

# RESOLUTION NO. 2024 – JHA – 27

## TO AUTHORIZE THE AGENCY TO ENTER AN INTERLOCAL AGREEMENT (PIGGYBACK) WITH GILSON HOUSING PARTNERS TO ESTABLISH A CALL CENTER FOR IMPROVED PUBLIC HOUSING SERVICE

**WHEREAS,** Within Section 14.2.B.5 of HUD Procurement Handbook 7460.8 REV 2 it states that a Housing Agency (HA) may purchase “supplies and services through a local, county or State government’s supply, service or equipment contractor.” This practice is also encouraged and allowed by 24 CFR 200 (b)(e). The Jacksonville Housing Authority (JHA) is electing “piggy-back” on Contract 22-35 with the Houston Housing Authority for Call Center management services.

**WHEREAS,** staff has prepared the attached contract proposal for providing call center services for the Jacksonville Authority with Gilson Housing Partners, based on a previously established agreement with the Houston Housing Authority to the Board for consideration per JHA approval threshold guidelines for contract values in excess of \$150,000 annual value; and

**NOW, THEREFORE, BE IT RESOLVED BY THE JACKSONVILLE HOUSING AUTHORITY THAT,** the Jacksonville Housing Authority Board of Commissioners hereby authorizes Jacksonville Housing Authority to enter the interlocal agreement to establish call center activities and their associated services provided by Gilson Housing Partners

**ADOPTED:**

\_\_\_\_\_  
**Heather Horovitz, Board Chair**

\_\_\_\_\_  
**Date**

\_\_\_\_\_  
**Approved by Office of General Counsel**

# **EXHIBIT A**

## **Initial Proposal to JHA Regarding Scope of Service Based on Houston Housing Authority Agreement**



*Proposal  
To The  
Jacksonville Housing Authority  
(JHA)*

*For*

*Gilson Reception Call Center Services*

*May 9<sup>th</sup>, 2024*

Victoria Park Centre  
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April 29<sup>th</sup>, 2024

Evann Morris  
**Director of Information Technology**  
Jacksonville Housing Authority  
1300 Broad Street N.  
Jacksonville, FL 32202

Evann:

Thank you for the opportunity to provide you with a proposal to the Jacksonville Housing (JHA) for the Housing Choice Voucher (HCV) Departments. **Gilson Housing Partners (GHP)** are responding by utilizing the Gilson Reception Call Center (GRCC) Service for Housing Authorities.

Our Reception Call Center Services are in a unique position to support all JHA programs because we provide low-income callers with experienced CSR's that understand their needs. Our proposal provides you with information related to providing the Jacksonville Housing Authority (JHA) with an omnichannel call center for the JHA callers with a superior customer service experience. <https://youtu.be/J9kYNQ4IECA>

We have developed our Gilson Call Center System to provide the callers with a variety of self-service options. This includes the ability to receive helpful information via text, emails, videos, and links to JHA's System or Web Site or our Web Reception Caller Center System or our iResident Services App.

We would like to highlight a few services and features that we provide and makes our Service better and why JHA should Partner with Gilson Housing Partners.

1. **Enhanced IVR Process:** Our Interactive Voice Process is enhanced because we have programmed the IVR functions to integrate from our phone system to our Call Center and Web PHA Partner System. This provides us the ability to:
  - a) Receive a call from a resident our Landlord and read their phone number and automatically retrieve all their information and display for the CSR when answering the call including the last 4 calls received from the resident.
  - b) Provide integrated selection from voice prompts by the resident that then provides them information such as place on the wait list, outstanding rent balance, and much more.
  - c) Automatically Email or Text the resident desired or required based on IVR prompts
2. **HA Video Production:** A new feature we are providing Clients is the production of video's related to the Services that we are providing. Most of these videos are:
  - a) explaining new programs or
  - b) instructional about how to navigate the Client Web Site to be able to process or perform functions.
  - c) Example: Please review the Rental Assistance Program for Eligible Residents video we created for CMHA. <https://youtu.be/K36zWE2It9c>



3. **Reception Services Data Analyst:** We recently added a 2 data analysts to our Call Center Division. These positions include one from Reception and the other for the Maintenance Call Center. The responsibilities of these analysts are to provide our Clients with informative data related to the calls and activities that are being processed and sending detailed and summary reports to our HA Clients. These reports will include a variety of KPI's based on the requirements of our HA Clients. This will include basic information like the number of calls, type of calls, wait times, hold times, handle time and abandoned calls. However, this will included more important information related how long it takes a HA Staff or CSR to follow-up on requests, % of types or requests and much more. This enhanced service will be at no additional cost to our HA Clients.

4. **Call Center System**

We are excited that we are launching our **Call Center & Phone System** to the Housing Authority market. These products have been developed for our internal use and we determined that since we designed specifically to utilize for our Housing Authority Clients these products would be able to increase the efficiency and productivity of these Clients.

*Included in this proposal we will be providing our Call Center System to JHA HCV Department at no cost.* This will provide the ability for JHA HCV and PH staff the ability to review information for all phone calls received by our CSR's in the system. Additionally, HCV and PH staff also can record phone calls within this system. We would be pleased to provide a demonstration of the system to JHA staff's at their convenience so they could experience the benefits.

5. **VOIP Phone System:** If awarded a contract, we will be able to provide JHA with the ability of purchasing our VOIP Phone System that also includes group messaging and video conference. This system is like having a Housing Authority Cloud phone system with "Zoom" and "Slack" all put together with specific functions designed for Housing Authorities.

Our Cost proposal provides the Jacksonville Housing Authority (JHA) with different options. These options include:

Services to handle all HCV/PH Department Calls based on:

	Option 1 (1,400 Vouchers)	Option 2 (6,882 Vouchers)
a. Fixed Daily Fee	\$102.08	\$431.17
b. Fixed Hourly Fee	\$12.76	\$53.77
c. Cost Per Call	\$2.10 Per Call	\$1.80 Per Call
d. Cost Per Minutes	\$.70 Per minute	\$.60 Per minute

The benefit to JHA of the fixed fee is that this includes unlimited call and minutes. The benefit to JHA of the cost per call is that this would include all minutes for a call greater that 3 minutes. We provide these options because we believe that our efficiencies listed above will eliminate duplicate and triplicate calls (resident calling more than once). We are estimating 49/239 calls per day. Our quote is based on the history with other Housing Authorities and *we will need to have the option to modify the daily estimate if we determine the actual number*



*of calls to be closer to your quoted number.*

We perform our Call Center Service for only Housing Authorities and currently Service over 145 Housing Authorities from 100 units to over 9,500 units and from Miami to the District of Columbia, Huntsville, Al to Dallas and El Paso, Texas, to Los Angeles, Ca. We perform our Call Center Service for Clients that have 4 to 5 calls a day to Dallas and Los Angeles that can reach over 1,000 calls per day.

Our service handles approximately 5,500 calls per day and this volume is about the same for any day of the week (Except Monday's when the volume is higher after the weekend) since we have Clients that utilize different services either 24/7, After Hours and Weekends Only, Weekday Only, etc.

Since we originally started as a Software Company, ***we were able to develop an excellent Call Center Reception System.*** We perform a unique service since we can enhance our Call Center System via our Software Division to accommodate operating idiosyncrasies from our HA Clients. This enables us to assist our Customer Service Representative (CSR) with productivity software enhancements in handling Reception calls.

We recently enhanced our Reception Call Center System for the Houston Housing Authority, Southern Nevada Regional Housing Authority and Cincinnati MHA based on this concept. These Housing Authorities wanted 1.) to send us every morning an informational email of what was happening at the Authority that would increase the call volume and 2.) to provide an identifier for each call that can be assigned to a funding source and provide a report for their Accounting Department, to name a few.

Within the first month of implementation, we 1.) enhanced our system for HHA to automatically import the email and then add the information on the CSR's bulletin board with a.) highlights of information to provide callers and b.) questions to ask callers to post in their Yardi System and 2.) enhanced our database structure for HHA to provide a funding source by Call Category and produced a custom report.

