HOMES FOR GOOD BOARD OF COMMISSIONERS MEETING
Wednesday, March 29th, 2022

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AGENDA

Homes for Good Housing Agency

BOARD OF COMMISSIONERS

Location of the meeting:
Homes for Good Administrative Building
100 W 13th Avenue
Eugene, OR 97405

Zoom

This meeting will be conducted in person with option to join via public video call and conference line (see details below).

Wednesday, March 29th, 2023, at 1:30pm

The September 28th, 2022, Homes for Good Board of Commissioners meeting will be held at the Homes for Good Administrative Building. It will also be available via a public video call with dial-in capacity. The public has the option to participate in person or by joining via video call or conference line.

Join Zoom Meeting:

https://us02web.zoom.us/j/88069630164

1. **PUBLIC COMMENTS**
   Maximum time 20 minutes: Speakers will be taken in the order in which they sign up and will be limited to 3-minutes per public comments. If the number wishing to testify exceeds 10 speakers, then additional speakers may be allowed if the chair determines that time permits or may be taken at a later time.

2. **COMMISSIONERS' RESPONSE TO PUBLIC COMMENTS AND/OR OTHER ISSUES AND REMONSTRANCE (2 min. limit per commissioner)**

3. **ADJUSTMENTS TO THE AGENDA**

4. **COMMISSIONERS' BUSINESS**

5. **EMERGENCY BUSINESS**

6. ADMINISTRATION

    A.   Executive Director Report

7. CONSENT AGENDA
    A.   Approval of 02/22/23 Board Meeting Minutes
    B.   ORDER 23-29-03-01H: In the Matter of Updating the Administrative Plan – Emergency Housing Vouchers, Service Fees

8. PRESENTATION
In the Matter of Introducing Berman Hopkins as Homes for Good's Finance Audit Firm
(Jacob Fox, Executive Director) (Estimated 30 minutes)

9. ORDER 23-29-03-02H
In the Matter of Approving the Execution of an Agreement with Yardi Systems, Inc.
(Curtis Wyant, IT Director) (Estimated 30 minutes)

10. PRESENTATION
In the Matter of the Central Office Cost Center & Public Housing Budget to Actual Reports
(Jacob Fox, Executive Director) (Estimated 30 minutes)

11. OTHER BUSINESS

Adjourn.

On February 24th I attended a resident meeting at The Commons on MLK that was led by Camryn Leland, Permanent Supportive Housing Supervisor, and Jose Soto-Gates, Resident Services Specialist. I was humbled by the beauty of the people living at The Commons on MLK and I was reminded why this apartment community is so important from a health equity perspective. The residents living in this community are engaging with staff at an unprecedented level and subsequently healing from many years of health inequities experienced through being homeless. I am extremely thankful to all of the Homes for Good staff members who are working diligently to stabilize The Commons on MLK.

On March 8th we re-introduced ourselves to the City of Florence by hosting a community meeting at the Florence Events Center. The meeting was well attended by neighbors who had received a postcard invite along with every member of the Florence City Council and staff leadership. Ela and Jordyn led the organization of the event and many staff members from across the organization helped out in the planning and the event itself. The event was organized to provide a short introduction of Homes for Good and then we staffed tables around different components of developing and operating affordable housing. We were joined by our Board Chair, Char Reavis, along with Amanda our architect and Jay from our construction company. The vast majority of the over 50 attendees were very supportive, and we were able to engage with a few attendees that had questions and constructive feedback about our development plans.

I continue to invest a significant amount of time supporting our Finance Department as they work to keep up with day-to-day duties along with the extra responsibility of making systems improvements as outlined in the Moss Adams assessment that we presented to the Board last month. As of March 16th, we've received 6 applicants for the Finance Director position. The week of March 20th we will be interviewing two candidates based on their application materials and relevant experience. The recruitment will remain open until we select a new Finance Director.

Resident kids' drawings of
what home means to them

Homes. People. Partnerships. Good.

MINUTES

Homes for Good Housing Agency

BOARD OF COMMISSIONERS

_____

Wednesday, February 22nd, 2023, at 1:30 p.m.

Homes for Good conducted the February 22nd, 2023, meeting in person at the Homes for Good administrative building and via a public video call with dial-in capacity. The public was able to join the call, give public comment, and listen to the call.

CALL TO ORDER

Board Members Present:
Char Reavis

Heather Buch

Michelle Thurston

Justin Sandoval

Pat Farr

Kirk Strohman

Chloe Tirabasso

Larissa Ennis

Joel Iboa

Quorum Met

1. **PUBLIC COMMENT**
   None

2. **COMMISSIONERS' RESPONSE TO PUBLIC COMMENTS AND/OR OTHER ISSUES AND REMONSTRANCE**
   Pat Farr will need to leave early for a conflicting engagement.

3. **ADJUSTMENTS TO THE AGENDA**
   ▪ The Orders on this month's consent agenda are to permit Homes for Good to apply for funding at OHCS. Homes for Good will return to the Board to present funding plans for these specific projects in the coming months.

   ▪ **Kirk Strohman** requested to pull Order 23-22-02-02H due to a typo

4. **COMMISSIONERS' BUSINESS**
   None

5. EMERGENCY BUSINESS
None

6. ADMINISTRATION

A. Executive Director Report

Jacob Fox discussed the needed software transition and the research the Agency has conducted in different platforms. Yardi appears to be the best suited holistically for Agency needs. Yardi is significantly more expensive than what the Agency is currently paying for HAB.

The Eugene Chamber of Commerce in collaboration with local governance, nonprofit, public sector, and businesses as a Brain Trust are strategizing how to work collectively address concerns of homelessness. It is an opportunity to discuss capacity and provide education, which has resulted in an overall positive change in the narrative and stigmas surrounding homelessness locally.

Former Finance Director, Jeff Bridgens has put in his notice. Executive Director, Jacob Fox is now interim Finance Director until the position is filled. The Finance team is working hard in collaboration with the Leadership team to maintain financial operations of the Agency and improve procedures based on the recommendations of the Moss Adams Assessment.

The Finance and Leadership team meet weekly to discuss ongoing finance questions, accounts, and operations as it pertains to each specific division. The Finance team meet weekly to deep dive into ongoing operations, account maintenance and changes as suggested by the Moss Adams Assessment.

Discussion Themes

- Members of the Chamber of Commerce Brain Trust.
- Recruitment plans for Finance Director.
- Yardi product features and benefits.
- Difference in applicant pools for Finance Director versus Chief Financial Officer.

B. Excellence Awards

Esteban Montero Chacon presented Wes Shorack's Quarter I Excellence Award to the Board.

Jacob Fox presented Kim Huynh's Quarter I Excellence Award to the Board.

7. CONSENT AGENDA
- **Approval of January 25th, 2023, Board Meeting Minutes**

- **ORDER 23-22-02-01H: In the Matter of Authorizing the Executive Director or Designee to Apply for Assistance from Oregon Housing & Community Services for the Florence Quince Street Site**

- **ORDER 23-22-02-03H: In the Matter of Authorizing the Executive Director or Designee to Apply for Assistance form the Oregon Housing & Community Services for the Naval Reserve Site**

- **ORDER 23-22-02-04H: In the Matter of Authorizing the Executive Director or Designee to Apply for Assistance from the Oregon Housing & Community Services for the Coleman**

  Vote Tabulations
  Motion: **Michelle Thurston**
  Second: **Heather Buch**
  Discussion: None
  Ayes: **Char Reavis, Heather Buch, Michelle Thurston, Justin Sandoval, Kirk Strohman, Chloe Tirabasso, Larissa Ennis, Joel Iboa, Pat Farr**
  Abstain: None
  Absent: None

  The February 22nd, 2023, Consent Agenda was approved [9/0/0]

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ORDERS:

8. **ORDER 23-22-02-02H: In the Matter of Authorizing the Executive Director or Designee to Apply for Assistance from the City of Eugene & the Oregon Housing & Community Services for the Bridges on Broadway Permanent Supportive Housing Development**
   Project Development Manager, Nora Cronin Presenting

Current Permanent Supportive Housing projects such as The Commons on MLK, The Keystone and The Nel all have third-party property managers and third-party service providers. This has created challenges to assist Residents in the way Homes for Good envisioned using the Housing First model. Homes for Good will be serve as the property manager and service provider in order to properly utilize the Housing First Harm Reduction Model.

Discussion Themes
- Typos in original board order referring to "The Coleman" to be adjusted.
- Compliance to Oregon Housing and Community Services.

Vote Tabulations

Motion: **Heather Buch**

Second: **Michelle Thurston**

Discussion: To include the corrections to typos in the Board Order

Ayes: **Char Reavis, Heather Buch, Michelle Thurston, Justin Sandoval, Kirk Strohman, Chloe Tirabasso, Larissa Ennis, Joel Iboa, Pat Farr**

Abstain: None

Absent: None

Board Order 23-22-02-05H was passed [9/0/0]

9. **ORDER 23-22-02-05H: In the Matter of Authorizing the Financing of the Lazy Days Mobile Home & R.V. Park Rebuild Near Blue River Oregon**
Executive Director, Jacob Fox & Project Development Manager, Nora Cronin Presenting

During the legislative session after the 2020 Holiday Farm Wildfires, the State of Oregon allocated $150 million to Oregon Housing & Community Services (OHCS). During Winter 2021 Homes for Good entered a purchase and sale agreement on the Lazy Days parcel. While other organizations removed all remaining debris from the parcel as a result of the wildfire, Homes for Good held regular meetings with partners to discuss the vision and plan for re-development.

While OHCS was aware of the purchase and sale agreement, Homes for Good's request for reimbursement were denied repeatedly due to issues of capacity and program shifts within OHCS. The request for reimbursement for land acquisition and incurred costs has now been approved by OHCS.

While the Executive Director has the authority to authorize IGA's between the County and the State, due to the history and circumstance of this specific IGA, it was agreed the Board should authorize this agreement between Homes for Good and OHCS.

Discussion Themes
- Details of reimbursement and donation for modular homes.
- Shift of OHCS as a rent assistance provider versus funding non-profit organizations.
- Opportunity to develop in rural Lane County.
- Mechanism for homeownership and renting to those impacted by the wildfire.
- Stipulations of the grant to ensure affordability for local residents.
- Timeline for development in addition to other development projects.

Vote Tabulations

Motion: **Heather Buch**

Second: **Chloe Tirabasso**

Discussion: None

Ayes: **Char Reavis, Heather Buch, Michelle Thurston, Justin Sandoval, Kirk Strohman, Chloe Tirabasso, Larissa Ennis, Joel Iboa**

Abstain: None

Absent: **Pat Farr**

Board Order 23-22-02-05H was passed [8/0/1]

10.ORDER 23-22-02-06H: In the Matter of Approving the Award of the Finance Audit Contract

Executive Director, Jacob Fox Presenting

Moss Adams has been the Finance auditor for the past several years. Per Homes for Good Public Contracting Policy, a new solicitation needed to be ran. Moss Adams declined to submit a proposal for the following reasons:
- Moss Adams was at capacity.
- Multiple rejected audits from HUD creating capacity issues for Moss Adams.
- Homes for Good is not imbedded within the county, creating unique complexities and a need for audit firms to be well-versed in HUD standards.

The proposal was distributed to multiple audit firms across the United States. One proposal was received from Berman Hopkins. Berman Hopkins is experience in HUD standards, a high percentage of audits accepted upon first submission and experience with Yardi.

Discussion Themes
- Cost difference.
- Geographic barriers.
- Experience with similar housing authorities (in size and programs).

Vote Tabulations

Motion: **Chloe Tirabasso**

Second: **Michelle Thurston**

Discussion: None

Ayes: **Char Reavis, Heather Buch, Michelle Thurston, Justin Sandoval, Kirk Strohman, Chloe Tirabasso, Larissa Ennis, Joel Iboa**

Abstain: None

Absent: **Pat Farr**

Board Order 23-22-02-06H was passed [8/0/1]

PRESENTATIONS:

11.Presentation: In the Matter of the PHA Annual Plan Overview & Calendar

Compliance & Data Analyst, Mira Miller Presenting

Homes for Good is required to submit a 5-year plan to HUD. The plan details the Agency's approach to managing programs and services through:

- Mission
- Goals
- Objectives
- Approach

The annual plan provides any updates or changes for the coming year as originally outlined in the 5-year plan. This plan details changes to program policy and how they meet the goals of the Agency. The two largest policy documents that will be updated are:

- ACOP (Admissions & Continued Occupancy Policy): Policy document for public housing. It informs everything from getting on the waitlist to resident tenancy.
- Administrative Plan (Admin. Plan): Policy document for programs on the Section 8 platforms such as Housing Choice Voucher (HCV) and Project Based Voucher (PBV).

