



Idaho Housing and Finance Association

Request for Proposal

Federal Programs Project Management Software

Issued by: Paula Grow

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Proposal Due Date: 6/5/2026 5pm MST

Introduction

Idaho Housing and Finance Association (IHFA) is soliciting competitive proposals for a Federal Programs Project Management Software solution to manage federally supported projects. Primarily, housing projects from application, underwriting, construction, and compliance. The goal is to consolidate data into a single, auditable database that satisfies HUD, IRS, and IHFA requirements.

Background

Idaho Housing and Finance Association is a State financial institution and administrator of affordable housing financial resources. In its simplest form, Idaho Housing's mission is to provide funding for affordable housing opportunities in Idaho communities where they are most needed and when it is economically feasible.

IHFA is the administrator of Low-Income Housing Tax Credits (LIHTC), Housing Bonds, HOME, HTF, HOME-ARP, ESG, and CoC with resources from the U.S. Department of Housing and Urban Development. These federal resources are often used in conjunction with each other for the creation, preservation, and acquisition of multi-family and single-family housing for income restricted households. Other programs provide support to agencies who support homeless households.

Procurement & Administrative Requirements

In accordance with **2 CFR 200.318-326**, this procurement will be conducted under a Competitive Proposal method. IHFA requests respondents to provide a proposal, in accordance with the terms and conditions set forth herein, to provide services as described in the Scope of Work and Technical Requirements.

- **Closed Bid Process:** All proposals must be submitted in a secure portal. Bids will not be opened until the deadline.
- **Contract Type:** Fixed Price.
- **Evaluation:** Award will be made to the responsible firm whose proposal most aligns with IHFAs goals.
- **Section 3 Compliance:** Preference may be given to Section 3 business concerns that provide economic opportunities to low-income residents.

- **Debarment:** Firms must not be debarred or suspended by the Federal Government (SAM.gov verification).
- If required, is bondable in the State of Idaho

Scope of Work & Technical Requirements

The selected vendor will provide an end-to-end software solution, training to support staff and adoption, as well as provide on-going technical support as needed. They must provide a unified database for all federal and internal funding allocations with the following capabilities: *If there are items your software does not support, please make sure to describe in your response.*

The system should include:

- A secure portal where external partners can communicate with internal staff and submit files in varying file formats (Word, PDF, Excel);
- The ability for multiple users to collaborate on the same project file or application within a secure portal; and
- Security protocols to ensure the security of personally identifiable information as well as proprietary and/or confidential information (e.g., trade secrets, financial documents and Tax ID numbers).
- Provide the ability for database customization by the HFA for state specific information

A. Security, Support, and System Integrity

1. **Role-Based Access:** Granular security based on program/project and role; users see only data necessary for their job functions.
2. **Support:** Live support 8 AM – 5 PM MST, Monday–Friday via phone or ticket management system.
3. **Regulatory Updates:** Timely software updates to remain compliant with evolving HUD/IRS fields, forms, and reporting mandates.
4. **Unified Database:** Single source for funding sources (Federal/Internal) and property info.
5. **Audit Logging:** Detailed field-level logs of actions taken and associated user (Old vs. New values, Timestamp, User ID).

6. **System Interface:** Should be intuitive navigation for all the range of partners who need to interact with it.
7. **Contextual Help:** Embedded instructions/help guides for all screens and fields.
8. **SOC II compliant**
9. **API:** Provide API with Insert/update/read capabilities
10. **Back up –** Provide a nightly back up of database and documents for disaster recovery.

B. Funding, Project Management & Applications

1. **Allocation Tracking:** Manage multiple federal funding types, awards, and program income.
2. **Project Configuration:** Manage complex projects with multiple funding sources, schedules, and compliance.
3. **Online Application Portal:** Configure applications with scoring criteria, document upload capabilities, and automated error-checking for applicants.
4. **Staff Verification:** Electronic workflow for staff to verify/edit applicant data with a feedback loop to the applicant.
5. **Historical Data:** Tools to bulk-load data from Excel or Word.
6. **Ability to track and adjust budgets as needed**

C. Communications & Document Management

1. **Integrated Correspondence:** Send/receive/save emails and documents directly within project and partner files with automation capabilities preferred.
2. **Media Capture:** Ability to attach photos to properties, inspections, and audits, receipts for reimbursement towards grants awarded
3. **Automated Notifications:** Generate and save scheduled letters/notices using database-populated templates.
4. **Communication:** Must have communication mechanism for system to communicate with grant recipient's and other collaborative partners.
5. **Document Storage:** Provide method to store documents and/or interface with document depository and manage electronic file retention policies
6. Provide system search functionality

D. Project Financials and Management

1. **Asset Management:** Individual project and portfolio management; extracting information from the financial audits, annual replacement reserves, and cash flow.
2. **Risk Management:** Assign annual risk management score for future applications. Score is comprised of financials, physical inspections, and tenant files.

