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VIRGIN ISLANDS PUBLIC FINANCE AUTHORITY/OFFICE OF DISASTER RECOVERY

ADDENDUM NO. 2

Request for Proposals

Housing Case Management System

RFP 012-2025-STX/STT/STJ

This addendum consists of twenty-four (24) letter-size pages (8.5 x 11).

Addendum No. 2 is hereby made part of the RFP 012-2025-STX/STT/STJ for Housing Case Management System. The addendum consists of **Attachment A:** Responses to RFIs, **Attachment B:** Amended Section 2.0, **Attachment C:** Amended Section 10.0, **Attachment D:** Amended Section 18.1 and **Attachment E:** Amended Enclosure Documents D, E and G.

Attachment A:
Responses to RFIs

1. For qualified non-resident vendors with established operations in other states, can the ODR confirm that submitting a Certificate of Good Standing from our home jurisdiction, accompanied by a formal Letter of Commitment to obtain the USVI Business License within ten (10) days of a Notice of Selection, will satisfy the proposal requirement? This approach allows national housing experts to participate while aligning administrative licensure costs with the contract award.
    Answer: This RFP does not require a USVI business license. Please see Attachment D: Amended Section 18.1; and Attachment E: Amended Enclosures D, E, and G.

2. Is a USVI-issued business license required at the time of proposal submission, or may a Respondent submit with a valid Puerto Rico business license and obtain USVI licensure after selection but prior to contract execution?
    Answer: Please see response to Question 1.

3. While on dlca.vi.gov it requires the business licenses applicant to select a type of license. None of the licenses shown are relevant to our business, which would fall under systems integration or software development. Is a business license truly applicable for this RFP? If so, can you specify which one is needed.
    Answer: As stated in Section 4.1, Required Minimum Qualifications of Respondent; respondents must have a valid and active business license. Respondents must provide evidence that they are properly licensed to perform the proposed services and that such licensure is relevant to the Scope of Work for this solicitation. While there isn't a required license type specified for this RFP, the Department of Licensing and Consumer Affairs (DLCA) generally categorizes these activities under "Development of Computer Programs or Systems."

4. What is the expected number of new applicants for each program including the HRRP, RRP, and OAL programs?
    Answer: The application period for the HRRP and the RRRP is closed; therefore, no new applications are currently being accepted. However, the OAL program will expect about 25-40 new applicants.

5. Has the ODR completed the intake process for applicants for each of the 3 programs, or will there be additional intake required with an applicant facing portal?
    Answer: Generally, the HRRP and the RRRP program have completed their intake process; however, previously submitted applications that are in an inactive status may be reactivated during the lifecycle of the Program. Reactivating an application may require completion of intake activities. The OAL program currently has an ongoing intake of applicants. To clarify, the intention of use for the applicant facing portal is not to process intake for applicants, but rather for applicants to interact with the program by uploading program requested documentation, view program status updates and deliver program communications.

6. How many years will the system be used for active case management?
    Answer: Two to three years.

7. Is Canopy being used for the end-to-end platform for program operations, including functions beyond case management such as contractor management, environmental

reviews, etc.? Does the ODR desire for the proposed solution to facilitate the end-to-end workflows for the programs?

Answer: Canopy was used primarily for case management operations. The proposed solution is not expected to fully facilitate end-to-end program workflows; however, it should capture all phases of each program in some capacity. The solution shall support continuation of core case management functions and capture key details related to other program activities, such as construction and environmental reviews, to ensure visibility into the progression of an application from intake through closeout.

8. How long will the contract term be?
   Answer: Please refer to the RFP, Section 5.0, Term of Engagement.

9. Would you prefer for our implementation support to be onsite for a period of time during the process? This will determine whether travel costs are included.
   Answer: No, virtual support is sufficient.

10. Following program completion, how many years of "read-only" access will you require?
    Answer: Records must be easily retrievable and readable for five (5) years after closeout.