Due to our continued improvement process, we continue to increase our efficiency for our Housing Authority Clients from January thru July has for our Reception Call Center Service has resulted in an average handle time per call of 2 minutes and 52 seconds with an average wait time is 28 seconds and for our Maintenance Call Center Service has resulted in an average handle time per call of 2 minutes and 07 seconds with an average wait time is 48 seconds.

#### Reception Call Center Service:

Our Reception Call Center will answer all calls from residents, applicants, citizens, employees, properties, landlords, vendors, and all others. We will provide information related to all JHA programs including Housing Choice Voucher, Supportive Services, and all other programs.

Our Customer Service Representatives (CSR's) will assist all callers with the application process, eligibility, resident services, homeless initiatives, meetings, news and all other requests. This will provide the JHA staff with the ability to work directly with residents in processing applications, re-certifications, inspections, work orders, and deal directly with the most important issues.

Our Director, Reception Call Center is currently analyzing your HCV & PH programs, website and other information that he can find and setting up our system so if you decide to move forward, we are ready. We are always hiring staff and interviewing every week. Most of the staff that works in our Reception Call Center are promoted from either our Inspection or Maintenance Call Center Departments.

We designed the system to be most efficient for our CSRs to process a call and also provide JHA Staff, Citizen's, Residents with most information possible. We have done this by including the following factors for each call:

1. Call Type (i.e. Applicant, HCV Resident, PH Resident, Landlord, Vendor, etc)
2. Call Category (i.e. Annual Recertification, HQS Inspection, Emergency Relocation, etc)  
For each Category, we provide JHA the ability to provide us with an unlimited number of **Caller Questions** to ask the caller to ensure our CSR is obtaining the appropriate information
3. Call Action (i.e. , Rent Increase, Change of Income, etc)  
For each Action, we provide JHA the ability to provide us with an **Caller Instructions** so that when the CSR has completed the call an email will be sent to them with a list of instructions on how to perform an action or information related to the item.
4. *We have integrated our phone system with our Call Center Reception System and the system automatically reads the incoming phone number and searches the database and retrieves all prior application and resident data that have been recorded thus improving our CSR's efficiency and reducing the handling time.*
5. All Call information can be emailed to a specific JHA staff or multiple staff.
6. *We can communicate with JHA Housing Program Specialists directly via our chat App. We provide them with a Communication App that our Customer Service Representatives (CSR's) will be able to immediately text to them if they require information related to an emergency call.*
7. All calls are recorded in the Notes section of the resident or landlord notes section of the Yardi System.
8. Finally, the system is very flexible and can be customized for DBHA

During the business analysis sessions of implementation, if JHA provides our project manager with detailed specifications we will be able set-up our Call Center System to fully utilize all functions thus reducing the minutes per call and saving JHA \$.

Even though, language translation is not a **All our CSR's are bi-lingual in English & Spanish** which is required in our hiring process. We also utilize a translation service for up to an additional 50 languages. We worked with our Clients in South Florida, District of Columbia, and Louisiana clients and hired a few CSR's that speak Creole.

All our Customer Service Representatives (CSR's) are trained and then retrained quarterly and annually related to our Client (JHA) Operations. Our CSR's are trained and then retrained annual related to HA and Maintenance Operations including attending NAHRO Certifications working towards Certifications in Maintenance Management (CMM), Public Housing (C-PHM) and Property Operations (CMPO).





As part of our training and retraining classes, we provide ***cultural proficiency training***. Based on the diversity of our Housing Authority residents, applicants, and visitors many are from cross cultural settings, and we want to ensure our CSR's are able to handle all calls.

Our future will bring many changes and we are:

1. Currently working on an integration with our Systems and the Yardi system with several Housing Authorities to improve the productivity and accuracy and hopefully in the future with Yardi.
2. In 2022, we released our iResident Services App to assist with our Recertification Processing and Maintenance Call Center Departments, Please review this video: <https://youtu.be/1pjuvuhIvqvww>
3. In 2023, we are enhancing our iResident Services App to perform Remote Video Inspections (RVI's) based on HUD Notice PIH2020-31 through the integration with the Gilson Software iNSPIRE Inspection App that is utilized by our Inspectors.
4. In 2024, we are also adding to the iResident Service App for residents a SmartLock Access to open their Apartment door.
5. Additionally in 2024, we are launching our iLandlord Service App so Landlords can view all information related to all their units and residents for Reception Call Center Services and HQS Inspections including notifications and reminders.
6. Finally, during 2024, we will be enhancing the iResident Services App to provide residents the ability to call or chat with our CSR's 24/7 for all ***Reception Call Center HA Clients***.

***Our goal is to exceed your expectations and we will continue to attempt to do this every day.*** We are confident that we will attain this goal and are hopeful that you will provide us the opportunity to develop a partnership with your organization. Matt Gilson will be the primary contact and if you have any questions regarding this proposal, please do not hesitate to call me at (888) 252-2338 x-100, (954) 292-2596 or e-mail me at [matt@gilsonsoftware.com](mailto:matt@gilsonsoftware.com).

Best Regards,

Matt Gilson  
President

Cost Proposal for the *Housing Authority of the City of Alameda*

A.

Option 1-Reception Services <i>Section 8</i> (Estimate 1,050 Calls or 3,150 Monthly Minutes)					
Reception Services <i>Section 8</i> (Estimate 1,425 Calls or Monthly 4,275 Minutes) <sup>2</sup>					
Description	Amount		Estimated Minutes	Cost Per Minute	Estimated Monthly
<b>Option 1</b>	(1,400 Units)	Calls			
<b>Section 8 Vouchers</b>	Intake/Waitlist 15% (4)	158	474	\$.70	\$331.80
<b>Call Breakdown</b>	Re-Exams 35% (4)	366	1,098	\$.70	\$768.60
	Inspections 20% (4)	210	630	\$.70	\$441.00
	General 15% (4)	158	474	\$.70	\$331.80
	Accounting 15% (4)	158	474	\$.70	\$331.80
<b>Total</b>		<b>1,050</b>	<b>3,150</b>	<b>\$.70</b>	<b>\$2,205.00</b>
		Days		<b>Cost Per Day</b>	
	Fixed Cost Per Day	21.6		\$102.08	\$2,205.00
	Fixed Cost Per Hour	21.6	8 Hours Per Day	<b>Cost Per Hour</b>	
			172.8 Hrs/Month	\$12.76	\$2,205.00
<b>Option 2</b>					
<b>Section 8 Vouchers</b>	(6,882 Vouchers)	Calls			
<b>Call Breakdown</b>	Intake/Waitlist 15% (4)	774	2,323	\$.60	\$1,393.80
	Re-Exams 35% (4)	498	5,420	\$.60	\$3,252.00
	Inspections 20% (4)	285	3,097	\$.60	\$1,858.20
	General 15% (4)	774	2,323	\$.60	\$1,393.80
	Accounting 15% (4)	774	2,323	\$.60	\$1,393.80
<b>Total</b>		<b>5,162</b>	<b>15,486</b>	<b>\$.60</b>	<b>\$9,291.60</b>
	20 Days				
		Days		<b>Cost Per Day</b>	
	Fixed Cost Per Day	21.6		\$430.17	\$9,291.60
	Fixed Cost Per Hour	21.6	8 Hours Per Day	<b>Cost Per Hour</b>	
			172.8 Hrs/Month	\$53.77	\$9,291.60
Set-up Fee	Option 1/Option 2				<b>\$350.00/\$550.00</b>

- a. Cost Per Minute (CPM 0 to 4,000 minutes @ \$.70) (CPM 4,001 to 8,000 minutes @ \$.65) (CPM 8,001 to 16,000 minutes @ \$.60) (CPM 16,001 to 24,000 minutes @ \$.55) (CPM 24,001 Plus minutes @ \$.50)
  1. Public Housing Estimated Calls per month based on information provided by JHA. Public Housing Call Based on 60% of total units excluding work order calls or 151 calls per month at 2 minutes 30 seconds per call.

Section 8 Calls based on 75% or 362 calls per month at 3 minutes and 00 seconds per call or 1,086 minutes per month.