The Agency's policy review goals are managed internally amongst staff, residents, and the Resident Advisory Board (RAB). The goals of the policy review are:

- Align policies with Strategic Equity Plan.
- Reduce barriers for eligibility and program success.
- Align policies across programs for resident and community partner ease of access.

Timeline

- February 2023: Orientation with RAB
- March 2023: Proposed Policy changes with RAB
- April 2023: Review policy documents and HUD forms with RAB
- May 2023: Document is published for public comment and hearing.
- June 2023: Public Hearing and Board presentation.
- July 18, 2023: Deadline to submit to HUD for approval.

[Refer to the February 2023 Board Packet for the slideshow presentation]

Discussion Themes

- Feedback from stakeholders

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No action needed.

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12. **Presentation: In the Matter of the Family Self-Sufficiency Program & Focus Groups Presentation**
Supportive Housing Director, Wakan Alferes & Resident Services Manager, Emily Yates Presenting

The Family Self-Sufficiency Program (FSS) is based on coaching and asset building for residents.

FSS in the Strategic Equity Plan (SEP):

- Focus on expanding access for communities of color.
- Explore "auto-enrollment" and other methods for expanding participation.
- Expand access to Home Ownership Opportunities

Listening Sessions were held to engage with FSS eligible residents that did not participate in the program and past FSS participants. It was an opportunity to provide education on recent HUD changes and to receive feedback.

Next Steps:

- Continuing moving forward on the SEP.
- Continue increasing the number of eligible participants.
- Implement Moving to Work (MTW) flexibility.

[Refer to the February 2023 Board Packet for the slideshow presentation]

Discussion Themes

- Reasoning for opting out.
- Internship programs

No action needed.

13. **Presentation: In Matter of the Finance Division Moss Adams Assessment**
Executive Director, Jacob Fox Presenting

Moss Adams is Homes for Good's outgoing auditor but is also currently under contract with Homes for Good to assess the performance and organization of the Finance Division. The recommendations of Moss Adams were provided in a detailed report and a table to outline the overarching recommendations.

[Refer to the February 2023 Board Packet for the Moss Adams recommendation table]

Discussion Themes

- Recruiting for permanent staff

No action needed.

14. **Other Business**
None

Meeting adjourned at 3:45 p.m.
Minutes Taken By: Jasmine Leary

BOARD OF COMMISSIONERS AGENDA ITEM

HOMES FOR GOOD
HOUSING AGENCY

BOARD MEETING DATE: 03/29/2023

AGENDA TITLE: In the Matter of Introducing Berman Hopkins as Homes for Good's Finance Audit Firm

DEPARTMENT: Executive

CONTACT : Jacob Fox   **EXT:** 2527

PRESENTER: Jacob Fox   **EXT:** 2527

ESTIMATED TIME : 30 minutes

- [ ] ORDER/RESOLUTION
- [ ] PUBLIC HEARING/ORDINANCE
- [x] DISCUSSION OR PRESENTATION (NO ACTION)
- [ ] APPOINTMENTS
- [ ] REPORT
- [ ] PUBLIC COMMENT ANTICIPATED

Approval Signature

EXECUTIVE DIRECTOR: _(signature)_   **DATE:** 03/21/2023

LEGAL STAFF :   **DATE:**

MANAGEMENT STAFF: **DATE:**

Audit Introduction

Presented by:
Laura Anne Pray, CPA, Partner

BERMAN HOPKINS
—— CPAs & ASSOCIATES, LLP ——

*"Bringing Solutions and Prosperity
to Our Clients Since 1958."*

ABOUT OUR FIRM

- ◆ A full-service CPA Firm, established in Brevard in 1958.

- ◆ 2 offices with 85 expert staff at your service

- ◆ HUD Group = *A special dedicated team of experts*

- ◆ Clients across the country

- ◆ A firm with **national resources and capabilities** through various memberships

- ◆ Committed to **Client Service** beyond the normal audit

Our client service model

PROACTIVE

Berman Hopkins practices proactive service by keeping our clients up-to-date on issues that will affect them in the future. We assist our clients in preparing for and implementing any rules or regulations before they are required to comply. In addition, we offer governmental focused accounting & auditing CPE classes to our clients which covers any current or upcoming changes in pronouncements and guidance.

PROMPT

Berman Hopkins understands the need for prompt service. We take deadlines very serious and are proud to state we have never missed a reporting requirement for our clients. We ensure our clients have the access they need to our engagement team members. We use a team staffing approach so that multiple points of contact exist for our clients in the event the primary point of contact is unavailable. Our Firm has a policy of returning phone calls, e-mails and other communication within the same day of receipt.

PERSONAL

Berman Hopkins hires competent professionals to meet and exceed the expectations of our clients. We are not, though, all about business. We believe that gaining an understanding of and taking an interest in the goals, pursuits and accomplishments of our clients fosters a sense of camaraderie and understanding and, ultimately, a more productive relationship. Our involvement in PHA Associations allows us to provide trainings at conferences as well as the ability to support the PHA industry as a whole. Our Firm also sponsors golf tournaments, banquets and various other fund-raising events hosted by our clients.

3

PHA AUDIT DEPARTMENT

◆ Partners have 45 years of cumulative experience.

◆ Board member of a local Housing Authority

◆ Extensive experience with:

- o GASB Pronouncements

- o Governmental audit compliance requirements & regulations

◆ Governmental Training both internally & externally.

◆ Internally developed and successful test procedures.

EXPERTISE & EXPERIENCE

◆ Heavily involved in NAHRO nationally and regionally

  ◆ present trainings and provide webinars

◆ Involved with AICPA GAQC – Government Audit Quality Center

◆ State and Local Government Chapter of the FICPA

  ◆ Review and respond to Exposure drafts

◆ Government Finance Officer Association

  ◆ Government Accounting Standards Board

AUDIT TEAM

We commit to maintaining the same staffing throughout the years of the contract.

◆ Full-time team of 15 dedicated professionals.

◆ Additional staff available if necessary to the audit procedures.

◆ Hired & trained specifically for governmental audits.

◆ Committed to continuing education for team members.

◆ Current on upcoming pronouncements & laws.

◆ Low turnover = dedicated, well organized and cooperating team.

AUDIT PLAN

◆ Performing the audit in a remote environment

  ◆ Weekly check-in calls with key audit contacts

  ◆ Regular status updates for team

◆ Early April – audit planning and requests

◆ Late April – initial evaluation of financials, additional requests made

◆ Early May – compliance testing (HCV)

◆ Mid May – financial testing

◆ Early June – draft financial statements

DELIVERY OF SERVICE & COMMITMENT

Exit Conference:

◆ Meet with members of management.

◆ Discuss any open items, issues, concerns or findings.

◆ Provide suggestions to improve future close out procedures.

◆ Follow up with management on questions or concerns, if any.

◆ Stay involved until delivery accepted by proper agencies.

EXPERTISE & EXPERIENCE

◆ Municipal Auditor License

   ◆ Meet all requirements

   ◆ Signed up for the annual required course (May)

BOARD OF COMMISSIONERS AGENDA ITEM

HOMES FOR GOOD
HOUSING AGENCY

BOARD MEETING DATE: 03/29/2023

AGENDA TITLE: Updating the Administrative Plan - Emergency Housing Vouchers, Service Fees

DEPARTMENT: Rent Assistance Division

CONTACT : Beth Ochs   **EXT:**

PRESENTER: TBD   **EXT:**

ESTIMATED TIME : 15min

- ☑ ORDER/RESOLUTION
- ☐ PUBLIC HEARING/ORDINANCE
- ☐ DISCUSSION OR PRESENTATION (NO ACTION)
- ☐ APPOINTMENTS
- ☐ REPORT
- ☐ PUBLIC COMMENT ANTICIPATED

Approval Signature

EXECUTIVE DIRECTOR: **DATE:** 03/21/2023

LEGAL STAFF :   **DATE:**

MANAGEMENT STAFF: **DATE:**

HOMES FOR GOOD MEMORANDUM

TO: Homes for Good Board of Commissioners

FROM: Beth Ochs, Rent Assistance Division Director

TITLE: Updating the Administrative Plan – Emergency Housing Vouchers, Service Fees

DATE: March 29, 2023

MOTION:

It is moved that the Homes for Good Board of Commissioners approve to revise the policy on time frames for when service fees for Emergency Housing Vouchers (EHV) can be accessed.

DISCUSSION:

A. Issue

Applicants and tenants are requesting to access service fees outside the current allowable window. Homes for Good is requesting to expand the window to access the service fees.

B. Background

In July of 2021 Homes for Good was awarded Emergency Housing Vouchers from HUD. Currently, Homes for Good has 184 EHV vouchers.

The vouchers came with service fee funds.

This is the first time HUD issued such fees with tenant-based voucher assistance.

The current policy allows the service fees (up to 2K per family) to be accessed starting from when the voucher is issued and ending before the execution of the Housing Assistance Payment Contract. Once the HAP contract has been executed, the service fees are no longer accessible.

Per HUD, the service fee funds can provide assistance with:

Housing search assistance, which may include activities such as, but not limited to, helping a family identify and visit potentially available units during their housing search, helping to find a unit that meets the household's disability-related needs, providing transportation and directions, assisting with the completion of rental applications and PHA forms, and helping to expedite the EHV leasing process for the family.

Application fees/non-refundable administrative or processing fees/refundable application deposit assistance.

Holding fees are fees an owner requests that are rolled into the security deposit after an application is accepted but before a lease is signed. The PHA may cover part or all of the holding fee for units where the fee is required by the owner after a tenant's application has been accepted but before the lease signing. The PHA and owner must agree how the holding fee gets rolled into the deposit, and under what conditions the fee will be returned. In general, owners need to accept responsibility for making needed repairs to a unit required by the initial

housing quality standards (HQS) inspections and can only keep the holding fee if the client is at fault for not entering into a lease.

Security deposit assistance. The amount of the security deposit assistance may not exceed two months' rent to owner. The PHA may pay the security deposit assistance directly to the owner or may pay the assistance to the family. If paid to the family, the PHA will require documentation that the family paid the security deposit.

Utility deposit assistance/utility arrears. The PHA may provide utility deposit assistance for some or all of the family's utility deposit expenses. Assistance can be provided for deposits (including connection fees) required for the utilities to be supplied by the tenant under the lease. The PHA may pay the utility deposit assistance directly to the utility company or may pay the assistance to the family. If paid to the family, the PHA will require documentation the family paid the utility deposit. The PHA will not require the utility supplier or family to return the utility deposit assistance to the PHA at such time the deposit is returned by the utility supplier (less any amounts retained by the utility supplier). In addition, some families may have large balances with gas, electric, water, sewer, or trash companies that will make it difficult if not impossible to establish services for tenant-supplied utilities. The PHA may also provide the family with assistance to help address these utility arrears to facilitate leasing.

Moving expenses (including move-in fees and deposits). The PHA may provide assistance for some or all of the family's reasonable moving expenses when they initially lease a unit with the EHV. The PHA will not provide moving expenses assistance for subsequent moves.

Tenant-readiness services. The PHA may use fees to help create a customized plan to address or mitigate barriers that individual families may face in renting a unit with an EHV, such as negative credit, lack of credit, negative rental, or utility history, or to connect the family to other community resources (including COVID-related resources) that can assist with rental arrears.

Essential household items. The PHA may use services fee funding to assist the family with some or all of the costs of acquiring essential household items such as tableware, cooking equipment, beds or bedding, and essential sanitary products such as soap and toiletries.

C. Analysis

Since inception 147 EHV families have accessed service fees.

Currently, 165 EHV vouchers are being utilized.

Homes for Good's Intake staff reports receiving communications from EHV families that moving into the unit and then obtaining essential household items would be easier to navigate, especially in instances where furniture is being obtained. The Intake team reports receiving these communications within two weeks of the family moving into the unit.