11. Will ODR allow respondents to add a column to the Base Quote Sheet to indicate frequency of each line item?
    Answer: Yes.

12. Base Quote Sheet requests pricing for 20-50 users there is only one field for the fee to be totaled, which user fee should be included for submittal?
    Answer: Please add necessary fields/rows to account for pricing variations.

13. The RFP references integration and interfacing with Microsoft Office Suite, SharePoint, ClickUp, and Kahua. Can ODR clarify which of these systems, if any, are expected to be actively integrated as part of the base implementation, versus referenced to indicate that the system must have the ability to integrate if needed in the future? Additionally, can ODR clarify whether any required integrations are expected to involve data exchange, document exchange, or both, and whether they are anticipated to be one-time or ongoing?
    Answer: None of the systems are expected to be integrated as part of the base implementation. SharePoint has been an integral part of the HRRP and the RRRP therefore the desired integration would be ongoing and involve document exchange. The intention for Clickup and Kahua integrations would also be ongoing but involve data exchange.

14. Does the ODR have existing application materials and workflow documentation already established that will be available to support configuration and transition of all program data? Additionally, can the ODR confirm whether all program workflows will be fully defined at the time of contract award, or whether some workflows are expected to be refined or finalized during project kick-off and discovery?
    Answer: The ODR has existing application materials and workflow documentation that will be made available to support system configuration and the transition of program

data. Program workflows are expected to be substantially defined prior to project discovery. However, respondents should anticipate that certain workflows may be refined, adjusted or expanded during discovery and potentially throughout the implementation period to address program needs, operational considerations, or regulatory requirements.

15. The RFP includes Data Migration – including data mapping as part of the implementation scope. Can the ODR clarify the following with respect to the Canopy data migration:

   - Approximately 100,000 documents are expected to be migrated — can the ODR confirm whether these documents are already stored with unique identifiers tied to corresponding case records?
     Answer: Each document will be stored with unique identifiers tied to corresponding case records. Please see Attachment B: Amended Section 2.0.

   - Will all case-related data to be migrated be provided in CSV format, and if so, can the ODR indicate the approximate file sizes of the CSV extracts?
     Answer: Data will be available in Excel spreadsheets, 40 MB.

   - Approximately how many tables or data files will be included in the migration scope?
     Answer: We estimate 42.

   - Will the CSV files include stable unique identifiers that can be used to reliably link case records, household records, and associated documents?
     Answer: Yes. Every record will have a unique objectID that corresponds to the application ID.

   - Can the ODR confirm whether the migration is expected to be a one-time data migration versus any form of ongoing synchronization with Canopy?
     Answer: Yes, it will be a one-time data migration.

16. The Base Quote Sheet includes Data Migration – including data mapping as a single implementation cost category. To ensure accurate scoping and pricing, can the ODR confirm whether data mapping and migration under this category are limited to data sourced from Canopy only?
   Answer: The data included under the Data Migration and Data Mapping cost category is data originally sourced from Canopy. However, the migration will occur from SharePoint rather than directly from Canopy.

17. Can you please confirm whether legal authority to conduct business in the U.S. Virgin Islands is required at the time of contract award, or if it may be obtained post-award but prior to commencement of services?
   Answer: Please see response to Question 1.

18. Section 18.1 (Required Documents) states that the selected respondent shall have 10 days from notice of selection to provide corporate documents and a letter of good standing; however, Enclosure Document D appears to indicate that these documents

are required as part of the proposal submission. Can the ODR clarify whether these documents must be submitted with the proposal or are due within 10 days following notice of selection?
Answer: Please see response to Question 1.

19. Enclosure E requests confirmation of whether the respondent currently holds a business license, while the RFP also references legal authority to conduct business in the U.S. Virgin Islands. Can the ODR clarify whether either or both of these requirements must be satisfied at the time of proposal submission, or whether a respondent that does not currently hold a business license or legal authority may obtain the applicable authorization post-award but prior to commencement of services, without being deemed non-responsive or disqualified?
Answer: Please see response to Question 1.