2. Estimated calls for the Reception Services for Public Housing excluding Work Orders include 1.) Intake/Waitlist calls to check status on Waitlist and questions related to the application process and requesting an application of 15%, 2.) Re-exams calls to check status and request information related interviews, documents and other questions related to the re-exam process of 45%, Accounting calls related to resident receivable balances of 20% and 4.) General calls related to questions concerning the program or trying to talk to a specific of 20%.
3. Estimated calls for the Reception Services for Section 8 include 1.) Intake/Waitlist calls to check status on Waitlist and questions related to the application process and requesting an application of 15%, 2.) Re-exams calls to check status and request information related interviews, documents and other questions related to the re-exam process of 35%, 3.) HQS Inspections related to scheduling and results of 20%, Accounting calls related to Landlord payable balances of 15% and 4.) General calls related to questions concerning the program or trying to talk to a specific of 15%.
4. If applicable, the Public Housing Roll Over is based on number of approximately 275 units per Public Housing Specialist or 1 Public Housing Specialist. With one specialist out the overflow or roll over would be 33%. The Section 8 Roll Over is based on number of approximately 325 units per Section 8 Housing Specialist or 2 Section 8 Housing Specialist. With 1 specialist out the overflow or roll over would be 50%.
5. Minimum is based on ensuring that GCCS maintains the appropriate CSR's on staff to handle the JHA Reception line even when volumes are low.
6. Set-up Fee to set-up the Gilson Call Center RingCentral System with the groups, users, queues, housing program specialist RingCentral app, phone numbers, email addresses, etc.

***B. Experience and Qualifications:***

**Executive Summary**

Gilson Software has been dedicated to developing software products and services that utilize the latest technology for the affordable housing markets for over 24 years. The Gilson Software management team prides itself in forming partnerships with its clients and other vendors in order to develop the kind of solution and service that is able to re-invent their operations and make them more efficient and effective and comply with regulatory requirements.

Please review this video to provide you with an overview:

<https://youtu.be/Ztl8vq5rv1Y>

Gilson Software provides software and services for three different Affordable Housing markets including Housing Authorities (HA), Project Based Contract Administrators (CA) and Affordable Housing Owners and Agents (O/A). We supply these markets with our PHA Partner, CA Partner and Property Partner Enterprise-wide Software Systems and our Property Management Call Center, QAI Inspections and PIC Services.

We market all of our products and services independently to our markets through the integration to any other HA, CA or O/A Software Vendor. Many of our clients utilize other Software Vendors products and we integrate our software solutions to these products. We have accomplished this by developing a File Repository Service that reads PIC/TRACS/TIC files and/or a specific designated Excel Spreadsheet from these third party software products and uploading to our products thus keeping all systems in synchronization. We also provide many Web Service programs that provide and extract data from/to these systems thru the use of staging tables.

With our goal to be the most innovative software and services firm in the affordable housing market, we have developed a specialty with Mobile Wireless Handheld and Voice Solutions. We provided you with a listing of our products in our original proposal. I am listing below the Mobile App for the Reception Process and have included information related to this App as we currently have developed the following Mobile and Voice products:

***iRecertify Web & Kiosk App***

***iResident Services App***

***i.) w/ Smart Lock Function***

***ii.) w/ Remote Video Inspection (RVT's) Integration***

**Coming Soon:**

***iLandord Services App***

***iApplication App***

***iUPCS-V (NSpire) Inspection***

***iEvacuate***

**Software Operations:** In 2008, Matt started Gilson Software and purchased a small Public Housing software firm with a DOS based software package and 80 housing authority clients. In less than two years Matt developed a technical and customer support team and developed PHA Partner, which is a Window Based System. Due to the competition in this marketplace Matt developed a strategy to specialize in Mobile and Voice Technologies and to become the most innovative software firm in the market place.

The first step was to develop a technical staff with these skills and during this time developed the first Mobile HQS inspection software utilizing Windows Mobile. The team moved forward with Mobile Work Order and launched these products within a few existing clients. During this development process it was determined that a better platform for these products would be on an iPhone and iPad and thus the direction was changed and within 6 months completed these enhancements. At the same time the Team developed Interactive Voice Response system and enhanced all the mobile systems to include voice recognition.

Since our first Mobile software solution over 11 years ago, Gilson Software has become the first and only software vendor to market our products to Housing Authorities utilizing of vendors Housing Management Software. We have been able to do this because we have built a program that updates our PHA Partner System with the PIC files and/or a specific designated Excel Spreadsheet from either the HA's Housing Management System or directly from the PIC system. Additionally, we have an established a set of staging tables that we send and retrieve data from other HA's Systems. As a result, of this capability our sales effort increased four times and we normally add a new HA to our client portfolio every month.

Finally, as we became specialists in Mobile and Voice systems and Services it became apparent that Housing Authorities also needed assistance with other services.

**Call Center for Maintenance:** Gilson Software was also the first Affordable Housing software vendor to develop iWork Order an App to eliminate paper and make Housing Authority maintenance operations more efficient. The iWork Order App that was developed over 9 years ago has been installed at over 30 Housing Authorities. At the same time, we also developed an Interactive Voice Response (IVR) application that would provide the capability for tenants to call a specific number and via a voice attendant create work orders that can be created and synchronized to the iWork Order App.

During these installations a general theme continued to come up from Housing Authority staff 1.) They wanted to have their tenants talk to a live person, 2.) They wanted to reduce the amount of time performing data entry into their systems thus improving their productivity and 3.) Their current answering service did not understand the Affordable Housing business and handled many other businesses and they could not provide the quality that they desire.

As a result, the Gilson Software-Property Management Answering Service was formed to ensure that this service could be accomplished and the above goals could be met.

Since the inception of the service we have added over 50 Housing Authorities as clients and add at least

one additional Housing Authority per month to this service.

**Inspection Division Services:** Our approach is to provide a unique and effective operation by operating the Scheduling and Reporting (Back Office) functions by our Inspections Division. We determined that through the utilization and combination of the Gilson Software voice and inspection software products, the utilization of the skills of our Property Management Answering Service Staff, we could develop the most qualified inspection service.

As the result of the development of this service, we continue to improve both the iNSPIRE Inspection App and PHA Partner Inspection Scheduling module thus improving the service to our client but also their Landlord, Resident and Service Provider.

Finally, as we continued to become specialist in Call Center functions for Housing Authorities it became apparent that Housing Authorities also needed assistance with other services.

**Reception Call Center:**

Some of our Property Management Answering Service for Maintenance clients realized immediately that we performed high quality work and we started to obtain requests to perform Answering Services for other functions such as Wait List Purge, launching of an Application Cycle, and Inspection and Recertification calendar services.

As a result, we commenced our Reception Call Center, which continues to evolve by adding more and more services every day including but not limited to:

- Applicants, Tenants or other HA Clients are assisted by highly knowledgeable, bi-lingual Call Center staff members who are able to give proper instructions based on HA provided information.
- Landlords call to obtain information relate to payments and abatements and the scheduling and results of their inspections.
- Call Center CSRs provide applicants with updated Wait List status information, plus information related to the HA's programs and/or Properties.
- Tenants are provided with information related to their re-certifications or inspections, can change their interview or inspection dates and obtain information related to their rental or account balances.
- The iReception Software automatically emails HA Staff of changes made by the Call Center staff based on applicant and tenant assignments.
- HA Staff notifies Call Center staff of times when they are busy or "Do Not Disturb Time" and Call Center staff will take recorded voice mails and email to HA Staff phone.
- We now include as an option to this service the capability of adding our iReception Software App are installed on Kiosks in the HA Lobby and provided on the HA Web Site to streamline the process and provide Applicants, Tenants and Other HA Clients with 24/7 access to information.

Over the past five years we have created a niche market of not replacing a Housing Authority operations as other vendors perform but act as a partner to improve their service to their clients and reduce their cost in this ever-changing market.