Modifying the policy would allow families to move into units and then access the service fees.

As of March 2023, $275,041.00 of service fee funds are available for use.

D. Furtherance of the Strategic Equity Plan

This proposed change furthers the Strategic Equity Plan's goal of "listen to our communities" and the first tactic under this goal related to developing new client engagement systems to seek guidance on programmatic improvements.

E. Alternatives & Other Options

Homes for Good could choose a different time frame for accessing the service fees or add different time frames to different service fee categories. For ease of administration and applicant/tenant understanding of the process there is value to keeping the access window the same for all the fees.

The proposed language would expand the window to within 30 days of the Housing Assistance Payment start date. This allows time for the family to settle into the new unit, and still access the service fees.

For continued monitoring of future advertising of the service fee funds there is value to not expand past the

currently proposed 30 days. If the window was greatly expanded, for example 90 days past the execution of the HAP Contract it is possible Homes for Good could find itself in a situation where service fees have been communicated to the family as an option, but then are not accessible due to depletion of the funds.

As of now, Homes for Good monitors the level of service fee funding and will revise communications about availability of the funds if/when needed.

F. <u>Timing & Implementation</u>

Following Board Approval:

Homes for Good will update its Administrative Plan.

G. <u>Recommendation</u>

Homes for Good recommends the board approve the request to expand the window in which EHV applicants/tenants can access service fee funds from "prior to execution of the HAP being executed" to "within 30 days of the start date of HAP".

H. <u>Follow Up</u>

None

I. <u>Attachments</u>

None

IN THE BOARD OF COMMISSIONERS OF THE

HOMES FOR GOOD HOUSING AGENCY, OF LANE COUNTY OREGON

ORDER 23-29-03-01H | In the Matter of Updating the Housing Choice Voucher Administrative Plan, Emergency Housing Vouchers, Service Fees

WHEREAS Homes for Good may modify the policy on when Emergency Housing Vouchers, Service Fees can be utilized under PIH 2021-15.

NOW IT IS THEREFORE ORDERED THAT:

The Housing Choice Voucher Administrative Plan for Fiscal Year 2023 shall be revised as follows:

Page TPS-6 is amended to state under Service Fees,

Service Fees must be accessed within 30 days of the start date of the Housing Assistance Payment Contract.

DATED this 29th day of March 2023

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Chair, Homes for Good Board of Commissioners

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Secretary, Homes for Good Board of Commissioners

BOARD OF COMMISSIONERS AGENDA ITEM

HOMES FOR GOOD — HOUSING AGENCY

BOARD MEETING DATE: 03/29/2023

AGENDA TITLE: In the matter of approving the execution of an agreement with Yardi Systems, Inc.

DEPARTMENT: Executive

CONTACT : Curtis Wyant, cwyant@homesforgood.org   **EXT:**

PRESENTER: Curtis Wyant   **EXT:**

ESTIMATED TIME : 30 minutes

- ☑ **ORDER/RESOLUTION**
- ☐ **PUBLIC HEARING/ORDINANCE**
- ☐ **DISCUSSION OR PRESENTATION (NO ACTION)**
- ☐ **APPOINTMENTS**
- ☐ **REPORT**
- ☐ **PUBLIC COMMENT ANTICIPATED**

Approval Signature

EXECUTIVE DIRECTOR: **DATE:** 03/21/2023

LEGAL STAFF :   **DATE:**

MANAGEMENT STAFF: **DATE:**

HOMES FOR GOOD MEMORANDUM

TO: Homes for Good Board of Commissioners

FROM: Curtis Wyant, IT Director

TITLE: In the Matter of Approving the Execution of an Agreement with Yardi Systems, Inc.

DATE: March 29, 2023

MOTION:

It is moved that the Homes for Good Board of Commissioners approve the form of agreement with Yardi Systems, Inc., and authorize the Executive Director to enter into that agreement and carry out its terms.

DISCUSSION:

A. Issue

Homes for Good's software needs have grown beyond the capacity of its current software, HAB HMS. The current software was procured and implemented in 2004-2005 and has not significantly changed since then. The agency suffers from lack of institutional knowledge about the product and its capabilities. There are also no modern features available with HAB HMS, such as web portals for residents, electronic signatures, and so on. For these reasons, the Board should approve a major software upgrade to replace HAB HMS with Yardi Voyager. The cost of Yardi over five years is significant, especially compared to HAB HMS, but we know from experience that you get what you pay for and implementing Yardi Voyager would vastly improve staff and client experiences with the agency via better communication tools, less mail and manual data entry, better financial reporting, and will increase staff capacity to perform other work.

B. Background

Homes for Good implemented HAB HMS in 2004-2005 and has since purchased additional modules and extensions such as WaitlistCheck and RentPayment. MRI, a large, international real estate software company, acquired HAB in 2017. MRI also acquired many of HAB's competitors and set to work on an MRI public and affordable housing product. After the acquisition, MRI pulled development and support resources from HAB products to focus on the development of their new MRI PHA platform. We have known since 2018 that HAB HMS was a "dead" product, although MRI assured us that it will be supported and maintained for the near future. No end-of-life date has been set for HAB HMS at this time. But it is obvious that the product is only being maintained at a minimal level; support is poor, bugs are not being fixed, and only regulatory and compliance changes are being implemented.

The upgrade path proposed to Homes for Good from MRI was to stay on HAB HMS until their new MRI PHA product was finished. Then, all agencies would be migrated to the new platform. After many missed deadlines, the MRI PHA product is not finished and has no estimated date when it will be available. Homes for Good has been waiting over five years for MRI to produce the new

product, but we cannot wait any longer. Recent experiences implementing other MRI products (WaitlistCheck, RentPayment) have gone poorly due to lack of support from MRI.

The software migration conversation started at Homes for Good in 2018. A group was formed that would attend conferences, demo software, and keep track of the landscape. The agency demoed many PHA software platforms, including Emphasys, PHAWeb, and Yardi. We found that we were constrained by two factors: the use of the FileVision document management system which integrates with HAB and the agency's Moving to Work status. Most PHA software vendors do not support both FileVision and MTW, so our choices were limited.

The agency originally demoed Yardi Voyager in 2020 but Yardi sales staff told us that we could not implement Yardi and keep FileVision. That was a deal-breaker, so we wrote off Yardi. Through later discussions with FileVision staff and other PHAs, we discovered that we *could* keep FileVision and move to Yardi. FileVision has an integration with Yardi that works exactly the same as our current HAB HMS integration. We re-established contact with Yardi and have arrived at the proposal that is before you today.

In terms of the other available software, we demoed a web-based PHA software product called PHA Web, but they do not support MTW. We demoed Emphasys Software, which is a fairly robust software platform with excellent waitlist list features, but found that they do not currently integrate with FileVision. Yardi is currently the only web-based, SaaS (software-as-a-service) PHA software suite we are aware of that supports MTW and integrates with FileVision. This selection process has complied with out procurment policies. Our Legal Counsel has reviewed the proposed agreements and provided guidance on contracts.

C. Analysis

Passing this board order would set the agency on a path to implement Yardi Voyager by the end of 2023. While the cost is much higher per year than HAB HMS, the agency would benefit in a number of ways, listed below:

- Yardi Voyager provides public-facing web portals via its feature called Rent Café. This would reduce, and possibly eliminate, the need for many paper forms. Right now, the agency prints, mails, scans, and files thousands of pages of paper forms each month. We do this because we do not have a tool for electronically sending and accepting paperwork. Rent Café would provide a way for us to do this. It would also provide a new way of communicating with residents and participants; they could login to the portal to review inspections, update their contact information, etc. This functionality would eliminate many walk-in visits to the Olive and phone calls, freeing up agency staff to work on other tasks.
- Financial functions overall would improve significantly due to better integrations with external services (ex. check scanning). The agency would also benefit from being able to re-setup the financial part of the PHA software, making sure that it aligns with updated processes and procedures in finance. Our proposal also includes a feature called Procure to Pay which would streamline accounts payable and vendor paperwork. The agency should work with a Yardi third-party consultant throughout the implementation process with a focus on finance.
- From an IT perspective, web-based (SaaS) software would eliminate the need for some parts of our remote access and on-premises infrastructure that is currently needed to support HAB HMS. Yardi Voyager is web-based and works on any device. HAB HMS only works on Windows computers and runs on agency-maintained hardware, which requires constant maintenance and attention from IT. It would also improve resiliency since a network outage or other event

in the Eugene area would not impact the availability of Yardi Voyager since it is cloud-hosted. Since many critical business processes rely on the PHA software to be available, this would be a big improvement.

Homes for Good currently pays $28,613 per year for HAB HMS, WaitlistCheck, RentPayment, and approximately $23,160 for resident screening (background checks). The proposal from Yardi totals $188,369.25 per year for a five-year contract, with an additional $52,068.40 in one-time implementation fees due in the first year. It is likely that we will need to renew HAB HMS support and maintenance in 2024 if the Yardi implementation takes longer than expected. The proposal from Yardi uses GSA pricing when noted, meaning that pricing is fixed for the next five years. We were able to also negotiate the terms of the payment with 25% of the first-year total being due upon contract execution and the balance of the payment due up to 180 days which takes our timeline to our new fiscal year. The expenses related to implementing and operating the Yardi software were not included in the FY23 organizational budget approved by the Homes for Good Board. The expense related to implementing and operating the Yardi software during FY23 will be allocated across all of the operating divisions. The specific allocation methodology hasn't been decided upon yet, however, it will be based on how many FTE in an operating division will be utilizing Yardi functionality and also this methodology will take into account how much a specific staff member uses Yardi functionality.

The GSA Schedule, also known as Federal Supply Schedule, and Multiple Award Schedule (MAS), is a long-term governmentwide contract with commercial companies that provide access to millions of commercial products and services at fair and reasonable prices to the government. Yardi is an approved software vendor through the General Services Administration Schedule Contract 70, contract number GS-35F-0731P.

Pricing Proposal	Qty.	Price Concession		Net	Total
Annual Fees					
Yardi Voyager PHA – GSA Includes property and resident management; compliance; accounting; reporting; hosting; and Yardi Maintenance, Maintenance Mobile, Inspection, Fixed Assets, Inventory Control, and Job Cost & Grant Management.	4,468 units	$16.72		$16.72	$74,704.96
Yardi Voyager Affordable Housing – GSA	251 units	$3.67		$3.67	$921.17
Yardi Inspection Mobile – GSA	4,468 units	$1.67		$1.67	$7,461.56
Yardi Budgeting & Forecasting – GSA	4,468 units	$3.67		$3.67	$16,397.56
Yardi Voyager Legal	4,468 units	$5	($5)	$0	$0
Yardi Procure to Pay Includes Yardi PayScan (invoice processing), Yardi Marketplace (eProcurement), and VendorCafe (vendor management portal).	846 units	$10		$10.00	$8,460.00
RentCafe PHA • Online applications, certifications, and portals for applicants, residents, and landlords for 50058 programs • Online applications, certifications, and resident portals for affordable housing programs and market-rate properties	4,468 units	$24	($6)	$18.00	$80,424.00
Total Annual Fees					**$188,369.25**

D. Furtherance of the Strategic Equity Plan

Migrating to Yardi Voyager would improve customer service and staff efficiency at Homes for Good. The customer-facing portals would allow self-service options that we cannot offer with our current software solution. Improved efficiencies would save money and allow staff to focus on work other than manual data entry. This ties in with both the goal of listening to our communities and centering the program participant experience for additional self-service features regarding their relationship with Homes for Good. This also connects to the goal to Tell the Human story in our SEP, as better data and information will be available in the new system to help us identify disparities and address them. New software also adds to our effort around resiliency and reduction of carbon footprint, minimizing the amount of paper mail with the option of resident portals.

E. Alternatives & Other Options

Homes for Good has surveyed the PHA software landscape and due to the Moving to Work and FileVision integration requirements, our alternative options are below:

- Homes for Good could keep using HAB HMS until MRI's new PHA software platform is finished. The ETA for this product is unknown at the time. The cost could be more or less than Yardi Voyager. As stated above, HAB HMS is a "dead" product with little support and no new feature development. We would still rely heavily on paper forms and manual data entry and our financial reporting would, frankly, not be able to keep up with the demands and expectations of agency Leadership and the Board.
- The agency could implement Emphasys Software and eliminate the FileVision document management system. This would be a huge step backwards in functionality for the Rent Assistance department which also uses FileVision for task tracking. They would need to implement a project management system to replace FileVision. Emphasys's document management system was also deemed lacking compared to FileVision, so we would not gain any functionality or efficiencies in document flow with Emphasys.

