&D, etc.)?
5. Did you design and develop the proposed software or are you marketing the proposed system for another vendor or third party? If marketing, who designed the system and who will provide on-going support?
6. How many customers do you have in total? How many in the Pacific Southwest region?
7. Please specify the range of seats installed at your client base. What is your average number of seats?
8. How many customers do you have in the Property management arena? In the Housing Authority arena?
9. What is the average portfolio size of your Property management/Housing Authority customers?
10. What is the average number of leases managed by your Property management/Housing Authority customers?
11. *Housing Authority and Property Management vendors only:* What is the average number of public housing units, Section 8 subsidies and the corresponding range for your customer base?
12. *Housing Authority and Property Management vendors only:* Is HUD a customer?
13. Who is your largest customer?
14. When was the proposed software system first installed?
15. List the North American and international locations where you have offices. Designate functions at each office (e.g., sales, support, service, etc.).
16. Do you intend to subcontract any part of the work for the proposed system? If yes, specify the percentage of the total contract to be subcontracted and identify the subcontractor organization(s). We reserve the right to approve all subcontractor participants, and will expect you to perform as the primary contractor, responsible for all subcontractor activities. Additionally, we expect you to serve as the primary contact for all issues regarding implementation of the solution. Do you agree to these terms? If no, please discuss differences.
17. Please provide a financial statement covering the last two years. Publicly held companies should also provide their most recent Annual Report.

IV. General and Technical Requirements

A. General

1. Does your system contain or interface with any E-mail systems (please list) i.e. Microsoft Exchange Server? If so, how are they linked to your product?
2. Is it possible to open multiple screens at the same time?
3. Does the system have import/export capabilities, with compatibility with MS Office? If so, please explain.
4. Does the system provide flexibility throughout to route inquiry requests directly to the screen, printer, fax, e-mail, file, etc.?
5. Does the system require or provide for any connectivity/access to the Internet? If so, please describe. Also provide details on how the system is safeguarded from any potential problems from the Internet.
6. Does the system provide complete "Drill-Down" capability on-screen (summary level to transaction level) in all areas of the application?
7. Do interfaces exist to allow for HR/Payroll accounting transactions (from a third party vendor) to be passed into the accounting system (e.g., employee time & expense reporting, accrued vacation & sick time)? If yes, please describe existing interfaces.
8. Does your system currently contain established links to any Time and Attendance packages? Please list:
9. Does your system currently contain established links to any HUD reporting packages? Please list:
10. Is your database MS SQL compliant?
11. Does your system support EDI (Electronic Data Interchange)? If so, please describe.
12. Are any third party software packages suggested and/or required with this solution (e.g., human resources, leasing, EDI, etc.)? If so, please list and describe.
13. Who supports required third party software packages?
14. Do you support OLE and DDE which allow for the edit, import and export capability of data to other commercially available packages such as Microsoft Excel and Word?
15. Does your system support ODBC?
16. If yes to #14, do ODBC drivers come with the system? If not, what is the cost?
17. Does the system support on-line data entry, inquiry and update in a global sense?
18. Does your system provide context sensitive on-line help (technical and end-user)?
19. Do you provide source code? If yes, is there a fee involved?
20. Please describe system flexibility in adding user-defined fields.
21. State your future technology direction for your software over the next three to five years.

B. Hardware/Network

Provide technical specifications on the preferred hardware configuration including all components (e.g., CPU, disk, memory, workstation, peripherals, etc.).

C. System Software

1. Provide information on the recommended operating system.
2. Describe other operating systems/environments that your system supports. Please provide any performance benchmarks.
3. Does the same functionality exist across all supported platforms?
4. Provide information regarding the recommended programming language and relational database management system. Please indicate if the purchase of the database is outside the scope of your proposal.
5. Describe other database management systems that your system supports.
6. Does your software employ a graphical user interface (GUI)? If so, please describe. Additionally, how long has your product contained a graphical user interface?

D. Reporting Requirements

1. Describe the ad hoc reporting capabilities of your system.
2. Are your files accessible to commercially available report writers? If so, please list these report writers.
3. Are these report writers required or do you provide a proprietary report writer?
4. Can standard users develop reports easily with your report writer or will they require assistance from systems personnel or a "power user"?
5. Does your report writer have the capability to export reports to Excel spreadsheets, MS Word or desktop publishing packages? Describe, in detail, how this is accomplished.
6. Can reports be scheduled?