### **Re-Exam Processing:**

Finally, as the result of changes due to the COVID Pandemic our Housing Authority required and requested assistance with their Re-examination Processing. As a result, our Re-examination Processing Service was created and we are performing this function for all affordable housing programs including but not limited to Public Housing, Section 8 Vouchers, Project Based Vouchers, Tax Credits, and more. Our process starts with the planning of re-exams to be processed to the completion that includes submission of the PIC files including the following tasks:

- Plan for Re-exams to be completed in the next 120 days
- Send letters & Emails to all Reexam participants with 90 to 120 days
- Verbally communicate with all Re-exam participants within 90 to 120 days
- Counsel with Re-exam participants about:
  - Determine if they are technically challenged, if not assist in downloading the iRe-Exam App and if they are challenged work with them in producing the forms & mailing
  - Changes for their households including additions, employment changes, medical issues, etc
  - Review information that needs to be submitted
  - Method of processing (Web, Kiosk, Paper, etc)
- At time of receipt perform review and perform missing document review
- Calculate re-examination changes and send appropriate documents to participant
- Update Housing Authority Software and obtain approval from Housing Authority
- Submit PIC File, if included in our functions

### **Maintenance Services:**

Finally, during 2019, we were requested by one of our Housing Authority Clients, if we could assist them with their After-Hours Maintenance Services. They believed that since we were already performing the 24/7 Maintenance Call Center and they were utilizing our iWork Order App it was the next logical step.

They were correct and as a result, we launched Gilson Maintenance Services performing the following two Maintenance Services:

1. After Hours Maintenance Service
2. Make Ready Maintenance Service

We have integrated our three services to optimize the efficiency to the Housing Authority by:

#### **After-Hours Maintenance Service:**

- a. When our CSR receives a resident call they communicate the information if an emergency with the Gilson Maintenance staff and the information is sent to the On-Call Staffs iWork Order App,
- b. The App provides directions, records all information related to the work order including time, inventory, and pictures
- c. The information from the App is submitted back to the CSR and they then close-out the work order in the HA System
- d. On a weekly basis, the Gilson Staff provides Client Management with After Hours Maintenance statistics such as number of work orders, average time, cost, savings, etc

### Make Ready – Unit Turn

- i. When we receive a request from the HA to Make Ready a unit the Maintenance Supervisor completes an Inspection of the unit utilizing the iUPCS Inspection App using the Make Ready Inspection Template
- ii. From the App, we submit a “Take Off” Sheet with estimated time and cost and estimated date the unit will be available for move-in.
- iii. From the Inspection App, it creates the appropriate work orders in the iWork Order App which the maintenance staff completes to record the work order including time, inventory, and pictures
- iv. The information from the App is submitted back to the CSR and they then close-out the work order in the HA System
- v. On a weekly basis, the Gilson Staff provides Client Management with Make Ready Maintenance statistics such as unit turn time, number of work orders, average time, cost, savings, etc

We continue to improve our Maintenance Service and now provide quality maintenance work and numerous analytical tools to improve the HA’s efficiencies. We perform the following functions prior to commencing work with an HA Client to ensure that quality maintenance is performed:

- (ii) Gilson Maintenance Director interviews numerous local subcontractors prior to hiring to ensure quality work
- (iii) Maintenance Director review subcontractors prior work before initiating a subcontract
- (iv) Maintenance Director provides subcontractor coaching and training during on-site visits
- (v) Maintenance Director performs QC reviews of work performed in Client units



**References:**

**Clients Implemented in Fourth Quarter 2019:**

*New Haven Housing Authority (Maintenance – After Hours)*  
*Housing Authority of the County of Santa Barbara (Maintenance & Reception Services)*  
*South Bend Housing Authority (Maintenance & Reception Services)*  
*City of Tampa Public Works*  
*Lorain Metropolitan Housing Authority*  
*Winn Residential Corp*  
*Envolve Communities*  
*Metropolitan Development and Housing Agency (Nashville)*

**Clients Implemented in 1<sup>st</sup> Quarter 2020:**

*Dallas Housing Authority*  
*Deerfield Beach Housing Authority*  
*Florence, AL Housing Authority*  
*Peoria Housing Authority*  
*Chattanooga Housing Authority*  
*Hayes Gibson Property Services*

**Clients Implemented in 2<sup>nd</sup> Quarter 2020:**

*Charlotte County, Fl Public Works*  
*East Chicago Housing Authority*  
*Central Falls Housing Authority*  
*College Park Housing Authority (Reception Call Center)*

**Clients Implemented in 3<sup>rd</sup> Quarter 2020:**

*H2 Hospitalist Medical Center*  
*Housing Authority of Chester County*  
*San Francisco Housing Authority*  
*Ruston Housing Authority (Reception Services)*  
*CT Housing Partner (Bridgeport, CT)*  
*Chattanooga Housing Authority*  
*Peoria Housing Authority*  
*Yolo Housing Authority*

**Clients Implemented in 4<sup>th</sup> Quarter 2020:**

*Sacramento Housing and Redevelopment Agency (Reception Services)*  
*Allentown Housing Authority (Vaccine Management Service)*  
*New Haven Housing Authority (Maintenance – 24/7)*  
*Oakland Housing Authority (Reception Services)*  
*Beaumont Housing Authority*

**Clients Implemented in 1<sup>st</sup> Quarter 2021:**

*Harris County Housing Authority  
Birmingham Housing Authority  
Roscoe Property Management Company-Fair Park  
Ruston Housing Authority (iReception)  
Saratoga County Mental Health (Medical)*

**Clients Implemented in 2<sup>nd</sup> Quarter 2021:**

*District of Columbia Housing Authority-(Maintenance Call Center)  
District of Columbia Housing Authority-(Reception Call Center)  
San Diego Housing Commission  
St. Petersburg Housing Authority (Maintenance Services)  
Roscoe Property Management Company-Fair Oaks  
City of OmJHA Public Works Department*

**Clients Implemented in 3<sup>rd</sup> Quarter 2021:**

*Roscoe Property Management Company-Fair Oak  
Leominster Housing Authority (Inspection Services)  
Burlington Housing Authority (Reception and Maintenance Call Center)  
South Bend Housing Authority (Inspection Services)  
Minneapolis Housing Authority  
Macomb County Public Works*

**Clients Implemented in 4<sup>th</sup> Quarter 2021:**

*Michigan City Housing Authority  
Cincinnati Metropolitan Housing Authority (Maintenance Call Center)  
Cincinnati Metropolitan Housing Authority (Reception Call Center)  
Cincinnati Metropolitan Housing Authority (Recertification Processing)  
Hartford Housing Authority (Inspection Services)  
Southern Nevada Regional Housing Authority  
Worcester Housing Authority*

**Clients Implemented in 1<sup>st</sup> Quarter 2022:**

*Newport Housing Authority (Maintenance Call Center)  
Newport Housing Authority (Reception Call Center)  
Jamestown Housing Authority (Recertification Processing)  
El Paso (EP Home) Housing Authority (Inspection Services)  
Salt Lake City (Housing Connect) Housing Authority (Inspection Services)  
Housing Authority of the County of Santa Barbara (Inspection Services)  
Gainesville Housing Authority (Recertification Processing)*



**COVID-19 Reception Clients**

*City of Dallas Housing Authority  
Dayton Housing Authority  
County of Santa Barbara  
Greenburgh Housing Authority  
City of College Park  
South Bend Housing Authority and more*

**Dallas Housing Authority**

3939 N Hampton Rd  
Dallas, Texas 75212  
*Contact: Ms, Shannon Bramlet, Public Housing Director*  
[Shannon.Bramlet@DBHAntx.com](mailto:Shannon.Bramlet@DBHAntx.com)  
Services Provided: Property Management Call Center-After Hours Only w/ Data Entry

**Housing Authority of the City of Los Angeles**

2600 Wilshire Boulevard, 4<sup>th</sup> Floor  
Los Angeles, CA 90057  
*Contact: Mr. Mark Sanford , Public Housing Director*  
[Mark.Sanford@DBHA.org](mailto:Mark.Sanford@DBHA.org)  
Services Provided: PMCC-After Hours Only w/ Data Entry into Yardi