F. Timing & Implementation

The implementation timeline is mostly dependent on Yardi at this time. Based on feedback from other PHA's that are implementing Yardi, it is likely that if this order is passed at the end of March 2023, we would begin implementation in May or June 2023 with a timeline of 7 to 8 months. It is likely that the timeline will exceed 8 months, so a realistic target date of completing implementation is Spring 2024.

G. Recommendation

It is recommended that the Board of Commissioners approve the recommendation to enter into a contract with Yardi Systems, Inc.

H. Follow Up

No follow up is needed at this time.

I. Attachments
1. Yardi PHA Suite Proposal (finalized Yardi proposal including price adjustments and a one-time concession of $50k)

ENERGIZED FOR TOMORROW

Yardi PHA Suite Proposal

March 13, 2023

YARDI | ENERGIZED FOR TOMORROW

Yardi Systems, Inc. 430 South Fairview Avenue, Santa Barbara, California 93117
+1 (800) 866-1144 | sales@Yardi.com | Yardi.com

Table of Contents

Proposed Products

Empower your team with a single, connected solution that delivers everything you need to work smarter and serve program participants better from front office to back office. Consolidate your operations on Yardi Voyager, then expand the platform with tools and services from our seamless product suite for PHAs. Products for online applications and recertifications, compliance workflows, applicant screening, payments, utility billing and management, grant management, budgeting, construction, online purchasing, and paperless invoice processing are all built seamlessly into Yardi Voyager.

1.   Proposed Products

Yardi Voyager PHA

Yardi Voyager PHA is the industry's only single-stack, web-based, mobile platform. Accounting, property management, and analytics for Public Housing, Housing Choice Vouchers, RAD conversions, and affordable housing are seamlessly built into one intuitive system.
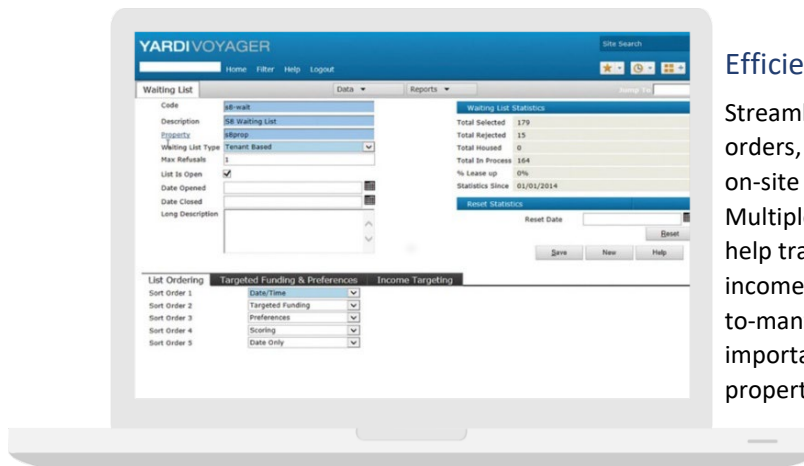
Efficient Unit & Voucher Management

Streamlined workflows help manage work orders, process purchase orders, and oversee on-site inspections with detailed reporting. Multiple types of waiting lists are available to help track all necessary data for HUD's income targeting requirements. Custom one-to-many tables are configurable to track every important detail necessary to meet your local property management requirements.

Integrated Case Management

Employment training courses, counseling, and other case management services are recorded in the core system and linked with participant and property management data.

Waiting List Management

Configurable intake processes help your staff record all applicant information. Yardi Voyager supports multiple types of waiting lists, and you can place applicants on several lists at once. The software tracks all necessary data and produces all reports to ensure compliance with HUD's income targeting requirements.
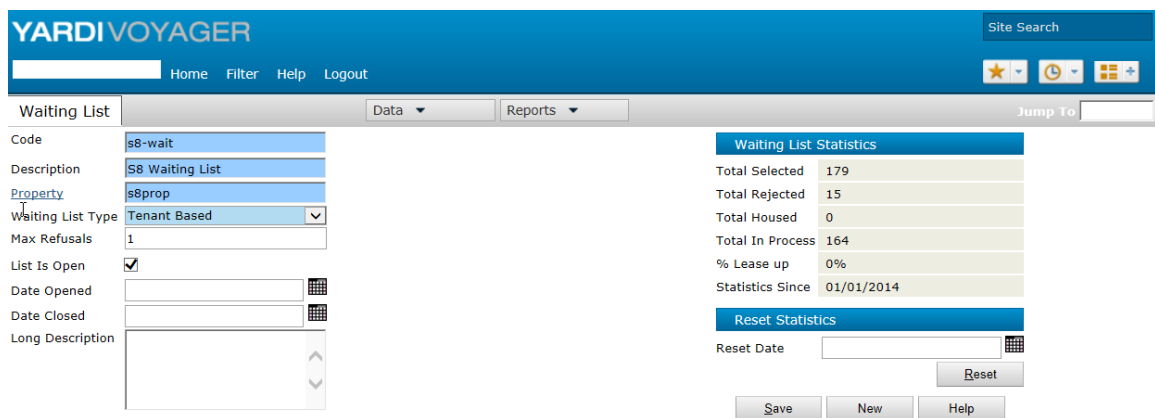
End-to-End Participant & Landlord Management

Yardi Voyager tracks interactions with participants and owners. Staff can add all documentation to create centralized prospect records, housing applications, eligibility approvals, move-out records, and more.

Comprehensive, Real-Time Reporting

Yardi Voyager produces dynamic, real-time reports to meet your HUD requirements, including:

- FDS (Financial Data Schedule)
- PHAS (Public Housing Assessment)
- VMS (Voucher Management System)
- SEMAP (Section 8 Management Assessment Program)

Reporting and audit trails give you insight into every aspect of your organization. Specialized dashboards and analytics show real-time operational, financial, and compliance information for core PHA processes and add-on services such as ScreeningWorks Pro and Yardi Utility Billing.

Key Management Indicators (KMI)

Program type : All Relevant Programs
Effective Dates Included : 5/1/2013 through 8/31/2014

Property: s8 VO Voucher Property

Families Reported

Families Reported

50058s Received (#)	End Of Participation (#)	Portability Move-Outs (#) (Vouchers Only)
78	4	18

Distribution by Families Reported   ** Some families may be included in multiple categories **

New Admissions (%)	Annual Reexams (%)	Flat Rent Annual Updates (%) (Public Housing Only)	Interim Reexaminations (%)	Annual Reexamination Searching (%) (Vouchers Only)	Portability Move-Ins (%) (Vouchers only)	Other Change Of Unit (%)
28	28	0	34	0	4	3

Historical Adjustments (%)
4
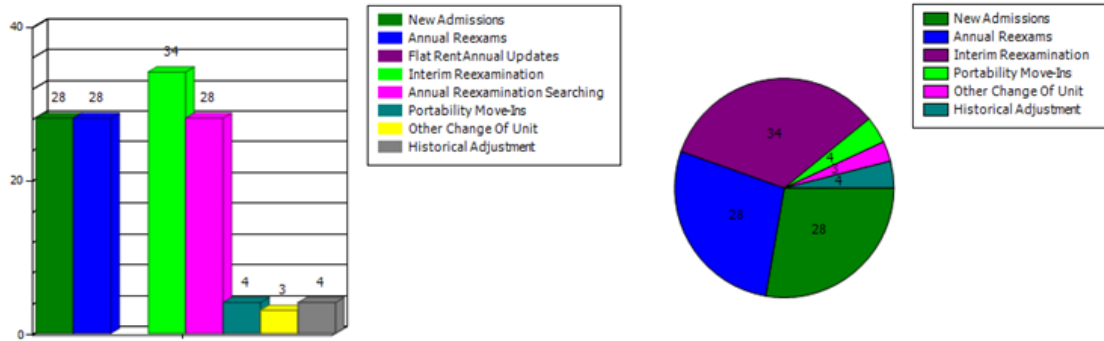
Income Targeting

The software tracks and reports on statistical income target data and status per HUD requirements.

Compliance & Administrative Management

PHAs face significant compliance and administrative responsibilities. Yardi Voyager provides all the tools you need to track required data for Public Housing, Housing Choice Vouchers, and the complete spectrum of federal, state, and local housing subsidy sources.

- **50058 Compliance.** Using the 50058 form and HUD guidelines for Public Housing and HCV, Yardi Voyager manages workflows, tracking, and reports to help you run your agency efficiently and maintain compliance. It enables MTCS/PIC transmission using rules from the technical reference guide to perform extensive, automatic pre-submission error checking, which greatly reduces 50058 PIC submission errors. Once you receive the transmission result file from PIC, our MTCS file reconciliation process offers detailed information to resolve any reported errors.
- **Resident Service Programs.** Yardi Voyager helps manage each phase of your resident service programs, including FSS, EID, and Community Service. You can use planned interview questionnaires to determine needs and goals, create assessments, generate action plans, and report progress on the 50058.

Administrative Management

Yardi Voyager helps you administer Public Housing, Housing Choice Vouchers, and RAD conversions.

- **Unit Rent Reasonableness Comparisons.** HUD requires PHAs to confirm that unit owners charge reasonable rents to HCV participants. Yardi Voyager performs rent reasonableness comparisons to help your agency meet these requirements.
- **Portability Tracking.** Portability allows families to use voucher assistance outside the original issuing PHA's jurisdiction. Yardi Voyager manages the workflow for the HUD 52665 Family Portability Information form.
- **Abatements & Tenant Holds.** You can hold all or specific payments for housing assistance, utility reimbursements, and FSS escrow credits. You can customize Yardi Voyager screens to help you manage these processes further.
- **Landlord Garnishments & Overpayments.** You can garnish the property owner for a portion or the entire HAP. Landlord overpayments are easily processed in Yardi Voyager.
- **Tenant Payment Agreements.** A tenant payment agreement (TPA) enables the resident to pay a debt to the PHA over time. Our TPA process reverses actual aged charges and adds new charges per the agreement terms. A resident can have multiple payment agreements.
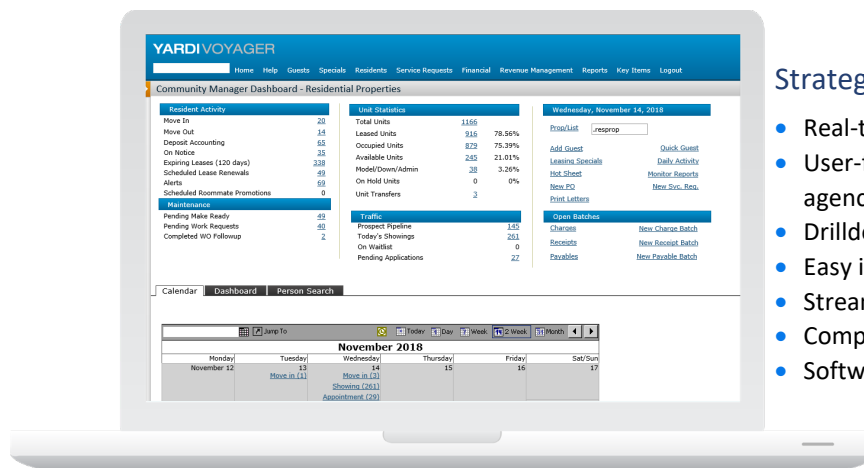
Strategic Benefits

- Real-time, mobile access through all major browsers
- The only comprehensive platform for accounting, compliance, and agency management from a sole-source vendor
- Full business solution with flexibility to add a suite of built-in Yardi products and services
- Streamlined 50058 compliance for Public Housing and HCV
- Hundreds of standard reports and custom analytics with drilldown to transaction level
- Integrated compliance and reports for HUD 50059, Tax Credit, HOME Funds, Rural Development Section 515, and RAD

Yardi Voyager Residential

Yardi Voyager is the industry's premier integrated platform for real estate management. This browser-based system combines accounting and property management information in one centralized database. Global access ensures faster processing and allows staff to run real-time reports from anywhere on demand. System-wide transparency allows site staff and supervisors to work efficiently, streamline workflows, and communicate easily across the agency.