20. Enclosure E requests three non-ODR client references and a list of current projects under contract, including contract value and percentage of completion. Can the ODR confirm that the project listings requested in Enclosure E are intended to relate to the referenced clients and projects relevant to the proposed services?
Answer: Yes.

21. Pg. 11 of the RFP states "Failure to ask questions, request changes, or submit objections shall constitute the acceptance of all terms, conditions, and requirements in this RFP." Are vendors permitted to include proposed modifications to VIPFA's Terms & Conditions with our response?
Answer: Yes.

22. Has the federally funding been fully allocated to USVI or is the project's funding contingent on future grant awards?
Answer: Fully allocated.

23. What does the file structure of the current SharePoint look like? Are individual instances stored in a way where the documents can be systematically indexed in the new environment?
Answer: Yes, please see response to Question 15.

24. For correspondence translation, for non-electronic correspondence, will the ODR be providing translators?
Answer: No, but there are both English and Spanish correspondences available.

25. For the document version control requirement, is this referring to data entries where an audit trail would meet the requirement or is this referring to file storage referencing a document that can be "checked out" and "checked in" with changes?
Answer: File Storage.

26. What are examples of the configurable time thresholds referenced in the automated notices requirement?
Answer: For instance, when an application receives a positive lead determination and is advanced to a designated status, the system may automatically generate and issue a notification to the applicant based upon a predefined trigger. As another example,

when an application reaches a specified timeframe in the system, such as 12 months from initial approval, the system may automatically generate and/or distribute notification to the applicant requesting income documentation.

27. Can the ODR share notes or transcripts along with participating businesses from the pre-proposal conference held on Dec 29, 2025?
Answer: The ODR can share the pre-proposal meeting agenda, which was made available in Addendum No. 1.

28. Is this a new requirement or is there an incumbent currently doing the work?
Answer: New Requirement.

29. If there is an incumbent, are there remaining portions of the work incomplete or is the ODR considering this procurement initiative a separate independent solution?
Answer: This is an independent solution.

30. If there is an incumbent, are they allowed to bid this initiative?
Answer: No, incumbent.

31. Will the ODR consider the past project experience have to be within a specific number of years similarly to Federal government requirement such as 5 years?
Answer: The evaluation criteria listed in the RFP include consideration of company experience and history with similar entities. Accordingly, respondents are encouraged to provide relevant examples that best demonstrate their qualifications.

32. If the respondent is teaming with other companies, please confirm that the ODR will allow utilization of partners/teaming arrangement (subcontractors etc.) projects qualify as relevant past performance?
Answer: The ODR will consider partner arrangements with qualified past performance.

33. In addition to the Federal space will the ODR consider past project experiences in the State, local or commercial sectors that demonstrate the needed breadth and depth of experience?
Answer: Yes.

34. In section 4.1 of the minimum qualifications, it states "Valid and active business license". Our primary business is to provide software and computer services. We are registered in State of Maryland to conduct Business across the US and have provided services to many US Federal agencies. We can provide articles of Incorporation and a certificate of good standing. Do we also need to have a USVI Business License? Please clarify.
Answer: Please see response to Question 1.

35. Can the ODR describe the current state architecture and technology stack of the housing case management system in use?
Answer: Case management was housed in Hyland's OnBase system (EP3). SQL Server 2016 (SP3). Document repository is also housed in OnBase.

36. Can the ODR please provide a rough yearly budget and/or funds allocated for this contract?
Answer: The ODR is managing $1.07 billion in CDBG- DR funds. Funds will be allocated based on the reasonableness and responsiveness of the respondents.

37. Can the ODR please specify roles that would be considered as Key Personnel? Are we required to submit resumes for the Key Personnel?
Answer: Key Personnel are those individuals who will have a primary role in working with the ODR to develop, configure and support the proposed platform. Typical key personnel for a project of this nature may include program or project managers, business analysts, architects, quality assurance and testing staff, technical leads and other subject matter experts as necessary to perform the work. As outlined in Section 17.0, Proposal Format & Content, Section H. Firm Background/Credentials respondents are required to submit resumes for key staff that will perform the work.