**Cincinnati Metropolitan Housing Authority**

2600 Wilshire Boulevard, 4<sup>th</sup> Floor  
Los Angeles, CA 90057  
*Contact: Ms. Marquita Flowers, Public Housing Director*  
[Marquita.Flowers@cintimha.com](mailto:Marquita.Flowers@cintimha.com)  
Services Provided: PMCC-After Hours Only w/ Data Entry into System. Reception Call Center Service and Recertification Processing Service

**Housing Authority of the County of Santa Barbara**

815 W Ocean Ave  
Lompoc, California 93436  
*Contact: Mr. Sanford Riggs, Deputy Director*  
Office: 805.736.3423 ext. 4030| Fax: 805.735.7672 |  
[sanfordriggs@HASBARCO.ORG](mailto:sanfordriggs@HASBARCO.ORG)  
Services Provided: HQS Premium Inspection Services. Maintenance Call Center Services, Reception Call Center Services



**Huntsville Housing Authority**

200 Washington Street  
Huntsville, AL35804

Contact: Ms. Terry Boyd, Director of Housing Operations  
(256) 532-5637

[tboyd@huntsvillehousing.org](mailto:tboyd@huntsvillehousing.org)

Services Provided: Property Management Call Center-24/7 with Data Entry

**Hialeah Housing Authority**

75 East 6th Street  
Hialeah, FL 33010

Contact: Julio Ponce, Executive Director

Hialeah, FL 33010

[jponce@hialeahhousing.org](mailto:jponce@hialeahhousing.org)

Services Provided: Software and Answering Services

**Allentown Housing Authority**

1339 W Allen Street  
Allentown, PA 18102

Contact: Dan Farrell, Executive Director

(937) 910-7500

[dfarrell@allentownhousing.org](mailto:dfarrell@allentownhousing.org)

Services Provided: Wait List and Landlord Maintenance, PMCC-24/7, Vaccine Mgmt

**Metropolitan Development and Housing Authority (Nashville)**

712 South Sixth Street  
Nashville, Tennessee 372062

Contact: Rita James, Purchasing Agent - (615) 252-8432

[rjames@Nashville-DBHA.org](mailto:rjames@Nashville-DBHA.org)

Services Provided: Call Center Services After Hours, Weekends and Holidays Only

**Oakland Housing Authority**

1180 25th Avenue  
Oakland, CA 94601

Contact: Mr. Mark Schiferl, Director of Property Management

[mschiferl@Oakha.org](mailto:mschiferl@Oakha.org)

Services Provided: Property Management Call Center-24/7 with Data Entry into Yardi System

**Housing Authority of the City of El Paso**

5300 E. Paisano Dr.

El Paso, Texas, 79905

Contact: Ms. Judith Estrada, EP Housing Operations and Management Enterprises, PFC

[JEstrada@hacep.org](mailto:JEstrada@hacep.org)

Services Provided: Property Management Call Center-24/7 with Data Entry into Yardi

**Corpus Christi Housing Authority**

3701 Ayers Street

Corpus Christi, TX 78415

Contact: Ms. Corinne Lisefski, Purchasing Agent

[corinne.lisefski@hacc.org](mailto:corinne.lisefski@hacc.org)

Services Provided: Property Management Call Center-24/7 without Data Entry

**Yonkers Housing Authority**

1511 Central Park Avenue

Yonkers, NY 107

Contact: Mr. Anthony Senerchia, CIO

[asenerchia@DBHAcY.org](mailto:asenerchia@DBHAcY.org)

Services Provided: Work Order Software and PMAS Services

**Huntsville Housing Authority**

200 Washington Street, Huntsville, AL 35804

Contact: Ms. Terry Boyd, Director of Housing Operations

[tboyd@huntsvillehousing.org](mailto:tboyd@huntsvillehousing.org); (256) 532-5637

Services Provided: Property Management Call Center-24/7 with Data Entry

**Housing Authority of Kansas City, Mo**

920 Main Street, Suite 701, Kansas City, MO 64105

Contact: Angel Contreras, Assistant Director of Maint. & Facilities

816.968.4240 [AContreras@hacKc.org](mailto:AContreras@hacKc.org)

Services Provided: Property Management Call Center-24/7 with Data Entry into Yardi Yardi

*“And Many More*



## B. Methodology

### Proposed Services/Approach

#### **Gilson Call Center Services (GCCS):**

##### a. GCCM Information Summary:

As is stated in the Executive Summary, Gilson Software was the first and only Affordable Housing Software Vendor to create a Call Center Services and mainly only for Housing Authorities. We have been adding at least two new Housing Authority Clients per month and we perform the following:

Our Call Center operation is 24/7 and has been for 13 years. We have the capability of adding as many CSR's to the system as possible.

Our service handles approximately 2,500 calls per day and this volume is about the same for any day of the week (Except Monday's when the volume is higher after the weekend) since we have Clients that utilize different services either 24/7, After Hours and Weekends Only, Weekday Only, etc.

We perform our Call Center Service for mainly Housing Authorities and currently Service over 100 Housing Authorities from 100 units to over 9,500 units and from Miami and Hialeah, Fl. To District of Columbia, Birmingham and Huntsville, Al to the Los Angeles, Santa Barbara and Oakland, Ca. We perform our Call Center Service for Clients that have 4 to 5 calls a day to over 400 per day.

Due to our efficiency, our average handle time per call for our Housing Authority Clients from March to July has been 2 minutes and 17 seconds and the average wait time is 24 seconds including the integration into the Clients System.

Many of our clients that are After Hours/Weekend Only will roll over their phones at any time of the day due lunches, meetings or because they have to leave the office and we are set-up to handle the overflow.

All of our CSR's are fluent in Spanish no translation is necessary. It is requirement to be bilingual in Spanish and English to work as a Customer Services Representative (CSR's). At the time of hiring, they are tested in both languages. By ensuring that all CSR's are bi-lingual no calls need to be transferred to another CSR which is more efficient.

Also, we have a high number of calls of a particular language, we hire a CSR with this proficiency as we did with Creole in the South Florida area with Miami, Hialeah and Palm Beach.

We utilize an interpretation service that provides us an additional 50 languages which we mainly utilize for our West Coast Housing Authorities for different Asian languages. We have included the cost of this service in the cost proposal below. All the Authority has to do is let us know DBHAt languages that they require and we do the rest.

TOP 50 LANGUAGES TRANSLATED WORLDWIDE	
1. English	26. Hindi
2. Spanish	27. Czech
3. Vietnamese	28. Portuguese (Portugal)
4. Chinese	29. Turkish
5. Russian	30. Hungarian
6. Korean	31. Greek
7. Japanese	32. Slovakian
8. French	33. Bosnian
9. Portuguese (Brazil)	34. Kishwahili
10. German	35. Urdu
11. Arabic	36. Spanish (Castilian)
12. Italian	37. Finnish
13. Tagalog	38. Swedish
14. Hmong	39. Danish
15. Cambodian	40. Samoan
16. French (Canada)	41. Hebrew
17. Farsi	42. Javanese
18. Armenian	43. Somali
19. Dutch	44. Croatian
20. Spanish (Mexico)	45. Napalese
21. Lao	46. Burmese
22. Haitian Creole	47. Bengali
23. Polish	48. Malay
24. Punjabi	49. Mien
25. Thai	50. Ukrainian

Contracted with both AT&T Relay Services ([http://relayservices.att.com/content/2/tty\\_relay\\_2.html](http://relayservices.att.com/content/2/tty_relay_2.html)) for TTY services for the Housing Authority hearing impaired population.

We also contracted with Sorenson Communications that provides world-class communications products and services that break down communication barriers between deaf, hard-of-hearing, and hearing individuals. Sorenson Communications offers the highest-quality video interpreting service, Sorenson Video Relay Service® (SVRS®), and the Sorenson ntouch® suite of products (ntouch® VP videophone, ntouch® PC, ntouch® for Mac®, ntouch® Tablet, and ntouch® Mobile). All the Authority has to do is let us know how you would like us to market this service to your tenants and we will work with the Authority in doing so.

Call Processing:

We have provided a Niche Service to the Housing Authority market and:

When a tenant calls, the system retrieves all their property, unit and prior work order information from their phone number or by searching their name and/or address thus providing a better customer service experience for the tenant.