Yardi Voyager helps you optimize control over management tasks and increase operational efficiency. Modeled on industry-standard practices, Yardi Voyager streamlines workflows with straightforward, intuitive processing of all participant information, from intake through move-out.

Strategic Benefits

- Real-time information on demand
- User-friendly dashboards specialized for agency staff roles
- Drilldown links to underlying data
- Easy intake management
- Streamlined operations
- Complete audit trail for transparency
- Software as a Service (SaaS) deployment

Financial Management

Our comprehensive accounting platform is configurable to unique agency policies, procedures, and reporting needs to make financial management processes more efficient. Yardi Voyager meets all HUD requirements for financial management, including asset management project (AMP) reporting.

- **Accounts Receivable.** Our comprehensive receivable functionality includes resident invoicing, letters, and statements; automatic and manual payment receipting; and configurable back rent calculation. These functions integrate with the general ledger, cash receipting, and accounts payable. You can enter data in real time, post unlimited recurring charges, and manage late fees with grace periods. Yardi Voyager manages complex rent rolls, overages, and multiple checking accounts. You can generate one-time and recurring invoices, customizable rent statements, and reconciliation letters for bulk print or emailing to residents.
- **Accounts Payable.** Yardi Voyager streamlines payable processing and reduces costs by converting paper invoices into electronic transactions, virtually eliminating paper and mailing costs. Automated workflows efficiently route invoices through approvals to vendor payment.
- **General Ledger.** The powerful general ledger allows your agency to use a single chart of accounts with configurable accounting segments. The system includes cash and accrual books, and you can configure multiple additional books. Users can drill down to base transactions from high-level reports, distribute expenses across properties or entities based on predefined allocation

percentages, and apply consolidated journal entries automatically to multiple entities based on percentages or statistical data.

Property Management

When an applicant first contacts your office, intake staff completes a guest card with contact information, unit preferences, expected move-in date, and household information. A wizard-like workflow processes applicants through move-in. Guest cards remain available for returning applicants.

Upon approval, the applicant becomes a resident, and the captured guest-card data automatically populates the new resident record. The resident stage of the workflow follows participants through the duration of their tenancy. From a single location, you can process move-ins, rent receipts, lease renewals, unit maintenance, notices, move-outs, and deposit accounting.

Analytic Reporting

Yardi Voyager includes a powerful set of analytic reports that create visibility into your operations. You can drill down from each report screen to the underlying data, down to the individual transaction. Filtering reports by properties, timeframes, and data attributes lets you zoom in quickly on the most relevant information. Our end-to-end system architecture creates insight into work orders, utility consumption, material inventory, and more, directly from the core Yardi Voyager user interface.

Key Features

- Calendars with alerts for tasks needing attention
- Comprehensive reporting
- Automated move-in and move-out accounting
- Streamlined unit-transfer management
- Lease renewal workflow
- EFT/ACH processing

Yardi Voyager Affordable Housing

Yardi Voyager Affordable Housing is an end-to-end platform for compliance, accounting, and property management for portfolios with multiple subsidy types and sources. Using one centralized database, this web-based system streamlines household qualifications and automates compliance. It includes all the tools you need to manage single- or multi-layered funding, including Low Income Housing Tax Credit, HUD Project-Based Section 50059, HOME Funds, and USDA/RHS Section 515 properties. Intuitive workflows shorten training times and raise productivity.

Compliance Features

- Section 42 Low Income Housing Tax Credit (LIHTC)
- All HUD project-based 50059 contracts
- HOME funds
- Bond tracking and property/unit set-asides
- RHS Section 515 (Rural Development)

Key Features

- Quick pre-qualifying and simple step-by-step qualifying
- Combined subsidies and single data entry for multiple layers of subsidy
- Historical income limits
- 50059 baseline conversion tool
- Wizard workflow for pre-certification of applicants based on project type
- Complete certification histories for residents
- Customizable recertification letters and notices
- Dashboard summary of compliance tasks and alerts for tasks due
- Flexible, unlimited waiting lists, including HUD-required reports
- Affordable and compliance analytics and lists of daily activities
- Rent repayment agreements
- Traffic monitoring
- Complete audit trail of receipts by unit or resident
- User group-specific views and permissions
- Extensive standard reporting with drilldown to underlying data
- Custom report writing tools
- Multiple styles of resident ledgers

Yardi Maintenance

Included with Yardi Voyager PHA, Yardi Maintenance gives you the tools you need to perform and track daily maintenance for all types of real estate. It includes work order and purchase order processing, expense limits, warranty tracking, and real-time reporting. Intuitive dashboards, workflows, calendars, and alerts speed up maintenance processes and help you deliver exceptional service for tenants. With the Yardi Maintenance Mobile app, technicians can access, create, and complete work orders from the field.

Smart System

Optimize control over management tasks, streamline workflows, and maximize efficiency with our online and mobile solutions. Global access to the centralized Yardi Voyager database enables you to run up-to-the-minute reports and helps technicians process work orders faster.

Mobile Maintenance

Yardi Maintenance Mobile conveniently lets technicians in the field create, update, and close work orders from a mobile device. Updates automatically appear in Yardi Voyager. Workers can quickly sort and select work orders based on various criteria. Technicians can edit the work order status and view problem descriptions and entry notes. Color bars indicate the priority of work orders based on your Yardi Voyager settings.

Streamlined Workflow

Yardi Maintenance processes work orders systematically from initial contact to completion. You can:

- Automatically calculate purchase and work orders
- Post payables and charges
- Efficiently assign and schedule work orders
- Track pending work requests, alerts, and exceptions

Yardi Construction & Grant Management

Included with Yardi Voyager PHA, Yardi Construction & Grant Management helps you manage all types of development, job costing, and receivables efficiently through all phases of construction. It streamlines operations and increases control over management tasks, so you can complete development projects faster and meet your budgets. You can easily track all job budgets, budget revisions, job bids, expenses, receipts, draws on construction loans, subcontracts, and more.

Automated Tracking, Updates, & Charge Creation

Yardi Construction & Grant Management automatically tracks actual costs and compares them to the budget. It updates the job cost and general ledger when a transaction is entered, helping you catch all charges related to job cost transactions immediately. To bill for a specific invoice or draw, you can automatically create charge amounts based on a user-defined budget and a percentage of selected categories.

Comprehensive Reporting

Yardi Construction & Grant Management reports on related change order budget amounts, amounts billed to date per category, and the draw budget as well as budget, revisions, and bid fields. In addition, every transaction is automatically checked for over-budget amounts.

Increased Flexibility

You can enter contracts and subcontracts for multiple jobs and properties. You can also update the job budget automatically when you enter contract amounts and changes.

Strategic Benefits

- Automatic over-budget checking
- Unlimited database for all job cost records
- Drilldown report access to underlying transactions for job cost summary data
- Subcontracts link to jobs and user-defined subcategories
- Ability to select exclusive job costing vendors
- More productivity and fewer manual processes

Yardi Fixed Assets

Included with Yardi Voyager PHA, Yardi Fixed Assets enables you to manage assets that require different depreciation methods directly in Yardi Voyager. You can track the full depreciation history as assets age and monitor fixed assets from purchase order through purchase, use, and final disposition. Linking new assets with purchase orders creates payable invoices and journal entries.

Strategic Benefits

- Multiple depreciation methods and conventions
- Asset creation from one or more payables and journal entries
- Full depreciation history in Yardi Voyager
- Comprehensive reporting with drilldown

Key Features

- Integrates purchase and work order functionality to generate an asset with a unique tracking number automatically
- Leverages user-defined status options to reserve, schedule for move, move, receive, or assign an asset to intermediate stages
- Tracks asset locations with full history, such as in service, in storage, on a truck, or a user-defined location
- Enables users to build assets from a collection of journal entries and payables (such as a software implementation project)
- Calculates depreciation in a variety of ways, including placing on hold (for example when selling a property) and performing catch-up depreciation
- Reconciles actual fixed assets periodically with the quantities showing in the system
- Automates asset dispositions and the resulting journals

Yardi Inventory Control

Included with Yardi Voyager PHA, Yardi Inventory Control is the ideal solution for managing inventory as it is distributed and transferred among multiple locations. You can follow inventory from purchase order issuance through transfer from warehouses to transport vehicles and properties. Yardi Inventory Control effortlessly tracks the financial impact of inventory movement, locations, and types of use. You can monitor the labor and materials used to complete work orders, quickly reconcile the physical count of on-hand inventory items, and automatically reorder inventory as needed. You can also update pricing based on amounts paid on purchase orders. Additionally, your staff can perform inventory control tasks using several common barcode scanners. The recorded data updates the Yardi Voyager database in real time, eliminating redundant data entry and helping warehouse staff work more efficiently.

Strategic Benefits

- Precise inventory control
- Tracking of financial impact of inventory movement
- Automatic reordering of supplies
- Comprehensive report package for better inventory management

Key Features

- Ties specific inventory locations to properties (e.g., property staff can only access inventory at the local warehouse)
- Groups user-defined item types into user-defined categories
- Tracks entire inventory location history and movement with drilldown to individual POs
- Records distribution requests for approval
- Shows all inventory in its source location(s)
- Transfers individual items from various source locations to multiple destinations
- Records checking in and out of materials used for maintenance duties; automatically adjusts inventory counts and work orders
- Generates purchase orders automatically when quantities on hand plus quantities on order fall below the specified reorder level
- Displays all available vendors and corresponding prices for selection or optionally selects lowest prices automatically
- Reconciles actual physical inventory entered by hand or by barcode scanner with the quantities in the system automatically

Yardi Inspection

Included with Yardi Voyager PHA, Yardi Inspection is a flexible tool for scheduling and managing all types of inspections at market-rate and subsidized properties. You can easily create custom inspection templates to suit unique business needs, assign inspections based on user-defined criteria, and view detailed reports on inspection history and more.
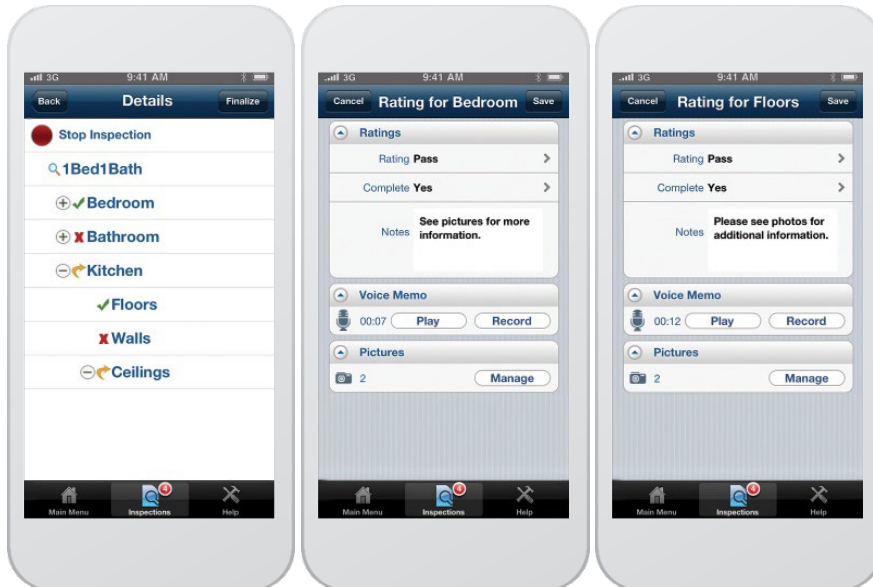
Mobile Inspections (Optional Add-On)

The optional Yardi Inspection Mobile augments Yardi Inspection with the ability to access and enter inspection data and capture signatures using a smartphone or tablet. Assigned inspections appear on the inspector's device instantly, and completed results update the Yardi Voyager record automatically. Yardi Inspection Mobile can operate in areas without a cellular or wireless connection and synchronize data once the connection is reestablished. The app supports Android, iPhone, and iPad.