38. Please specify the location for performing work, i.e., onsite, contractor site, remote, hybrid?
Answer: Remote.

39. We saw a size limitation of 20MB for the submission file. Is there a page count limit for the proposal as well?
Answer: No.

40. When does the government expect to make the award?
Answer: The award will be made after the completion of the formal solicitation. Please refer to the schedule or any future addendums.

41. Can the ODR confirm whether program workflows for the HRRP, RRRP, and Own-a-Lot programs are expected to be standardized at system go-live, or whether respondents should anticipate ongoing workflow modifications during the first year of the contract?
Answer: Please see response to Question 14.

42. To what extent does the ODR expect required system functionality to be delivered out-of-the-box versus configured during implementation to align with program-specific requirements?
Answer: The ODR expects respondents to propose a solution that leverages available out-of-the box functionality to the greatest extent practicable, while allowing for flexible configuration during discovery to align with program specific policies, and workflows.

43. Can the ODR clarify whether use of the applicant-facing portal is expected to be mandatory for all applicants at go-live, or whether a phased rollout is anticipated?
Answer: Use of the applicant-facing portal for all applicants at go-live is not mandatory, and a phased rollout of the applicant-facing portal is permissible. Respondents should account for a phased implementation approach as part of their implementation strategy.

44. In addition to the provision of the Case Management System, can the ODR confirm whether respondents are expected to provide operational case management staff (e.g., case managers or program administrators), or whether all case management activities will be performed by ODR personnel using the system?
   Answer: Respondents are not expected to provide any case management staff. All case management activities are performed by ODR staff.

45. Can the ODR provide additional detail regarding the structure, completeness, and consistency of data currently stored within Canopy and SharePoint, including the prevalence of unstructured, duplicate, or incomplete records?
   Answer: The ODR can confirm that a substantial portion of the data is structured, organized, and complete. Respondents should anticipate performing standard data cleansing, deduplication, and formatting as part of the transition and implementation process.

46. The RFP references approximately 100,000 documents for migration. Can the ODR confirm whether this represents the full anticipated migration volume at contract commencement, or whether additional historical documents may be included?
   Answer: Please see response to Question 15.

47. What level of post-migration data validation, reconciliation, and user acceptance testing does the ODR expect prior to formal system acceptance?
   Answer: The ODR intends to be fully involved in all validation, reconciliation, and user acceptance.

48. Can the ODR identify any specific HUD, CDBG-DR, or territorial reports that are considered mission-critical and must be available at system go-live?
   Answer: The ODR considers the following reports to be mission-critical at go-live, though the list is not exhaustive:
   - Application status reports (e.g. active vs. inactive applications and their current program stage)
   - Construction status reports (e.g. under construction vs. completed)
   - Geographic reports (e.g. St. Croix, Thomas, St. John)
   - National Objectives (e.g., low-to-moderate income vs. urgent need)
   - Relocation reports (e.g. number of applicants relocated and associated relocation costs)

49. Does the ODR anticipate any upcoming HUD monitoring reviews, audits, or compliance assessments that the new system must explicitly support during the contract term?
   Answer: While no specific HUD audits or reviews are currently scheduled, the new system is expected to support regulatory compliance, accurate recordkeeping and reporting to facilitate any future HUD monitoring audits or assessments during the contract term.

50. Should respondents assume that financial tracking and reporting will be managed fully within the CMS, or integrated with existing financial management or ERP systems for reconciliation and oversight purposes?

Answer: The CMS will support fiscal tracking and reporting for select application-level cost components, such as temporary housing costs. Other financial activities, including construction management and vendor payments, are handled within external systems. Relevant financial data from those systems will be entered into or integrated with the CMS to provide visibility into an application's overall fiscal status.