When the CSR receives the call the On-Call staff is displayed for their review and the last calls are also displayed to ensure that duplicate calls are not created.

When the CSR is creating the call record they obtain a listing of all Emergency Categories/Activities and the priority is displayed. For all emergency calls the system automatically sends a text to the On-

Call personnel and prompts the CSR to make the phone call.

If the On-Call personnel does not answer, then the system will automatically send to the appropriate CSR a reminder to make follow-up phone calls.

When the CSR selects the Categories/Activities the system prompts them to ask predefined questions so that they can provide the HA staff with appropriate information in the call description.

When the call is created by the CSR it is automatically created in the Resident App and can be synched to the on-call staff's & supervisor's Android or iPhone to provide additional information, if applicable. From the device, additional information can be added including notes.

In our Call Center Operations area we have added two 27" Monitors with the National Weather Service so that we can provide the CSRs with up to date weather forecast and temperatures and so that the supervisors can better manage staffing levels.

b. Staffing:

Daily, we measure wait times to ensure that we have the appropriate number of CSR's are working the appropriate time shifts. We also utilize our supervisors to pick up overflow calls.

Secondly, we have cross trained our three Department specialty's so that all departments (Reception, Inspection and Maintenance) can take calls for all departments to even the flow of calls.

Finally, we have our "Bull Pen" which are staff that are On-Call in case of an increase in the level of calls due to weather, a major issue at an HA Client (like Power Outage), or CSR's calling our ill.

Our CSR's are trained specifically related to Public Housing Maintenance and Operations and Other Housing Authority programs.

Due to the above efficiencies, our daily review of wait time and changes daily and weekly of our staff, we answer calls within 3 rings with the goal of answering on the first ring.

Our SOP is that calls can not be placed on Hold by our CSR's unless they are calling an On-Call staff for a clarification.

The GCCS goal is 98% and we do everything possible to exceed this goal. When rating our CSR's the standard is 95% of our measurements which are very strict call criteria for them to meet.

From our QC Survey's and CSR reviews we will provide the JHA Director of Operations with a monthly and quarterly report. The Director can request any specific information they may be interested and we can have our Software Department make the appropriate changes to our reports.

c. CSR Training



We perform both training and coaching at GCCS. At the time a CSR they are provided training and the provide all our CSR's with quarterly customer service, housing management operation and maintenance training and perform daily Quality Control reviews. Any changes in Clients policies and procedures are reviewed during the monthly and quarterly training sessions.

Ms. Marilyn Tomas (Director Client Support) would be the Director that would lead Ismael Sancez CSR-Trainer to perform the training and hiring if necessary and be responsible to communicate implementation status with JHA during this process

All of our CSR's have been trained in the use of the All HA systems including Yardi, Yardi, MSI, and many more as we perform GCCM Service for at least many Large Yardi & Yardi Clients

d. Gilson Call Center System (GCCS)

DBHAt we have done that is unique is to enhance our Call Center System to integrate into our purchased Answering Service Software System,

- i) We Created programs to integrate with all Housing Authority/Property Managers Housing Management Software to provide for uploading of PIC, TRACS and TIC files ensuring that when our CSRs receive phone calls we would already have all information on the tenants and units. We also store the phone number that the tenant calls in from and link this number to the tenants record so that the next time they call it automatically pulls up their information.
- ii) We developed a iReception App that we set-up for every client that specifically makes it easier for handicap residents to enter calls/information and check on the status.
- iii) Enhanced our Software to include On-Call Schedule thus when a call was entered the system would automatically text On-Call staff and also prompt the CSR to make the phone call to the appropriate On-Call staff.
- iv) *Then we enhanced this function so that the On-Call Staff can respond that they received the text (Text Back) so the CSR does not need to call and bother them, if HA Management decides to implement.*
- v) Enhanced the system with reminders that auto prompt the CSR to call the On- Call staff when they do not answer the phone.
- vi) ***Created a "Text Blast" function that allows the CSR to send a Text Blast to all residents that we have collected their cell phone numbers. This would occur when there is a power outage, the water is shutdown or other building or project maintenance situations.***
- vii) Enhanced the system with Category/Activity definitions so that the system and the CSRs know

DBHAt calls are emergencies. We also list on the screen the last four calls created for a tenant/unit so that duplicate calls are not entered into the system.

viii) From the Category/Activity we have created a question template so that CSRs answer the questions that are necessary and will provide HA staff with the appropriate information.

e. GCCS System Set-up

Our Call Center system Property List will include all Properties & HCV Residents. The On-Call Schedule is set-up by Program, Time Range and By Trade within the programs, if applicable/needed. Our system is set-up with a 4-level hierarchy.

During the implementation of our service, we import all the Properties from the HA System and import into our GCCM System. This includes the AMP information and when setting up the On-Call Schedule in the GCCM system each AMP/Property is assigned the On-Call Staff.

We review all specific scripts, systems and protocols and develop specific JHA SOP's. We will provide JHA Standard Operating Procedures for HA's policies and procedures. We will work with HA Staff and develop Standard Operating Procedures and will obtain approval prior to Going Live.

Our standard Area and Category/Activity list in the GCCM System complies with and follow the HA Category/Activity as listed in HA Work Order System and UPCS Standards. As a result, our CSR's are able to retrieve an extensive list of Jobs/Tasks which we match to the Category/Activity Codes and the system provides them the guidance to determine if it is an emergency, urgent, routine, inspection, etc. Also, we provide the CSR's the ability to make a Non-Emergency and Emergency if they believe the situation needs an immediate attention. These changes are normally related to situations that occur to elderly or disable residents.

We will enter Category/Activity in our GCCS system and when a CSR is entering a call and selects the Category/Activity, the system will identify the call as an emergency, Urgent or Routine Work Order and at the same time they record the information.

HA also can provide us with additional scripts/questions that they would like our CSR to ask the resident and the CSR will include the answers in the notes for the On-Call maintenance staff. By including this information it provides the maintenance staff very important information related to a specific task. In these questions HA can identify jobs that they will be charged a fee.

When the CSR selects the emergency job our GCCM System will automatically send to the On-Call staff a text with all information related to the work order. The system also automatically makes the outgoing phone call for the CSR to the On-Call Staff. If the On-Call staff is not available, then the system will remind the CSR to call back the On-Call staff.



We include information related to COVID including if there is any one sick in the household. We also will allow WA the ability to provide us with a list of Quarantined units so we make sure we do not send anyone to these units.

As part of our training and retraining classes, we provide cultural proficiency training. Based on the diversity of our Housing Authority residents, applicants, and visitors many are from cross cultural settings and we want to ensure our CSR's are able to handle all calls.

We have a training manager to train all CSR's in proper phone and customer service etiquette, send staff to NAHRO classes and also send our Customer Service Representatives (CSR's) to the Hialeah Housing Authority within the first 6 months for reviews and training.

f. GCCS System Functions:

Our GCCM System automatically reads the phone number from the caller/resident. If they have called prior the system pulls up their record which includes the residents Property and Unit and the last four work orders for that resident. If the caller has not called in the past then the Customer Service Representative (CSR) simply enters the resident name or address and the system will pull up that record. All calls come thru the same number that identifies the call coming from a JHA resident. The system records this phone number for the resident so that either the GCCM Service or JHA can send out Text Blasts to residents related to issues at the property or building level such as no power or any water issues.

Our Gilson Call Center System has been designed specifically for Housing Authority Maintenance Call Centers. During the implementation of our service, we import all the Properties from the JHA System and import into our GCCM System. We describe much more later in this proposal, however; since we also have a Software Department we continue to enhance the system to accommodate all changes to the business.

Our GCCM system Property List will include all Properties. The On-Call Schedule is set-up by Property, Time Range and also By Trade within the Properties, if applicable/needed. Our system is set-up with a 4 level hierarchy as JHA has listed.

If the staff need to contact our CSR's we have a designated line for staff to call in and bypass the normal HA line and reach a supervisor or manager immediately at (888) 251-8876.