E. Property Compliance

1. **Regulatory Reference:** In-system access to HUD rules, income limits, and rent limits, period of affordability.
2. **Property Data:** Ability to capture specific data within a property record.
 - a. To include but not limited to: # of LIHTC units, # of HOME/HTF units, # of market units, # of exempt units, # inhabitable units, Property Placed in Service Date, End of Standard Compliance, End of Extended Use Compliance, End of State Compliance, select if recertifications are required annually.
3. **Mobile Inspections:** Offline-capable mobile app for checklists and photo capture with sync functionality.
4. **Tenant Data Portal:** Secure upload for property managers (large-scale) and manual entry for small properties.
5. **Tenant Data Reports:** Ability to create HUD LIHTC tenant data in xml format.
6. **Compliance Testing:** Configurable engine to run IRS/HUD/IHFA tenant data tests with additional set-asides (ability to toggle specific tests).
7. Provide ability to batch and run evaluations on all or selected properties. Display reports of which properties didn't pass or had validation errors. Ability to finalize any successful evaluations without having to access each record.

F. Reporting

1. **Ad-hoc & Standard Reporting:** Robust reporting engine with filtering (Year/Month/Quarter) and export options (PDF, Excel, etc.).
2. **Reporting:** Ability to collect and report on required data elements for HUD requirements.
3. **Reporting Outputs:** Generate inspection reports in required formats.

4. Ability to produce a report with data from on all compliance activities (Inspections, File Audits, Compliance Evaluations).

G. Homelessness Grants Management

1. **Comprehensive Grants Lifecycle:** Accepts application for Emergency Solutions Grant (ESG), Youth Homelessness Demonstration Program), and Continuum of Care (CoC), manages grant agreements, supports grant financial management (reimbursements, balance of funds per grant, and ability to reallocate funds to different grants), and document storage.

Timeline

The following table outlines key dates and events in the RFP process

May 5, 2026	RFP is available
May 18, 2026	Technical questions or requests for clarification are due
May 22, 2026	Technical questions answered and provided to respondents
June 5, 2026	Deadline for receipt of Proposals to IHFA
June 15, 2026	Notification of those proceeding to presentation phase
June 29- July 3, 2026	Presentation week
July 15, 2026	Target Selection Decision and communication

Proposal Submission and Requirements

Please respond as outlined in this request for proposal and observe the following guidelines:

- Written proposals must be received by emailing to Paulag@ihfa.org by 5pm on June 5, 2026, Mountain Time.
Late submissions will not be accepted
- Must submit current SOC II audit – IHFA will not accept proposals from Vendors who do not have a current SOC II audit.

Proposers must include:

- **Technical Proposal:** Addressing each of the requirements listed above.
- **RFP Questions:** Vendor Profile, Customer Base, Fees and Compensation, Product Overview and Development and Deployment sections
- **Payment terms:** Clear definition of payment milestones
- **Timeline:** Project schedule from contract execution to "Go-Live."

Questions for IHFA

All questions for the RFP must be emailed to: Paula Grow at PaulaG@ihfa.org by May 18, 2026. These will be responded to in one document and provided to all respondents.

Criteria for Selection

The decision of which respondent, if any, to select is solely IHFA's decision. Such decision will be based primarily upon IHFA's determination of cost, service, experience, qualifications, innovation, and/or other factors considered relevant. Seeking proposals does not in any way create an offer by IHFA to contract for any services.

IHFA will rate proposals based upon the following factors:

1. Vendor Capabilities
2. Implementation Plan (including Change Management approach)
3. Product Functionality
4. Industry Experience
5. User Experience
6. Reporting and Analysis
7. Technical Infrastructure/Platform/Integration Options
8. Pricing

Proposal Evaluation

Proposals will be evaluated by a committee of staff members. Following this process, the committee will select certain respondents for a presentation before the committee.

Onsite Presentation

Selected respondents will have 4 hours (s) of presentation time as well as 30 minutes of Q&A time allocated for their formal presentation to the IHFA committee. *Onsite presentations are preferred, but a virtual meeting can be accommodated.*

Selection

IHFA reserves the right to award its Federal Programs Project Management Software business needs to the respondent who presents the best value to IHFA. Any commitment or representations made during these discussions, if conducted, may become formally recorded in the final contract. Written or oral discussions/presentations for clarification may be conducted to enhance IHFA's understanding of any or all the proposals submitted. However, proposals may be accepted without such discussions. IHFA reserves the right to reject any or all proposals for any reason.