51. The RFP references a preference for Microsoft-based solutions. Can the ODR confirm whether Azure-hosted solutions are preferred or required to align with ODR and territorial IT standards?
    Answer: The ODR utilizes the SharePoint platform; its use is preferred but not required.

52. Are there specific cybersecurity, data encryption, access control, or compliance frameworks (e.g., NIST, CJIS, or FedRAMP-aligned controls) that respondents should explicitly address in their proposals?
    Answer: The solution should incorporate data encryption and multifactor authentication for access control.

53. Does the ODR have a target system go-live date, or will the implementation timeline be evaluated based on each respondent's proposed methodology and risk mitigation approach?
    Answer: The ODR has an urgent need for an operational case management system and has identified a target go-live timeframe of approximately three (3) months following contract execution. This timeline is provided for planning purposes and does not represent a mandatory requirement.

54. What level of subject matter expert, program staff, and IT resource availability should respondents assume from the ODR during system implementation?
    Answer: The ODR will be able to provide IT resources and subject matter experts on the data and structure of the existing tables from the previous solution. The ODR Program staff will also be available and involved during system implementation.

55. How does the ODR anticipate managing scope, regulatory, or programmatic changes that arise after go-live (e.g., through task orders, formal change requests, or contract option years)?
    Answer: The ODR will manage changes through formal change requests.

56. Can the ODR clarify whether cost evaluation will emphasize year-one costs, total contract value across the base and option years, or a blended assessment?
    Answer: Cost proposals will be evaluated in accordance with the Cost Evaluation criteria set forth in the RFP. The ODR will review all cost components submitted for the base period which may include option years to assess overall reasonableness, completeness, and consistency with the proposed technical approach and scope of services.

57. The RFP indicates that multiple awards may be made. Can the ODR clarify whether this contemplates multiple systems, or whether awards would be scoped by program, district, or functional area?
    Answer: Please see Attachment C: Amended Section 10.0.

58. Can the ODR clarify whether the anticipated contract structure is expected to be time-and-materials, fixed price, or a hybrid approach (e.g., fixed price for implementation with time-and-materials for ongoing support and enhancements)?
Answer: At this stage, the ODR has not yet finalized the contract pricing structure that will be used for this engagement. The determination of the appropriate pricing model is still under review and will be informed by the final requirements, scope, and complexity of the software system. However, the ODR can confirm that the contract will not utilize a Time-and-Materials (T&M) pricing structure. Additional details regarding the final contract type and associated pricing expectations will be provided once the software system requirements are fully defined, and the acquisition strategy is finalized.

59. The RFP indicates that approximately 100,000 existing documents will be transferred from SharePoint to the new Case Management System. Can the ODR please provide the estimated total storage size (in GB or TB) associated with these documents and confirm whether all such documents are included within the migration scope?
Answer: Please see response to Question 15.

60. Can the ODR please share projected annual document volume (e.g., uploads and attachments) and anticipated data growth assumptions for the CMS over the base contract period and option years?
Answer: The ODR estimates the projected annual document volume to be approximately 2.2 gigabytes. The current system was designed for the initial phases of the program; as additional phases and functionality are built in, increased data volume is expected.

61. If oral interviews are required, how will interview performance be evaluated, given that the current evaluation criteria do not explicitly allocate points to oral presentations?
Answer: As provided in RFP Section 21.0, oral interviews may be required. The purpose of an oral interview is to obtain additional information or clarification regarding the proposed system and its functionality. Oral interviews are not scored.

62. What are the current operations and maintenance budget for the existing Canopy system, including licensing, hosting, and support costs?
Answer: Please see response to Question 34.

63. What is the estimated budget range for the implementation and ongoing maintenance of the new Case Management System?
Answer: Please see response to Question 34.

64. With the ODR managing the different programs such as HRRP, RRRP, and OAL, does the ODR envision these programs to have their own segmented cases managed separately or all cases pooled together?
Answer: Policies, programmatic workflows and compliance requirements can vary between the programs, thus requiring the need to manage cases separately.