E. History Maintenance

1. What amount of data (maximum number of years) may be kept on-line (not considering system storage limitations)?
2. Describe how your system maintains and stores historical data.
3. Can users view data for a particular point in time on-line?
4. Is an archive facility provided to purge history to Optical Storage, or other media? If so, please describe.
5. Does your system provide a facility to restore archived history to production files?
6. Does your system have built-in back-up and restore procedures for production processing?

F. Security

1. How is application security established?
2. Describe the levels of security offered by your system.
3. Does it Integrate with Microsoft Windows Active Directory?
4. Is the default user security denied or enabled?
5. Does security include groups/roles, user level security of all screen fields?
6. Can modules (Section 8, LIPH etc) be restored independently or do all modules have to be restored due to inter-module dependencies.
7. What kind of auditing features of changes by users are available and is an audit log search feature included?
8. What encryption is include in the database and network application?
9. Is biometric access supported e.g. finger print reader?
10. Is there an inactivity logout feature?
11. Is a Disaster Recovery Plan for hardware/software issues currently available? If so, please provide information.

G. Data Migration

1. Has your company migrated data from the Emphasys Flex system to your database?
2. If so how many data conversions has your company performed and for whom?
3. Was a third party consultant used to facilitate any of these conversions?

V. Application Requirements

A. Applications Overview

The Authority plans to acquire applications for all of the following areas of the business: Client Management & Services, Grant Management, Property Management (leases, unit mgt, billing, inspections and maintenance), HUD Reporting, General Ledger, Accounts Payable, Accounts Receivable, Fixed Assets, Bonds and Notes Payable Management, Budgeting, Cash Management, Purchasing, Contract Management, Case Management and Job Costing.

It **might** acquire the applications for Human Resources, Payroll, Time and Attendance, and Construction Management.

B. Instructions for Completion

For each application, a standard features/functions/requirements list has been developed. The information has been structured so that vendors can respond to the questions asked for each application by using a simple coded response scheme. For each feature or function, respond as follows:

4	Unqualified Yes. Your package meets this requirement.
3	Qualified Yes. Your package achieves the requirement in a manner that is different from the proposed or can be satisfied by an existing report writer.
2	Qualified Yes. Your package provides the capability in a planned enhancement; please indicate release date.
1	Qualified No. Requires customization with cost modification and your company is capable of performing the modification. Please provide a dollar estimate for the cost of the modification.
0	Unqualified No. Your package does not provide this functionality and customization is impractical.

Include any additional and relevant notes, explanations, or comments regardless of the response. If such comment requires additional space, indicate "See attached" and provide the direct cross-reference where the comment is found.

Special Note: The requirements as set forth in this RFP are meant to be a guide to vendors as to the needs of the Authority. It is understood that vendors may provide features not specified in this RFP that will be beneficial to the Authority. Please clearly mark or highlight these items.

C. Application Area Requirements

Please refer to the MS Excel File, "Software RFP questionnaire.xls". Please respond only to the application areas for which your product has functionality.

VI. Customer Service and Support

A. Customer Support Services

1. Describe in detail the customer support services that are provided by your business.
2. Will we be assigned an account representative who will work with us through implementation?
3. Is a hotline telephone service part of your support? During what hours is this service available? Is there an additional charge for this service? How are support calls prioritized?
4. Do you ever charge extra for telephone support if the reported problem is a customer / user problem and not a software problem?
5. Do you provide an electronic Bulletin Board service or Internet Site with FAQs (Frequently Asked Questions), software patches, device drivers, etc.?
6. Is there a formal User Group for your products? Describe the relationship between the User Group and your organization: times they meet, etc. Are there user conferences or training events? Describe.
7. Do you offer consulting services to assist a business in defining, designing and implementing custom enhancements to your system? Are the consultants your own employees or do you recommend third parties? How many consultants are available in the Pacific Souththwest area?
8. How often is your software updated? When is the next scheduled update?
9. Describe your business' policy on modifications that might be made to your system by a customer after initial installation. What impact would such customer modifications have on your system's warranty? On future releases?

B. Customer Education

1. Describe the training / education options available to your customers.
2. Can training be provided on-site or at a location of our choice?
3. Describe any on-line tutorials available with your system.
4. Describe your "Train-the-Trainer" program.
5. Are course materials provided for each training class?
6. Describe the specific training classes available for your system. Include the length of the class, suggested attendees, a short description of the class content, and the languages the classes are provided in.
7. Please provide an Education Services Course Catalog as an appendix to your response.