IHFA will select the vendor which offers the greatest value as determined in IHFA's sole discretion, which may or may not necessarily be the vendor who offers the lowest price.

Any false or misleading statements found in the proposal may be grounds for disqualification.

The final selection of the successful respondent is scheduled to take place on or by July 15, 2026.

Confidentiality

This document and subsequent responses may contain confidential and proprietary information intended solely for the use of the individual or entity to which it is sent. Reproduction by photographic, electronic, or other means is permitted only for the sole purpose of preparing a response. If a response is not appropriate, or if the vendor is notified they are not going to be given further consideration in this process, the vendor must properly destroy the original document and all companies (including any electronic copies) in the vendor's possession.

Disclosure

The vendor shall not disclose any information concerning this RFP or the contents contained therein to anyone, other than the vendor's employees, officers, and subcontractors directly involved in preparing the vendor's response to this RFP document for the benefit of IHFA. Any disclosure of this document or any of its contents to any

subcontractor requires the same or substantially similar obligations of confidentiality to the vendor's organization.

Idaho Public Records Act

IHFA receives federal resources and is required to comply with Public Records Requests. Responses to this RFP may be exempt from Idaho Public Records Act's "trade secrets" statutes or the following:

§74-107(2) -- Exempt housing production, rental and financing records, sale or purchase records, mortgage portfolio loan documents, or similar business records of a private concern or enterprise required by law to be submitted to or inspected by a public agency or submitted to or otherwise obtained by an independent public body corporate and politic.

If any portion of the RFP is proprietary, please watermark the specific pages in the response. Watermarking the entire response more than likely will not exempt the entire document from a public records request.

RFP Questions:

Please submit responses as part of the Proposal due by 5pm on June 1, 2026.

Vendor Profile

Company Name

Address

Year founded

Public or Private Company

Brief history of your company

Who would be the team responsible for working with IHFA for contracting, implementation, and on-going customer service?

Primary business focus

Please describe your company culture

Please describe your target market

How many clients do you have?

What is the average size (portfolio) of your clients?

Please provide client reference names and contact information (three (3) references).

Do you have any ongoing or past litigation?

Please list any data or privacy breaches within the last five (5) years. If applicable, how did the organization respond/handle the breach?

Is your organization SOC II compliant? When was the last audit of your organization verifying compliance? Please upload the most recent audit.

Please identify what is the customer support provided with the software. Are there additional customer support packages, if yes, what are their costs?

Customer Base

How many customers do you have?

How many new customers have you averaged over the last five (5) years?

What is your customer retention rate?

If your customers were asked, “What is the best thing about your software?” how would they respond?

If you customers were asked, “What is one thing they would like to see improved with your software?” how would they respond?

How often do you engage in customer satisfaction surveys and how do you use the data collected from those surveys?

Do you solicit feature ideas from your customers? If yes, what is an example of a feature idea from a customer which was implemented?

Fees and Compensation

Estimate of all costs for product, implementation, and servicing/support. Should be broken down and itemized by module whenever possible and include:

License Fee

Annual Maintenance

Implementation Costs

Data Migration

Training Costs

Customization Costs

Interface Development Costs

3rd Party Integration Costs

Hosting Fees

Other Monthly Fees

Other One-Time Fees

All Third-Party Costs

Any other costs or fees not captured above

Product Overview

How do you differentiate your Federal Programs Project Management Software from your competition?

What enhancements are planned for your software over the next year?

What internal technology personnel or resources are needed to operate your system?

How does the Federal Programs Project Management Software handle integrations with other third-party systems? Are there any file types the software cannot migrate?

What data points are needed for the migration from existing databases to the Federal Programs Project Management Software?

Has your software or databases ever been breached? If yes, how was it resolved? How long did it take for the company to identify the breach?

Development and Deployment

How much does your company invest back into your product annually, as a percentage of revenue?

How does your company stay current with the changing landscape of technology?

Is your product developed in-house or by third-party?

How do you roll out new upgrades or products to the Federal Programs Project Management Software?

Are all clients on the same version of the Federal Programs Project Management Software or are a percentage of users on versions not updated?

What is the minimum and maximum amount of time between software releases recommended between new versions?

How do you prioritize your product development roadmap?

Are there any IT server or system requirements for your Federal Programs Project Management Software?

What does the typical implementation timeline look like for your Federal Programs Project Management Software?