65. Section 2.0 The Scope of work states, "The software must be able to identify deficiencies and provide intuitive resolutions." Does the ODR have the current workflows defined and documented for each program/ application type?

Answer: Please see response to Question 14.

66. What will be the input for cases into the system? Is a case essentially a new client application?
    Answer: Each case corresponds to a single client application and includes its associated data elements and supporting documents. Each client application has a unique numeric identifier within the system.

67. Does the ODR have an example of the type of cases to be handled by the system?
    Answer: The proposed case management system will manage case records (applications) submitted by individuals seeking CDBG-DR funding for housing-related activities. For additional details on specific program delivery methods, please refer to Section 1.1 Context of the RFP.

68. Will the case management system be utilized for workflows surrounding the life cycle of a client's initial application or extend into the actual client projects after application approval?
    Answer: The case management system will manage workflows across the full life cycle of an applicant's case from a case management perspective, including closeout. Certain stages within the case management system will require only limited data entry, as additional information is maintained in external systems. However, the CMS must be able to support all stages of an application to provide a complete view of an applications' advancement and status within each program.

69. Can the ODR identify the data currently in the platforms mentioned in the RFP such as ClickUp and Kahua? Also, will these platforms remain in use for the life of the project?
    Answer: At this time, the ODR is unable to provide a detailed inventory of the data in the platforms referenced. These platforms are used to support specific operational functions outside the scope of the proposed CMS. The ODR does not make representations regarding the continued use of these platforms over the life of the project. Respondents should not assume long-term reliance on any existing systems.

70. The ODR mentions migrating 100,000 documents from SharePoint. Is there a reason ODR is moving away from SharePoint vs. an application that can use/access SharePoint and the data that already exists there?
    Answer: Please see attachment B: Amended Section 2.0, for updated document count. The ODR is not moving away from SharePoint; rather, the ODR is replacing its existing case management platform, Canopy. Documents currently stored in Canopy will be migrated to SharePoint, and the selected Case Management System will then be able to migrate and those documents as part of system implementation.

71. We understand from the Scope of Work that there will be a migration of historical applications, active cases, SharePoint documents, and Own a Lot documents. Does the ODR anticipate adding new data as well, and if so, what type and size/amount?
    Answer: Please see response to Question 60.

72. RFP Page 3: What is the total volume of data to be migrated?
    Answer: Please see responses to Question 15.

73. Outside of Microsoft Office/SharePoint, ClickUp, and Kahua, what external systems do the ODR require to be integrated?
    Answer: No additional external system integrations are requested beyond Microsoft Office/SharePoint, ClickUp and Kahua.

74. Are there specific business rules or workflow automations currently in Canopy that must be retained or improved in the new system?
    Answer: Yes.

75. Can the ODR clarify the data structure and quality of the existing Canopy and SharePoint records to be migrated?
    Answer: Please see responses to Questions 15 and 45.

76. Is the proposed system expected to support multiple languages, and if so, which languages should be included?
    Answer: English, Spanish and French/Creole.

77. Other General Requirements state, "Provider must be able to demonstrate experience with Community Development Block Grant-Disaster Recovery Programs, specifically supporting OWNERS that administer housing programs, process controls, and case management activities." This requirement, if maintained, would not only disqualify the majority of local service providers and developers but also solutions providers and platforms that far exceed the CDBG-DR process and program requirements. The ODR limits its options with this requirement, especially given the broad nature of compliant off-the-shelf case and financial management platforms that meet and exceed the described scope of work. Can this requirement be omitted?
    Answer: This requirement is intended to ensure that respondents demonstrate familiarity with federally funded disaster recovery housing programs, associated compliance obligations, and case management processes. Consistent with 2 CFR Part 200, Subpart D, ODR will not exclude otherwise qualified respondents solely on the basis of how experience is demonstrated. Respondents may satisfy this requirement through comparable experience or through proposed solutions that meet or exceed the functional, technical, and compliance requirements for the proposed software system.