Key Features

- Tracks inspector, inspection type, status, due date, completion time, resident/tenant, and more
- Supports inspection types such as move-in, move-out, annual inspections, due diligence, safety checks, regulatory reviews, and more
- Flexible inspection templates with multiple levels of granularity, custom ratings (e.g., pass/fail, clean/requires cleaning/replace), areas (e.g., kitchen, bedroom, bath, exterior), and elements (e.g., plumbing, refrigerator, windows, business permits), including built-in HQS and UPCS inspection templates
- Enforces custom business rules (e.g., fail unit or room inspection if a critical item does not pass)
- Supports photo and voice memo attachments for line items
- Records cost quotes and work orders created directly from the inspection screen
- Generates notification letters on inspection results and follow-up scheduling
- Reports on inspections by unit, tenant, inspector, or unit type
- Supports UPCS-V inspections

Yardi Budgeting & Forecasting

Yardi Budgeting & Forecasting supports detailed analyses and comparisons of future income and expenses for your properties. It streamlines budget preparation and provides unmatched flexibility by letting you create custom models and formulas, so you can base your budget forecasts on criteria specific to your needs. Yardi Budgeting & Forecasting helps you to work more efficiently by increasing the accuracy of your portfolio budget projections.

Yardi Budgeting & Forecasting accurately projects revenue and expenses using data from actual leases. Budget worksheets make it easy to analyze and compare assumptions and scenarios. You can project future revenue from rent increases, recoveries, and lease rollover assumptions. In addition, you can apply market leasing assumptions and rent or charge escalations to your forecasts, import budget amounts from general ledger accounts or existing budgets, and clarify budget amounts and variances with comprehensive narrative-and-detail reporting.

Strategic Benefits

- Accurate revenue projections based on defined leases and rollover assumptions
- Unlimited budget revisions with ability to copy and combine budgets
- Collaborative budget operations
- Advanced integrated security features

Key Features

- Applies custom formulas, budget assumptions, and market leasing assumptions to create and run advanced budget models for various financial forecasts and projections
- Exports budget data to Microsoft Excel
- Documents comments, variances, and action items using budget details and narratives
- Uses advanced variance analysis to identify amounts that exceed specified budgeting thresholds
- Enables zero- and task-based budgeting
- Generates a wide variety of budget-to-actual comparative reports
- Controls general ledger account access to budget worksheets
- Includes advanced budget security functions to lock worksheets and hide accounts from unauthorized users

Yardi Procure to Pay

Yardi Procure to Pay is a centralized, end-to-end platform for accounts payable, procurement, and vendor management built into Yardi Voyager. It includes seamless purchase order creation, real-time budget checking, dynamic approval workflows, electronic invoice processing and payment, and secure vendor payments. Powerful analytics support continuous process improvement.

Eliminate Paper

With Yardi PayScan, scanned paper invoices are instantly matched with purchase orders and sent through customizable approval workflows that match your approval procedures. Lines are compared against price, SKU, and quantity to ensure the resulting payable maps correctly to the purchase order. Your vendors, customers, banks, and employees handle less paper, which reduces the associated costs and labor. Electronic invoices can be approved from anywhere based on user security settings, including from your mobile device with the Yardi Procure to Pay app.
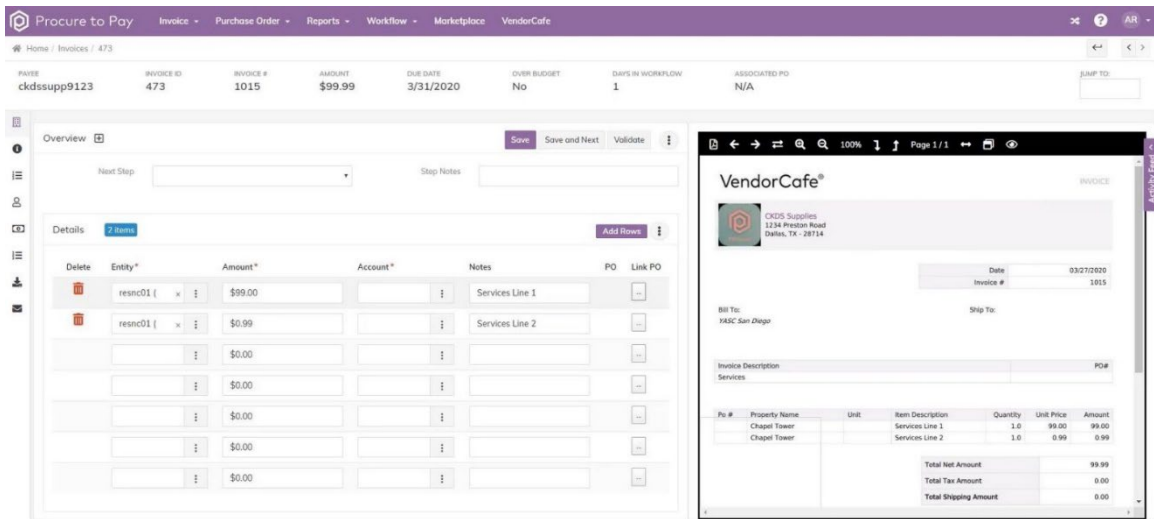

Control Spend

Yardi Marketplace is a one-stop platform for sourcing, purchasing, invoicing, and payment that optimizes spend management. A comprehensive, competitively priced online catalog streamlines procurement processes with more than a million products and in-store purchase programs with partners such as The Home Depot and Grainger. You can easily define and import catalogs, access favorite product lists, purchase items, and automatically generate purchase orders. Approving and standardizing pricing across your portfolio maximizes your control, and real-time budget checks eliminate overspending.

Manage Vendors

Included with Yardi Procure to Pay and integrated with Yardi Voyager, VendorCafe is an easy-to-use vendor portal that dramatically reduces paper invoices and streamlines communication with product and service vendors. By centralizing vendor information in a single system of record, you gain a 360-degree view of your vendors and property associations. You can define your onboarding process to assess risk proactively and ensure only approved vendors are added to your accounting system. Vendors can easily

register and upload insurance certificates and other required information. Approved vendors can upload invoices and monitor their status online, which reduces follow-up emails and calls.
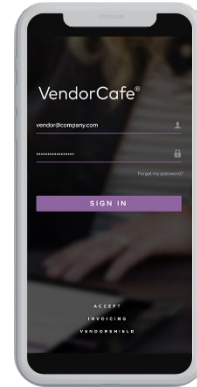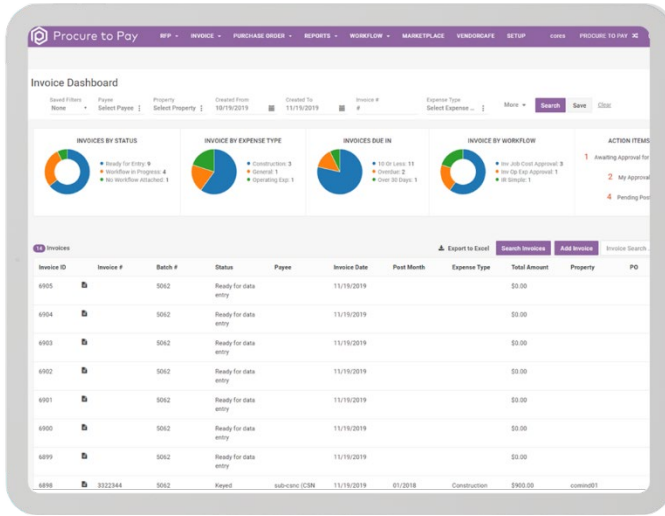
Vendor Compliance

VendorShield reduces reputational risk and frees up valuable resources by automating vendor screening. Reliable, real-time vendor compliance monitoring promotes a supportive environment for your residents and tenants. You create custom rules to ensure your suppliers meet your requirements for insurance coverage, professional licenses, background checks and more. Our automated process searches government watch lists as well as national and local business verification and credentialing data, and our experienced compliance team collects and audits insurance data. Once approved, vendors are ready to work and submit invoices; regular auditing ensures ongoing credential and insurance compliance.

Full-Service Convenience

You can further reduce costs and increase efficiency with Yardi PayScan Full Service. We open a dedicated, secure PO box and email addresses for your organization. Your vendors submit invoices on paper or by email, and we scan them and enter the data for you. The invoices appear in Yardi Voyager as invoice registers, ready for you to review, approve, and process as payables.

Bill Pay

Yardi Bill Pay makes it easy to pay your vendors. We pull approved payments from your Yardi Voyager database daily, transmit files to your banking network, and confirm payment. Yardi Bill Pay works seamlessly with your approval workflows, so you retain full control and oversight. Payment options include ACH, check, credit card, and virtual credit card. With our virtual card, you pay no transaction fees and receive a rebate on every transaction, while your vendors benefit from faster, frictionless payments.

RentCafe PHA

PHAs can simplify and expedite housing applications with RentCafe PHA, a compliance and eligibility portal that replaces paper forms and applications. It includes convenient features such as family profile management, data review, and newsletters. Seamless integration with Yardi Voyager PHA eliminates the need to re-enter client information once the applicant becomes a resident.
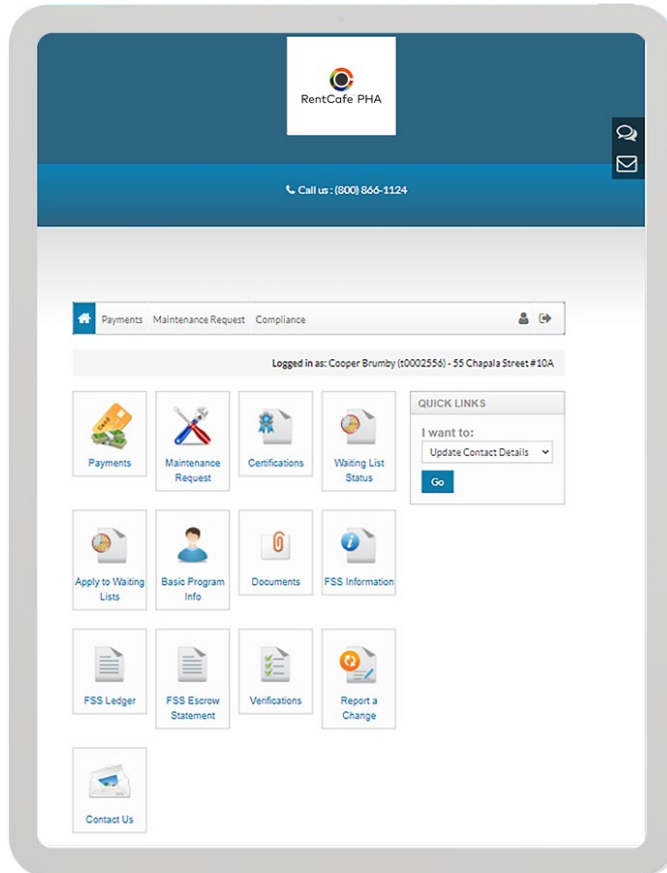
Key Features

- Compliance tracking for HUD 50058 programs
- Online applications for multiple public housing waiting lists integrated with Yardi Voyager
- Self-service access 24/7, reducing phone calls from applicants, residents, and landlords
- Online payments, maintenance requests, annual rent reviews, and recertifications
- HCV landlord/owner access to reduce time-consuming phone calls about payments and other account information
- Customizable layouts, links, and pictures

Online Application & Applicant Portal

RentCafe PHA can replace paper-based applications with web-based workflows that can be configured to your agency's requirements. Built-in system checks ensure applicants complete all required steps in the process, so your staff spends less time following up on incomplete applications and can screen applicants for eligibility more quickly.

Applicants can update their contact information, download PHA forms, and review their waiting list position, family details, and assets. They can complete and sign their intake certifications online. Electronic applications also eliminate costly and potentially unsecured storage of physical files.

Save My Spot

The unique Save My Spot feature lets your staff spend fewer hours maintaining waiting lists by enabling applicants and residents to remove themselves from the lists during a purge. This keeps your waiting lists up to date and eliminates the need to print, mail, and process forms for waitlisted participants manually.

Applicants receive automated notifications and simply click a link to keep their spot or be removed from the waiting lists.

Resident/Participant Portal

With the RentCafe PHA resident portal, participants can update their contact information, submit service requests, check the status of PHA verifications, and download PHA forms. They can also review inspections, family details, and FSS. With RentCafe PHA online certifications, participants can complete their recertifications, upload required documentation, and sign documents electronically.

