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Commissioner, District 5

Katherine Miller
County Manager

August 10, 2016

TO: Procurement File

FR: Bill Taylor, Procurement Manager *BT*

VIA: Joseph Montoya, County Housing Director

RE: Sole Source Determination to Purchase Software License and Service Agreement from Yardi Systems for Essential Operations of the Santa Fe County Housing Authority, at an Annual Fee of \$14,790.00.

Background:

Santa Fe Housing Authority procured the services of Yardi System for software license and service pursuant to 13-1-125, Small Purchase to provide a software system that organizes tracks and stores information on clients and services provided by the Public Housing and the Housing Choice Voucher (Section 8). The amount of this purchase was \$5,213.43.

Issue:

The original license and service agreement between Santa Fe County Housing Authority and Yardi Systems has expired. The Housing Authority is now requesting they be allowed to purchase at new License and service agreement as a sole source due to the essential HUD system and operational needs. The new agreement would procure the upgraded Voyager 7s program that would include employment training courses, counseling and other case management services that are recorded in the core Yardi Voyager PHA system and linked with resident and property management data. Yardi Voyager PHA is an end to end platform combining financial and property management information in a single, centralized database, with mobile access to leasing resident services, dashboards, and tasks from smartphones and tablets. Yardi maintains compliance and manages Housing Choice Vouchers, Public Housing, SaaS Hosting reports for HUD50059, VMS, SEMAP, PHAS, and FDS. Yardi offers streamlined 50058 and other subsidized programs in a complete single database PHA solution. Centralize operational, financial, leasing and maintenance management in a single database, including mobile platform with accounting property management.

Yardi offers three different cloud solutions for 7s clients: SaaS, Saas Select, and Private Cloud. This allows the client to determine which nimbus is right for the company's needs. No other Software System offers more than one different cloud solution, nor do they give the option to determine which nimbus is right for the company's needs. Voyager 7s has added security requirements to a host of functions that previously had none. Yardi is focused on enhancing Voyager to improve bugs and quirks daily. Yardi provides a test database for users upgrading to 7s which is what the County and the Agency needs. Yardi, PHA Web, HAPPY, and Emphasys all offer backup data to be

completed and stored by the service provider; however Yardi is the only one that offers 24 hour IT support in addition to saving and storing data. HAPPY software will provide regulatory updates guaranteed in 90 days, whereas Yardi will provide automatic updates nightly. Yardi Voyager 7S runs on any device using any browser.

Therefore, the Santa Fe County Housing Authority is requesting a sole source determination be made to continue software and maintenance support services with Yardi Systems.

Determination

After extensive due diligence by the using agency and purchasing office, the Yardi System will provide the unique technical and non-technical tracking and reporting requirements that are HUD mandated. In addition the functionality of the using agency will not be interrupted by a change with the implementation of a new software program that would require additional staff training and support.

Pursuant to 13-1-126, NMSA 1978 this Purchasing Department after conducting due diligence has made the determination that this is a sole source procurement pursuant to the NMSA 1978 13-1-126 that *“a contract may be awarded without competitive sealed bids or competitive sealed proposals regardless of the estimated cost when the state purchasing agent or a central purchasing office makes a determination, after conducting a good-faith review of available sources and consulting the using agency, that other similar services, construction or items of tangible personal property cannot meet the intended purpose of the contract.”*

Therefore, it is the determination of Santa Fe County Purchasing Office that the following services may be procured from Yardi Systems without competitive sealed bids or competitive sealed proposals:

Contractor Information and Services:

Yardi Systems, Inc.
 430 South Fairview Avenue,
 Goleta, CA 93117
 800-351-0383

Services:	Voyager SaaS Select		
Voyager PHA Property Management	493 Units @	\$20.00/Unit	\$ 9,860.00
Inspector general	493 Units @	\$ 2.00/Unit	\$ 986.00
Yardi eLearning	493 Units @	\$10.00/Unit	<u>\$ 3,944.00</u>
Annual Fee			\$14,790.00
Additional Terms:	3 year agreement	TOTAL COST OF AGREEMENT	\$44,370.00