    Alternate or substitute services, products, or deliverables may be accepted or rejected at the sole discretion of the ODR. Any proposed alternates or substitutes must be accompanied by the respondent's certification and evidence demonstrating that the function, characteristics, and performance of the proposed solution are equal to or superior to those specified in the RFP.

78. In section 6.0 PRICE AND PAYMENT, it states, "For purposes of this solicitation, the Respondent must estimate based on the assumption that personnel will work an estimated 40-hour work week; however, ODR reserves the right to amend the final number of hours that should be worked." Does the ODR intend for this contract to be an hourly staffing agreement or a fixed price contract?
    Answer: Respondents are not expected to provide personnel. Please see responses to Questions 44 and 58.

79. For Enclosure Document D, Contract Document Checklist, can you confirm that only the Business License needs to be included in the proposal and that the remaining documents, such as Articles of Incorporation, are due upon award?
    Answer: Please see Attachment D: Amended Section 18.1 and Attachment E: Amended Enclosure Documents D, E, and G.

80. Since this is not a construction contract, can you confirm that bonds are not required?
    Answer: Confirmed.

81. What is the volume of cases that will need to be migrated into the system?
    Answer: Please see response to Question 15.

82. Would appointment scheduling functionality be needed or useful as part of the case management functionality?
    Answer: Yes. Appointment scheduling functionality would be useful.

83. What is the average number of cases that will be managed in the system annually?
    Answer: Approximately 2,077 cases.

Attachment B:
Amended Section 2.0

2.0 SCOPE OF WORK

The software solution must be able to identify deficiencies and provide intuitive resolutions from the beginning of the term as well as strategically expand functionality over the life of the contract. Selected Respondent must be able to provide these services for the full term of the contract. The solution provider will only perform and cause the solution to perform those tasks directed and approved by ODR.

Work performed without approval will be considered out of scope and may not be reimbursed by ODR. The Solution and Solution provider must be capable of performing the following functions:

1. **Integration & Data Migration**
   - Interface with application software's such as Microsoft Office Suite and SharePoint.
   - Integrate with existing external and internal databases such as ClickUp and Kahua.
   - Provide or integrate a reliable calendar system that enables users to schedule, track, and communicate appointments and deadlines.
   - Offer built-in communication tools such as emails and messaging capabilities, allowing users to send and receive messages on a given case record.
   - Migrating all raw data from SharePoint into the new CMS in order to replicate previously documented information in Canopy.
   - Have the capacity to retrieve a transfer of **61,949** existing documents from SharePoint to the new CMS. Respondents are expected to provide any limits or restrictions on document storage capacity.
   - Must agree that ODR will own all data related to the services provided.

Attachment C:
Amended Section 10.0

10. NUMBER OF AWARDS

ODR anticipates making a single award pursuant to this RFP for the implementation and support of one Housing Case Management System to be used across applicable programs and districts.

Attachment D:
Amended Section 18.1

18.1 Required Documents

Respondents must submit the following documents with their proposal:

A. **Employer Identification Number (EIN) -** The Respondent must provide an official copy of their EIN.

B. **Unique Entity ID (UEI)** – Each respondent must submit a UEI that is actively registered on SAM.GOV
https://www.sam.gov/SAM/pages/public/index.jsf

C. **Business License** - The Respondent must provide evidence that the company is currently licensed to do business specific to the RFP.

D. **Corporate Documents –** The Respondent will be required to provide a copy of their Corporate Documents.
  - Corporation
    - Copy of Articles of Incorporation & By Laws
  - Limited Liability Company (LLC)
    - Copy of Articles of Organization
    - Copy of Operating Agreement
  - Sole Proprietor
    - Copy of Trade Name Certificate

E. **Letter of Good Standing if Corporation or Certificate of Existence if LLC -** The Respondent will be required to provide a copy of their Letter of Good Standing or Certificate of Existence from their respective State or Territory. A copy of the receipt that demonstrates evidence of filing the company's Annual Report for the current year will be acceptable as well.