Online Certifications

HUD's 2015 Administrative Fee Study (huduser.gov/portal/hcvfeestudy.html) reports that housing authorities spend an average of $226 per annual household recertification for Housing Choice Vouchers, including staff time, materials, postage, etc. Online certifications via RentCafe PHA offer your applicants and participants a self-service tool for completing their intake certification, recertification, and interim workflows. They can upload documents via smartphones, tablets, or computers and sign electronically. Your applicants and participants gain more flexibility, and your agency saves on materials and staff effort for certification interviews and document handling.
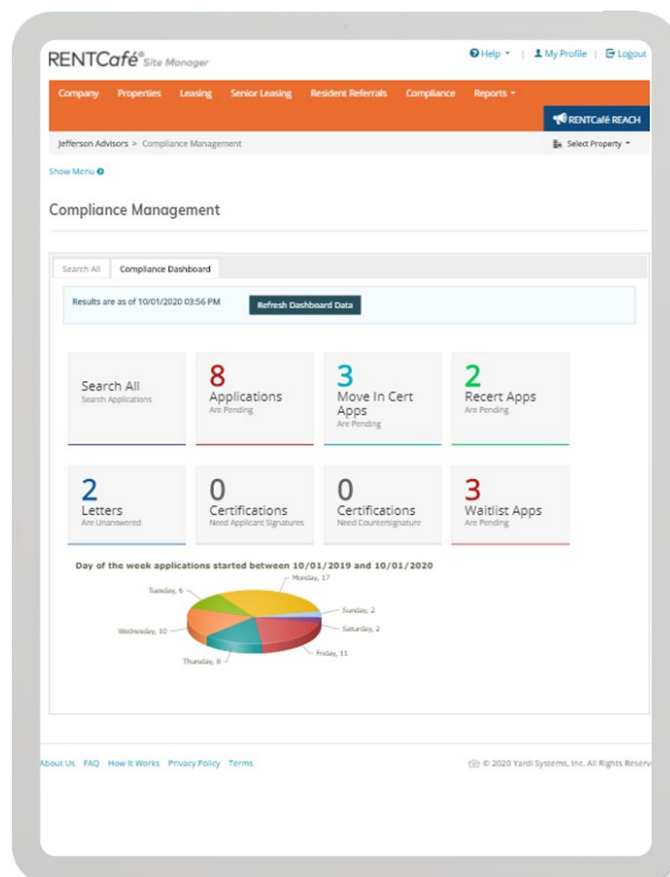
Landlord Portal

The RentCafe PHA landlord portal supports your landlord recruitment and retention efforts by offering 24-hour access comparable to private management companies. Landlords and owners can quickly access their profile information, caseworker, and ledgers. They can review scheduled and completed inspections, update unit details, and set up direct payments. Electronic attachments, forms, newsletters, and messages help you stay connected with landlords and keep information current.

Secure, Convenient Access

Whether participants access RentCafe PHA at a kiosk in your office or from their home, their personal information is always protected. Comprehensive security includes encryption of all data transmittals.

Affordable Housing

RentCafe Affordable Housing is an online portal for applicants and residents that replaces paper-based application and compliance processes. Standard workflows verify compliance with state and federal programs, including HUD-50059, Section 42 Tax Credit, HOME, and Rural Development, as well as properties funded with combinations of these programs. Simple, self-service data entry protects you from fair housing claims and reduces the need for staff coaching.

Strategic Benefits

- Enhances the customer experience
- Reduces costs for lead generation, paper handling, and storage as well as time spent on interviews and data entry
- Increases accuracy and completeness of documents
- Frees up site staff to assist residents and applicants
- Seamlessly built into your Yardi platform

- **Streamline the Application Process.** Innovative features such as language translation and error checking improve the customer experience. RentCafe Affordable Housing ensures that applicants answer each question and highlights potential errors before submission, so your team spends less time conducting interviews and following up on incomplete applications. Easy-to-navigate dashboards help you track the status of applications through the approval workflow. Standardized, documented online applications add protection from fair housing claims.
- **Market your Properties.** Our marketing sites showcase your communities with appealing, user-friendly designs, large photo displays, mouse-over floor plans, videos, blogs, and user ratings and reviews. Mobile-friendly design improves the customer experience.
- **Expand Resident Services.** RentCafe resident portals increase retention by offering services your residents expect. Available as a responsive website or a mobile app, the resident portal allows renters to update their profiles, view balances, make payments, and submit maintenance requests with photos and voice memos easily and securely. Online announcements and calendar events keep residents connected with your community.

Yardi Payment Processing

Yardi Payment Processing increases resident satisfaction and office efficiency. By managing receivables and payables in one system, you streamline rent collection and reduce processing errors and costs. Flexible payment options make it easier for your staff to collect rent and fees and eliminate bank runs.

Online Payments

Residents can use your RentCafe PHA portal 24/7 to check their balance and pay rent from a checking account. Recurring payments offer convenient automatic scheduling. Secure transactions automatically update your Yardi Voyager ledger. ACH payments are sent to your bank the next day.

Walk-in Payment System (WIPS)

The Walk-in Payment System allows residents to pay rent in cash at thousands of convenient retail locations. Your site teams gain efficiency and reduce money order fraud. Payment confirmation appears in Yardi Voyager the next day; funds are available within three business days.

Convert Checks to Electronic Payments

By creating electronic receivables based on bulk-scanned checks and money orders, Yardi CHECKscan reduces NSF risk and eliminates trips to the bank, lost checks, and keying errors. You simply confirm payment matches, and check images are automatically linked to charges in Yardi Voyager. The system creates receipts and applies your payment priority rules. It converts money orders and checks to X9 deposit files and sends them to your bank via EFT the next day, which makes funds available faster.
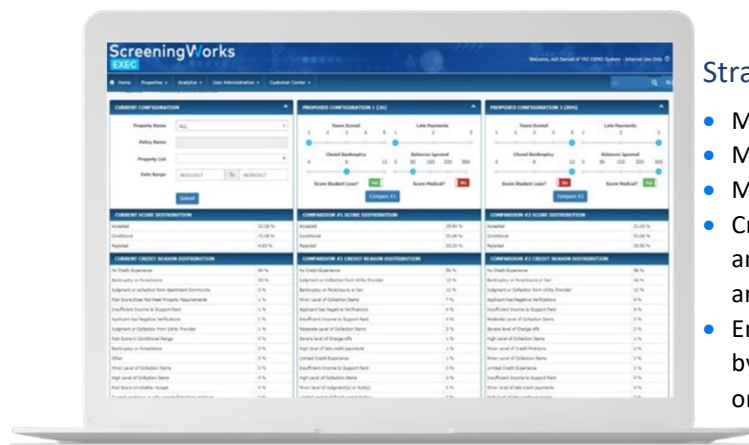
Key Benefits

- Rapid funds availability via electronic deposits
- 24/7 online payments and ledger access via RentCafe portals
- Debit, credit card, and ACH payments with recurring ACH option
- Automatic charge matching and payment priority rules from Yardi Voyager
- No data transfer or synchronization needed

ScreeningWorks Pro

ScreeningWorks Pro software is a proven online screening tool that helps property managers make smart rental decisions using comprehensive reports. Selecting the best residents for each property reduces risk from collections, evictions, and legal action. Using the most reliable data available, ScreeningWorks Pro eliminates guesswork and provides automated recommendations that minimize risk. The system is customizable for all multifamily property types, including market-rate, subsidized, and student housing. Our service organization is a wholly owned Yardi subsidiary with three decades of screening experience.

The end-to-end ScreeningWorks Pro process offers rental staff clear, consistent direction that supports your business rules. Automating screening workflows increases control and cost savings and enables staff to work more efficiently. Decision criteria are tailored for each property in your portfolio, so applicants are always screened uniformly and per your objectives.

Strategic Benefits

- Minimize risk
- Maximize revenue
- Maintain compliant and safe communities
- Create transparency into applicant traffic and property performance via built-in analytics
- Enhance staff efficiency and record keeping by launching screenings from Yardi Voyager or RentCafe

Key Features

- Highly customizable rules allow you to automate consistent decisions (accept, conditionally accept, reject) and improve compliance
- Tiered screening option enables cost and time savings (e.g., criminal screening only takes place after applicants pass the credit screening)
- Experienced consultants help you fine-tune decision criteria to meet your goals
- Comprehensive data sources include credit reports from the major bureaus as well as terrorist, drug trafficker, sex offender, and Social Security fraud screening
- International credit reports improve risk management for immigrant prospects
- Advanced criminal screening uses the most accurate national, state, and county databases and frees site staff from deciphering and interpreting complex lists of criminal records
- Landlord and tenant civil court records provide additional protection
- Rental payment history records powered by RentBureau show month-by-month payment history and timely collections activity
- Applicants can automatically screen themselves during the online leasing workflow, eliminating work for leasing staff
- Strategic analytics create executive insight into portfolio-wide traffic and screening activity to support smart business decisions

The Work Number Social Service Verification

Social Service Verification (SSV) mitigates the risks of relying on stated income and prevents the costs of disqualifying applicants and evicting unqualified residents. It gives you secure, convenient access to the financial data you need for compliant income certifications.

Powered by The Work Number, the nation's largest central source of real-time employment and income information, SSV is ideal for affordable housing providers and PHAs of all sizes. Its dataset includes 100+ million active payroll records from 600 million employers of all sizes. All payroll records come directly from employers each pay period. This breadth of payroll data helps you verify applicants' current income and employment instantly, document that residents meet program standards, and uncover rent miscalculations. Authorized users run SSV directly from their dashboard and receive screening results, including detailed income data, in minutes. Integration with Yardi Voyager eliminates the need to access a separate system to screen applicants for certification and residents for annual recertification.

ScreeningWorks PRO

Accurately enrolling applicants in the right program is critical to administering public assistance today. The Work Number® offers current employment and income verifications with real-time delivery and can also help you find unreported income.

Test X Employee XXXX-XX-5091
Information Current As Of 10-20-2021

Social Services Verification

Order Information
Verification Type: Social Services Verification
Reference Number: 55850205
Tracking Number: 100371107747

Employee
Address 1:	126 MAIN ST.
Address 2:	APARTMENT 3A
City:	ST. LOUIS
State:	MO
Zip:	63101-1020
Date of Birth:	1971-06-03

Employment
Employer:	Enterprise USA(90001)
Headquarters Address:	
Address 1:	316 11th Street
City:	De Witt
State:	IA
Zip:	52742
Work Location(Job Site):	847 1st Street Suite 500 St. Louis, MO 63146
Employment Status:	Active
Most Recent Start Date:	2017-01-04
Original Hire Date:	2017-01-04
Reason for Termination:	
Total Time With Employer:	57 months
Job Title:	DEMO EMPLOYEE

Benefits
Medical Insurance Available:	Y
Employee Eligible:	Y
Employee Enrolled:	Y
Next Open Enrollment Date:	2022-03-30
Coverage Start Date:	2008-01-01

Dependents:
JOHN W SMITH   XXXX-XX-6789 2005-07-15
Participation in COBRA: N

Dental Insurance
Dental Insurance Available:	Y
Employee Eligible:	Y
Employee Enrolled:	Y
Carrier Name:	DENTAL INSURANCE
Carrier Phone Number:	3148887000
Policy Number:	987654321

Employee Eligible:	Y
Employee Enrolled:	Y
Carrier Name:	VISION INSURANCE
Carrier Phone Number:	3149991234
Policy Number:	999123456

Income and Deductions
Rate of Pay:	26.6
Employee Pay Frequency:	Biweekly
Avg. Hrs. Worked/Pay Period:	80
Pay Cycle:	Biweekly

Income Summary
	Base	Overtime	Commission	Bonus	Other	Total
2021	$41,496.00	$200.00	$.00	$400.00	$50.00	$42,146.00
2020	$51,072.00	$200.00	$.00	$400.00	$50.00	$51,722.00
2019	$54,264.00	$200.00	$.00	$400.00	$50.00	$54,914.00

Pay Period Detail
Income:

HUD recognizes The Work Number's database as a Level 5 Up-Front Income Verification (UIV) source, which is the highest level of verification for wage and salary information. Comparing paycheck information with actual income received throughout the year helps you identify unreported or misstated income. Identifying income trends and anomalies helps ensure income certifications accurately portray a household's financial situation.

Income Verification

ScreeningWorks Pro offers property managers instant income and employment verification. Using a combination of automation and AI, this service quickly validates employment history, banking information, and paystubs to deliver one of the highest completion rates in the industry.