The first On-Call staff will be sent a text, email (if desired) and phone call at the time the call is entered. The above information is included in the text and email or will be provided to the On-Call staff when the CSR contacts them. If the On-Call does not answer, then after (time requested by HA) xx minutes the CSR will call the On-Call Again. If the On-Call does not answer, then after (time requested by HA) xx minutes the CSR will call the On-Call a third time. If the On-Call does not answer, then after (time requested by HA) xx minutes the CSR will call the Second On-Call Representative. If the Second On-Call does not answer, then after (time requested by HA) xx minutes the CSR will call the third On-Call Representative. If the third On-Call does not answer, then after (time requested by HA) xx minutes the

CSR will call the fourth On-Call Representative and if they do not answer the cycle is repeated until someone is contacted.

Anytime any On-call Roster information Changes, HA will email the information to the email [GCCM@gilsonsoftware.com](mailto:GCCM@gilsonsoftware.com) and the Supervisor working at that time will make the changes immediately. Additionally, HA staff can post these changes to the GCCM System Bulletin Board which is where HA staff and our Customer Service Representatives (CSR's) can share critical information.

### Sample Text



Matt Gilson  
To Matt Gilson

Reply	Reply All	Forward
-------	-----------	---------

Mon 3/23/2020 12:2

Emergency WO #37174  
Job: Plumbing - Leaking Faucet/Pipes  
Job Notes: Testing COVID 19 field - Plumbing - Leaking Faucet/Pipes 954-812-5266  
Unit: 00 127 TC  
Apt:  
Address: 1651 N Park Ave  
Project: 16 Park  
Building: 500016  
Job Area: Bathroom  
Tenant: Gray, Tyra L.  
Tenant Home Phone: 954-812-5266  
Tenant Work Phone:  
Tenant Cell Phone:  
Someone Sick: YES  
Permission to Enter: YES. Please reply RECEIVED to confirm as acknowledgment

Huntsville Call Center Performance for April 23rd to 25th

MG Matt Gilson  
 To 'Tracie McCann'; 'mnorment@hsvha.org'; 'tmcginnis@hsvha.org'; 'Terry Boyd'  
 Cc **Gilson Software & Call Center Management**

Reply Reply All Forward  
 Mon 4/26/2021 12:15 PM

- You replied to this message on 4/27/2021 11:33 AM.
- Huntsville Call Center Performance Report 042321 to 042521.PNG 197 KB
- Huntsville Work Order Report April 23-26.pdf 120 KB
- Resident Text.PNG 49 KB

Huntsville Team, Good Morning:

I am attaching the Daily Call Center Reports for the Huntsville Housing Authority for April 23<sup>rd</sup> to 25<sup>th</sup>

1. Summary Report with a graph
2. Detailed Work Order Report with Notes/Descriptions

There were 27 calls. *With the improvements that we made and the QC Reviews we have improved the average wait time to 23 seconds (44 seconds less the 21 second Announcement).*

We have completed the programming for the automatic texting, completed the testing and the system was updated today.

I have attached a copy of the text that the residents will receive with the Emphasis work order number. Also, we can implement the following:

1. Send a follow-up Text from iWork Order App that Maintenance Staff is on their way to the unit
2. Follow-Up text from iWork order App that the job has been completed with the job completion notes.
3. If desired, include in the Text at the bottom a listing of any open Work Order Jobs

Should you have any questions or suggestions.

Thanks Very Much,

Stay Safe and Be Well

Matt

Gilson Software and Call Center Services  
 (888) 252-2338 x-100  
[matt@gilsonsoftware.com](mailto:matt@gilsonsoftware.com)



PMCC Client Daily Wait Time Report 04/23/2021 12:00 AM - 04/25/2021 11:59 PM

Download Save Delete Subscribe

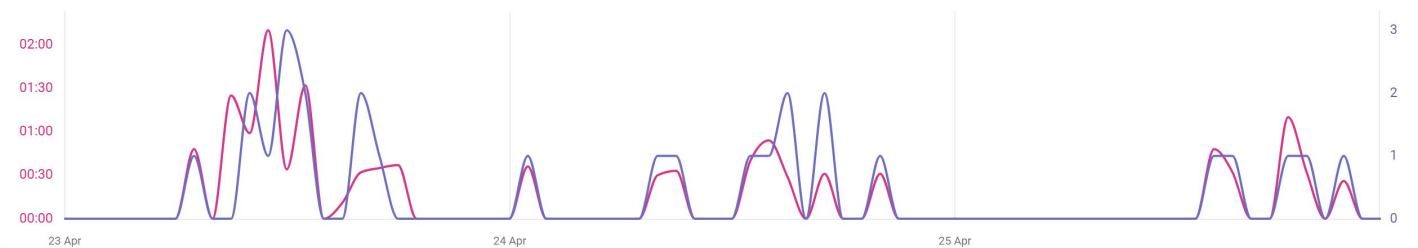
Queues Users Calls Meetings

QUEUES 3 of 106 Queues CALL TYPE All Types CALL LENGTH All Length

Queue KPIs Select KPIs

27 # Answered 02:28 Avg. Handle Time 00:44 Avg. Wait Time 4 # Holds 0 # Refused

Trend PRIMARY METRIC Avg. Wait Time SECONDARY METRIC # Answered Hour Day



Queues Select Columns

Total 3 Queues Show: 100

Name	Ext	# Answered	Avg. Handle Time	Avg. Wait Time	# Holds	# Refused
Huntsville	315	27	02:28	00:44	4	0

g. GCCS Reports:

A report is produced in the morning and emailed to the distribution list provided by HA. We generate Daily and monthly work order Reports and monthly statistical reports. We also have graphical reports that have been requested by some clients which are included. We can have our Software Department make the appropriate changes to our reports upon request. I have attached a copy of the work order report as part of this response.

Reception Sample Report

Dallas Housing Authority Public Housing Reception Report									
September 15, 2021 12:0 AM - September 15, 2021 11:59 PM									
Session Id	Caller Name	Caller Number	Caller Email	CSR	Time Created	Caseworker	Caller Type	Call Category	Call Description
113351	Cindy Saunder	469-258-7966	<a href="mailto:urexoduswalkwithgod@gmail.com">urexoduswalkwithgod@gmail.com</a>	Veronica Perez	6:19 PM	Gilson Reception Call Center	Applicant	RentRelief Program EMERGENCY ONLY	The caller request assistance for know more information about the program. She currently have Cancer and need help with her rent. Please CB ASAP 469-258-7966
113350	Denisha Lewis	281-889-3581		Veronica Perez	5:56 PM	Gilson Reception Call Center	Applicant	RentRelief Program EMERGENCY ONLY	The caller request a CB since she had a misscall from Daniel Mitchell. She is facing eviction since she did not receive any payment from the RRP. Please CB ASAP 281-889-3581
113348	Lisa	0		Rodrigo Bustamante	5:42 PM	Gilson Reception Call Center	Applicant	Portability (Section 8)	Informed the caller that currently, DHA is accepting portability clients and DHA is billing at this time.
113347	Denisha Lewis	(281) 889-3581		Paula Muniz	5:37 PM	Gilson Reception Call Center	Applicant	RentRelief Program EMERGENCY ONLY	Caller requests for us to reach out to her LL to confirm to them that she was approved for the rental assistance. Contact info. LL - (214) 999-1343 - assitant@villasatkatytrial.com
113346	Denisha Lewis	(281) 889-3581		Paula Muniz	5:36 PM	Gilson Reception Call Center	Applicant	RentRelief Program EMERGENCY ONLY	Caller requests for us to reach out to her LL to confirm to them that she was approved for the rental assistance. Contact info. LL - (214) 999-1343 - assitant@villasatkatytrial.com
113344	Keith Dooley	(662) 556-4495	<a href="mailto:nahmang@gmail.com">nahmang@gmail.com</a>	Paula Muniz	5:26 PM	Gilson Reception Call Center	Applicant	Application Intake	Caller requests to be contacted ASAP, to set up an appointment to come into the office to check if his AI was submitted properly. The caller has been calling since 8/23 and hasn't been contacted yet. Contact
113343	Jordan Young	702-582-1285	<a href="mailto:stl4@icloud.com">stl4@icloud.com</a>	Mariana Perez	5:24 PM	Gilson Reception Call Center	Applicant	RentRelief Program EMERGENCY ONLY	The caller needs to update his application, he needs to receive the payments to be mailed to him directly to 2602 Hondo F apt 310 Dallas TX 75219 since the LL is not able to accept the checks but money orders only

**h. Reception or Application Process Example.** I am listing a below an example of how we set-up a function for the Southern Nevada Regional Housing Authority to send text to a resident and the text will provide a method for the resident to learn how to perform the function. Please read below.