Failure to provide the required documents may result in the proposals deemed non-responsive and may be immediately disqualified with no further consideration given for potential awarding of the contract.

Attachment E:
Amended Enclosure Documents D, E and G

ENCLOSURE DOCUMENT D

VIRGIN ISLANDS OFFICE OF DISASTER RECOVERY
Contract Document Checklist

Name of Respondent: _____

Contact Person: _____

Telephone Number: Office_____ Mobile_____

1. ____   Respondent Corporate Documents

       ___ Corporation   ___ Copy of Articles of Incorporation & By Laws

                                           ___ Letter of Good Standing/ Copy of receipt demonstrating Annual Report is filed.

       ___ LLC   ___ Copy of Articles of Organization

                                             ___ Copy of Operating Agreement

                                             ___ Certificate of Existence/Copy of receipt demonstrating Annual Report is filed.

       ___ Sole Proprietor   ___ Copy of Trade Name Certificate

2. ____   Current Business License   Expiration date: ___/___/20___

        Type of business license: _____

3. ____   Employer Identification Number (EIN)/Social Security Number (SSN): _____

4. ____   DUNS # _____ SAMS # _____

                           --*For ODR use only* -

1. ____   Proposed Scope of Work   EBID#_____ RFP#_____ RFQ#_____ IFB# _____

2. ____   Bids   ___Proposals   ___ Signed Evaluation Spreadsheet ___ Recommendation

3. ____   Request for approval from Legal Counsel and Executive Director.

Legal Counsel: _____

Date approved: __/____/20_

Adrienne Williams-Octalien, Executive Director: _____

Date approved: __/____/20_

Date submitted to BOD for Contract Approval: __/____/20_

Suggested # of Days in Contract _____

Mobilization/Payment Terms: _____

Outstanding Issues: _____

ENCLOSURE DOCUMENT E

VIRGIN ISLANDS OFFICE OF DISASTER RECOVERY
Respondent's Qualification Statement

Name of License Holder: _____

Name of Company/DBA (if any): _____

Legal Status: (check one) ☐Corporation ☐LLC ☐Sole Proprietorship ☐Partnership

Business Location (office): _____

Mailing Address: _____

Telephone Number: _____ Fax Number: _____ Email: _____

Website address (if any): _____

Do you have a current Business License? ☐Yes ☐No

Number of Years licensed to conduct business _____

Type of License(s) _____

Number of scope related services completed in the last 5 Years _____, Average value of these Contracts $_____

Do you have plan to use Subcontractors? ☐Yes ☐No If yes, company_____

Have you ever failed to complete a project, been fired, sued by one of your clients and/or found in default of contract terms? ☐Yes ☐No

If yes, explain on another sheet, if a Performance Bond or other means were used to resolve the issue and the circumstances and the outcome.
Are there or have there been any; Claims, Arbitration, Judgments or Liens against you? ☐Yes ☐No

If yes, explain on another sheet, the circumstances and outcome.

List three non-ODR references that can be contacted for their input concerning your abilities:

1) Client Name _____   Contact Number_____
2) Client Name _____   Contact Number_____
3) Client Name _____   Contact Number _____

List your current Projects under Contract (Project Title or Clients Name), Value (Contract Value) and Percentage of Completion:

1) Client Name _____ Value: _____ % ____
2) Client Name _____ Value: _____ % ____
3) Client Name _____ Value: _____ % ____
(If you have more contracts, please list on separate sheet)

Respondent shall certify that the above information is true and shall grant permission to the ODR to contact the above-named person or otherwise verify the information

ENCLOSURE DOCUMENT G
VIRGIN ISLANDS OFFICE OF DISASTER RECOVERY

Subcontractor's Statement Form

I have read and understand the RFP and the final version of the proposal submitted by

_____.

Print Name: _____

Subcontractor Company Name: _____

Title: _____

Signature: _____

Date: _____