Verifying income as part of your screening workflow benefits applicants and property managers alike, supports effective due diligence, and minimizes risk. You gain insight beyond the income stated on applications and free up your staff from validating company information manually and calling to verify employment. Increased speed and efficiency improve your customer experience, so you can approve more qualified applicants more quickly.

The Work Number from Equifax is the nation's largest central source of real-time employment and income information. It houses over 350 million payroll records from thousands of employers nationwide, including 82% of Fortune 500 companies and most civilian federal government employers. Data from employers is updated every pay period, so you receive the most current information.

NOVA adds two powerful verification options. If The Work Number does not find a record for a prospect, ScreeningWorks Pro can send an automatic email to the prospect with options to grant bank access for deposit records or upload a pay stub to verify income. Adding this step helps you reach a wider prospect audience and increases typical income verification rates to 90%.

Property Screening Result

APPLICATION RESULT: ACCEPT APPLICANT (NORMAL DEPOSIT)   ✔ Income Verified

Print   Generate Letters   Refresh

Applicant Information

NAME: Emelia Gutierrez
SSN: No SSN
DOB: 06/30/1960
EMAIL: amandabonnellyardi@gmail.com
CURRENT ADDRESS: 365 Arabian CR, Pensacola, FL 32506

Individual Result

Accept Applicant (Normal Deposit)

Additional Information

Items to Review

- CHECKPOINT MESSAGE in Bureau Report
- Income Verification Completed

Additional Applicant Information

Residence History
This applicant has rented or owned.
TIME AT CURRENT ADDRESS: 12 years 6 months

Employment/Income
PROPOSED RENT: $2000
TIME AT CURRENT JOB: 12 years 6 months

Verified Income
INCOME: $3777 per month
RENT/INCOME: 9 %

Additional Income:
- Additional Applicant: $7579 per month

Stated Income
PRIMARY INCOME: $15000 per month
RENT/INCOME: 4 %

Additional Income:
- Additional Applicant: $10000 per month

Overview   Credit   Criminal   Civil Court   Rental   OFAC/SDN   Income Verification

Service	Request Date	Completed Date	Status
Credit Report	07/19/2022 3:47 PM	07/19/2022 3:47 PM	Complete
Criminal Search	07/19/2022 3:46 PM	07/19/2022 3:46 PM	Meets Property Requirements

Yardi SaaS Select

Yardi SaaS Select clients can control and modify key aspects of the system while benefiting from Yardi's site and server management and disaster recovery services. Clients have a dedicated installation of the core platform and can review software updates in their dedicated test environment. Yardi hosts the software in a shared network environment optimized for performance and security.

Yardi hosts the software in a shared network environment optimized for performance and security. Yardi SaaS Select accommodates a wide variety of client needs and is an excellent choice for Public Housing Authorities and government agencies.

Data Center Infrastructure

Yardi uses multiple proven, SSAE 18-audited facilities to ensure availability and security for your environments. Key data center features include:

- Security—24x7 monitoring; access restricted to authorized personnel
- Redundant power systems (UPS and generators)
- Redundant HVAC systems and automated monitoring of temperature and humidity
- Fire detection and suppression systems

Network Infrastructure & Architecture

Our network infrastructure accommodates your application demands and provides redundancy and high availability through multiple security layers. Key features include:

- Redundant network connectivity (multiple Internet providers)
- Load balancing capabilities
- Managed firewalls, routers, and intrusion detection systems
- Security incident management

Backup & Recovery Options

Each client's database is replicated in real time to a parallel database server with automatic failover capabilities. Incremental transactional backups support point-in-time database restores. Optional backup encryption is available. We make complete backups every night and place them on a secure FTP server, from which clients can authorize an internal user to download the backups. Backups are kept in a secure, off-site location whose security is reviewed annually.

Turnkey Real Estate Management

Yardi SaaS Select offers convenient, cost-effective hosting for the latest property and compliance management technology. Clients benefit from the power and performance of our secure data centers without having to establish and maintain the IT infrastructure, support services, and security necessary to keep their system operating at peak efficiency. This all-inclusive approach lets you focus your energy where it counts—on your business.

Implementation & Services

Yardi invests in a strong domestic service infrastructure to support you. We tailor our services to your needs to ensure that our products are best configured for your operating needs.

Implementation

Our established best practices and configuration standards simplify and speed up the implementation process. Our service options include data conversion, training, process analysis, project management, customization, third-party integration, and more. We offer standardized, scalable implementation support based on our proven methodology. Our staff works with you to establish goals, procedures, and timelines and guides you through the project. We are happy to present a service proposal for your needs. Yardi Cloud hosting supports quick rollouts because our data centers have preconfigured servers and networks in place to begin hosting your system.

Ongoing Support

We assign a support team dedicated to the PHA industry. An annual block of support hours via a toll-free hotline, email, and our support website during local business hours is included; occasional or ongoing extended support is available. Your support team informs you of product updates and coordinates issue resolution as needed. Our in-house hosting team offers 24/7 connectivity support via a dedicated hotline. Self-help resources include task-based online help, video tutorials, practical software manuals, and more.

Software Maintenance

To support the evolving needs of the housing industry, we offer regular software updates at no additional cost. Updates include client-driven, reliable new features, reports, and compliance with new HUD requirements.

User & Focus Groups

Client-run user groups offer peer support and networking opportunities; Yardi supports and participates in these groups if requested. Our clients and staff also meet in market-specific focus groups to identify and prioritize software development initiatives.

User Conferences

Offered as free online events or in person, the Yardi Advanced Solution Conferences (YASC) bring together clients and Yardi staff for industry updates, training, and development discussions. Our most recent global digital YASC attracted 15,000 participants over three days. Attendees completed 100,000 sessions in 300 classes, and our product specialists answered thousands of questions via live chat.

Price Proposal

The following pricing is valid for 90 days from the date of this proposal. Annual fees include software license fees, databases, administrator tools, software updates, application support, and hosting support. For non-GSA products, subsequent years' annual fees are subject to increase on the anniversary date of the software license agreement, based on the nationally published Consumer Price Index (CPI). One-time service fees include installation, implementation, project management, and training.

2.   Price Proposal

Pricing Proposal	Qty.	Price	Concession	Net	Total
Annual Fees					
Yardi Voyager PHA – GSA Includes property and resident management; compliance; accounting; reporting; hosting; and Yardi Maintenance, Maintenance Mobile, Inspection, Fixed Assets, Inventory Control, and Job Cost & Grant Management.	4,468 units	$16.72		$16.72	$74,704.96
Yardi Voyager Affordable Housing – GSA	251 units	$3.67		$3.67	$921.17
Yardi Inspection Mobile – GSA	4,468 units	$1.67		$1.67	$7,461.56
Yardi Budgeting & Forecasting – GSA	4,468 units	$3.67		$3.67	$16,397.56
Yardi Voyager Legal	4,468 units	$5	($5)	$0	$0
Yardi Procure to Pay Includes Yardi PayScan (invoice processing), Yardi Marketplace (eProcurement), and VendorCafe (vendor management portal).	846 units	$10		$10.00	$8,460.00
RentCafe PHA • Online applications, certifications, and portals for applicants, residents, and landlords for 50058 programs • Online applications, certifications, and resident portals for affordable housing programs and market-rate properties	4,468 units	$24	($6)	$18.00	$80,424.00
Total Annual Fees					**$188,369.25**
Transaction Fees					
Transaction-based fees are not included above and are billed monthly in arrears based on actuals.					
Yardi Payment Processing • Yardi CHECKscan: $0.40 per scanned check; billed to the agency • ACH payments: $0.50; charged to the resident or the agency • Debit and credit card payments as well as walk-in payment services are available upon request					
Yardi Procure to Pay: Full-Service Invoice Processing					$0.60 per invoice
One-Time Service Fees					
Implementation and Training – GSA	240 hours	$189.41		$189.41	$45,458.40
RentCafe PHA Phone Support – GSA	150 hours	$113.64		$113.64	$17,046.00
Additional Phone Support – GSA	100 hours	$113.64		$113.64	$11,364.00

Pricing Proposal	Qty.	Price Concession	Net	Total
Yardi Procure to Pay Implementation	Flat fee			$3,200.00
Data Conversion	2 properties	$12,500	$12,500	$25,000.00
One-Time Concession				($50,000.00)
Total One-Time Fees				**$52,068.40**
Total Year 1				**$240,437.65**

ScreeningWorks Pro

ScreeningWorks Pro transaction fees are billed monthly in arrears based on actuals.

Screening Component	Cost	Concession	Your Price
Credit Reports			
Credit Screening	$7	($2)	$5 per screening
• Includes full national credit bureau report			
• Expert scoring model designed for the multifamily industry			
• Option to include non-credit criteria such as rent/income ratio, residence history, and employment history in your customized scoring model			
• Clearly states reasons for applicant decision and flags items for review			
• Includes Social Security fraud screening			
RentBureau Rent Payment Data			$1 per screening
Includes month-by-month payment history and any collections activity.			
Civil Court Record Reports			
Premium National Civil Court Record Screening	$4	($1)	$3 per screening
• Identifies individuals with prior landlord–tenant disputes			
• Searches civil court databases for civil judgments, landlord–tenant dispute filings, and non-monetary judgments (forcible detainers)			
• Reports contain all involved defendants and plaintiff(s); comments on the case, suits, or petitions filed; and judgment information			
• Supported by Yardi's team of public records analysts and experts			
Criminal Reports			
Premium National Criminal Search	$12	($3)	$9 per screening
Includes national criminal database search, national sex offender search, and OFAC/SDN terrorist search. Records are filtered and serviced by our expert public records analysts.			
Supplemental County/State Criminal Search	$9		$9 per screening
This even more thorough criminal records check is a best practice for applicants from the following states, which deliver limited information to national criminal data repositories: AL, CA, CO, DC, DE, ID, LA, MA, NV, PR, SD, VA, and WY.			

Screening Component	Cost	Concession	Your Price
Optional Add-On Services			
The Work Number: Social Service Verification The Work Number verifies applicants' current income and employment in a HUD-compliant format. A charge only applies when a record is found.	$35	($5)	$30 per screening
The Work Number Social Service Verification: Lookup Fee			$3.50 per screening
Income and Employment Verification • The Work Number offers real-time verification of current income and employment. • If no record is found with The Work Number, NOVA prompts the prospect to upload a pay stub or grant bank access to verify income. • A charge only applies when a record is found.	$10		$10 per screening

Next Steps

Our end-to-end housing platform delivers mobility, transparency, and business intelligence across your agency. Yardi products can simplify your business processes, enhance your intake and resident services, and help you maintain HUD compliance. Please contact me:

Inger Loken Budke
Senior Account Executive, PHA
Inger.Budke@yardi.com
(805) 705-0510 | mobile
(800) 866-1144 ext. 1239 | office

IN THE BOARD OF COMMISSIONERS OF THE

HOMES FOR GOOD HOUSING AGENCY, OF LANE COUNTY OREGON

ORDER 23-29-03-02H | In the Matter of Approving the Execution of an Agreement with Yardi Systems, Inc.

WHEREAS, Housing and Community Services Agency of Lane County doing business as Home for Good Housing Agency (the "Authority") is a public body corporate and politic, exercising public and essential governmental functions, and having all the powers necessary or convenient to carry out and effectuate the purposes of the ORS 456.055 to 456.235 (the "Housing Authorities Law"); and

WHEREAS, Homes for Good Housing Agency has determined that its current PHA software suite, HAB HMS, cannot provide needed functionality for the Agency's growing needs; and

WHEREAS, Homes for Good Housing Agency has determined that the PHA software suite offered by Yardi Systems, Inc. would best meet the Agency's needs; and

NOW IT IS THEREFORE ORDERED THAT:

That the Authority is authorized to negotiate, execute, and deliver on behalf of the Authority, such documents as may be necessary to enter into the agreement with Yardi Systems, Inc. with the proposed pricing outlined in the attachment 1, which includes both stable five year GSA pricing and pricing subject to change CPI depending, as well as pay as you go invoicing model for the screening modules all in the form approved by any Authorized Representative (such approval to be conclusively demonstrated by the signature of any Authorized Representative on such document).

DATED this 29th day of March 2023

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Chair, Homes for Good Board of Commissioners

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Secretary, Homes for Good Board of Commissioners