C. System Installation \ Implementation

1. Provide a “high-level” implementation plan for your proposed solution so that we may estimate the time requirements in light of our specific plans.
2. Discuss the installation support that you will provide, the geographic location of staff servicing this account and the costs.
3. Discuss the technical and non-technical resources that you believe should be represented on our project team.
4. How soon can you deliver the system after contract execution?
5. Describe data conversion assistance you can provide during implementation from the current system?
6. Do you provide sample data with which to conduct system installation verification testing? Describe the testing process.
7. Describe the tools that are provided with the system to support user customization efforts.
8. Describe your ability and willingness to customize the proposed system.
9. What level of support do you provide for the conversion from our current systems to the new one?

D. System Maintenance Service

1. Is system maintenance included in the license fee for the software?
2. Describe your release schedule for maintenance updates; enhancement updates; tax/legislative updates. *Housing Authority vendors only*: How long does it take to implement new changes in HUD statutes and regulations into your software? Do you have a warranty specifying timelines?
3. Must customers request an update release or are they sent automatically?
4. Describe how you determine the content of maintenance / enhancement releases.
5. Describe how your customers influence and contribute to the content of the enhancement update.
6. How many prior releases are supported?
7. Describe the contents of your system maintenance / update releases for the previous twelve (12) months and the date each was released.
8. If a product is discontinued or your company is sold, do you have any minimum guarantees for continued product support?

E. Documentation and On-line Help

1. Describe the documentation available for your system. How many copies are provided? Are any additional copies available? At what cost? May we reproduce the documentation for our own internal use?
2. Will you provide system documentation for our review?
3. Is the documentation available on-line? How thorough is the documentation? Do you have quick reference guides?
4. Is the documentation available in electronic form so that we may customize it if needed?
5. Are all applicable documentation updates associated with an enhancement or maintenance release provided at no additional charge?

VII. Investment Considerations

List in detail and summary the costs of obtaining and utilizing the system(s) described in your proposal. Please include initial costs as well as on-going costs over the next three years for each of the following items:

1. Application software license fee by module
2. System software license fee for operating system, database, application development tools, etc.
3. Report Writer license fee
4. Training costs
5. Data conversion costs
6. Custom modification costs
7. Other implementation assistance costs (i.e., travel)
8. Miscellaneous other costs
9. Annual maintenance fees
10. Discuss what is included in the license fee and the cost of adding concurrent users.
11. Provide a schedule of fees charged for programming, consulting and other services.
12. Describe, in lay terms, the warranty policy of the proposed system.
13. Provide information on the cost of upgrades.
14. Provide a sample copy of your license agreement.
15. Describe your policy on multiple site licensing discounts.

VIII.References

Provide a complete list of current clients and a minimum of three (3) organizations that are using your proposed system and who can be contacted for reference purposes. Include the following information:

- 1. **Organization:** _____
Where Located: _____
Contact Person: _____
Contact's Title: _____
Contact's Phone Number: _____
Short system description (what installed, when, etc.): _____

- 2. **Organization:** _____
Where Located: _____
Contact Person: _____
Contact's Title: _____
Contact's Phone Number: _____
Short system description (what installed, when, etc.): _____

- 3. **Organization:** _____
Where Located: _____
Contact Person: _____
Contact's Title: _____
Contact's Phone Number: _____
Short system description (what installed, when, etc.): _____

VIII.Appendix

A. Transactions

Vendors should use the following information to assist in properly evaluating the throughput and data retention requirements:

Item	Value	Measurement
# of A/P Invoices	4,200	Per year
# of A/P Checks	2,500	Per year
# of Section 8 Landlord Checks	20,000	Per year
# of Section 8 Participants	4400	
# of Vendors	400	
# of purchase orders	250	Per year
# of Bank Accounts	20	Including CD's
# of General Ledger Funds	50	
# of GL account combinations	9,980	
# GL journal entries	1700	Per year
# Housing Authority Employees	66	
# of wait listed applicants-Santa Cruz	13,048	
# of wait listed applicants-Hollister	3,130	
# of contracts	40	Per year
# of work orders	1700	Per year
# of HUD subsidized property sites	15	Only 1 AMP
# of HUD subsidized units	234	
# tax credit housing units	15	1 site

B. System Users and Transaction Volumes

Vendors should use the following information to assist in properly evaluating the number of users who will be accessing various modules within the system. The number of concurrent users may increase in the next two to five years.

Module	“Named” Users
Client Management	43
Accounting (G\L, A\R, A\P, Cash, Payroll, Notes and Bonds)	6
Purchasing	3
Budgeting	5
Job Cost	3
Property Management	23
Grant Management	4
Report Writer	5
Human Resources	3
Contract Management	3
Construction Management	4