- We set up our system to retrieve the personal information of the caller
- In this case, an Applicant called to find out how he could apply.
- We use the Call Action field to choose “Call to Apply Instructions.”
- The memo area is filled out automatically saying DBHAt was informed about. These notes will be on the report sent to the agency the following day.
- The yellow notes are additional FAQ the representative can see once he chooses the call action “Call to Apply (Instructions)” which is connected to the Category field “Call to Apply.”

### New GRCS Call/Caller Record

<p><b>Caller Type</b> Public Housing Resident</p> <p><b>Property</b> Wait</p> <p><b>TEST</b></p> <p>1234</p> <p>1088 W. Liberty</p> <p>Cincinnati Ohio 45214</p> <p><b>Contact Phone Number</b> 9543616280</p> <p><b>Contact Email Address*</b> Caller Contact Email Address</p> <p><input checked="" type="checkbox"/> Caller Does Not have Email Address</p> <p><b>Second Email Address To Send</b> Second Email Address To Send</p>	<p><b>Call Category</b> Call to apply</p> <p><b>Call Action</b> Call to apply (Instructions)</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> <p>-----</p> <ul style="list-style-type: none"> <li>List a Property (LL)(Instructions)</li> <li>Dropped Call</li> <li>Forms Online (Instructions)</li> <li>Rent Cafe Issues/PORTAL (Instructions)</li> <li>Complaint (Instructions)</li> <li>Details Update (Instructions)</li> <li>Waitlist Status</li> <li>Portability (Instructions)</li> <li>Emergency Assistance (Instructions)</li> <li>Application Process (Instructions)</li> <li>Maintenance WO Template</li> <li><b>Call to apply (Instructions)</b></li> <li>Resource Guide (Instructions)</li> <li>Why my WL list number keep changing?</li> </ul> </div>
--	---

**Questions!**  
Ask the following questions and answer them in the message field:

- If you select the Call Action Call to apply (Instructions), a Text message (SMS) with instructions will be sent to the
- For the SMS to be SENT, the Call Action Call to apply (Instructions) MUST be used.
- To apply, visit the Housing Authority's website [https://www.snrha.org/fh\\_howtoapply.html](https://www.snrha.org/fh_howtoapply.html). Find the "SNVRHA RentCafe Portal" button and register. Currently, applications are open for Affordable Housing and Veterans." Public Housing and site based Wait Lists OPEN Effective 06/21/2022 Until 09/20/2022

The applicant was informed how to apply.  
Visit the Housing Authority's website [https://www.snrha.org/fh\\_howtoapply.html](https://www.snrha.org/fh_howtoapply.html).  
Find the "SNVRHA RentCafe Portal" button and register.  
Currently, applications are open for Affordable Housing and Veterans.  
Public Housing and site based Wait Lists OPEN Effective 06/21/2022 Until 09/20/2022

If you do not have Internet access, you can pick up an application at 5390 E Flamingo Road, Las Vegas, Nevada 89122.

Applicants may call (702) 477-3100 option 2 or our TTY number for the hearing impaired at (702) 387-1898 for further information or assistance completing your application.

Save and Send Email

- In our system settings, we can set up the Instructions we want the caller to receive by SMS in the Instructions field.
- The message can be sent by SMS or email by selecting it in the box below the Instructions field.

### Change Call Action

Name\*

Call to apply (Instructions)

Category

Call to apply

Text

The applicant was informed how to apply.  
Visit the Housing Authority's website [https://www.snrha.org/fh\\_howtoapply.html](https://www.snrha.org/fh_howtoapply.html).  
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Applicants may call (702) 477-3100 option 2 or our TTY number for the hearing impaired at (702) 387-1898 for further information or assistance completing your application.

Check the link for Public Notice <https://www.snrha.org/docs/SNRHA-Public-Notice-6mo-Application-Processing.pdf>

Notify instruction to caller email

Notify instruction to caller text

Save



Instruction

Thank you for calling SNVRHA.  
To apply, visit the Housing Authority's website [https://www.snrha.org/fh\\_howtoapply.html](https://www.snrha.org/fh_howtoapply.html).  
Find the "SNVRHA RentCafe Portal" button and register.  
Currently, applications are open for Affordable Housing and Veterans.  
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If you do not have Internet access, you can pick up an application at 5390 E Flamingo Road, Las Vegas, Nevada 89122.

Applicants may call (702) 477-3100 option 2 or our TTY number for the hearing impaired at (702) 387-1898 for further information or assistance complete application.

Check the link for Public Notice <https://www.snrha.org/docs/SNRHA-Public-Notice-6mo-Application-Processing.pdf>

Thank you.

Notify instruction to caller email

Notify instruction to caller text

- Once the message is sent, we receive the confirmation that the SMS was sent successfully to the number provided by the caller.

## Call Records

Web Action - No emails sent out for this call record

Email sent to:

Text with instructions sent to: 9543616280

- The Instructions are received on the mobile phone and contain hyperlinks to important information the caller needs to understand in this case:
  1. how to apply online
  2. Information about DBHAt waitlists are currently open
  3. Where the applicant can get a hard copy of the application

4. A link to a public notice uploaded to the agency’s website, with additional information about the current situation of delay in application processing due to a high volume of applications received.
- Below is a screenshot of the SMS received on the mobile phone.



(954) 289-9128

SNVRHA1 - Instructions

To apply, visit the Housing Authority’s website [https://www.snvrha.org/fh\\_howtoapply.html](https://www.snvrha.org/fh_howtoapply.html).

Find the “SNVRHA RentCafe Portal” button and register.

Currently, applications are open for Affordable Housing and Veterans.

Public Housing and site based Wait Lists OPEN Effective 06/21/2022 Until 09/20/2022

If you do not have Internet access, you can pick up an application at 5390 E Flamingo Road, Las Vegas, Nevada 89122.

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Check the link for Public Notice <https://www.snvrha.org/docs/SNRHA-Public-Notice-6mo-Application-Processing.pdf>

Thank you.

***Project Approach:***

**HCV/PH Reception Services:**

The implementation of the Call Center for Reception Service will be as follows. If we are awarded a purchase order, then we will provide a more detailed plan including a communication plan.

1. Implementing the Reception Services with integration to the Gilson Reception Call Center (GRCC) system. This process is straight forward and usually takes less than 30 days with the following steps that need to be accomplished:
  - a. Perform an onsite visit or multiple RingCentral Meetings to review the current process flow and information that caseworkers require. This would include review of application & re-certification process, HAP payments and inspections. From this visit or Go To Meetings, we will provide JHA with a Standard Operating Procedures Guide for review and approval.
  - b. Obtain a download from PIC or the Housing Authority of the PIC files or Ad Hoc report with Authority property structure and head of household information or from our ***Standard Excel Spreadsheet***.
  - c. Set-up all staff/case workers in our GRCC/Phone system and assign them to their tenant assignments. This will include their cell phone numbers and email addresses.
  - d. Obtain a listing of existing caseworker appointments. Review assignments and calendar with Housing management and provide tentative caseworker appointments based on next certification period.
  - e. Set-up the re-certification appointment letters in the system, if applicable.
  - f. Work with IT Staff to provide links to the Gilson Software iReception and Web Landlord Partner Systems, if applicable.
  - g. Set-up all HQS Inspectors in our GRCC system and assign them to their zip codes, if applicable. This will include their cell phone numbers and email addresses; in case a CSR needs to find out the location of an inspector.
  - h. Set up inspection time frames, finding types, and inspection types and review specific rules that need to be updated in the GRCC and/or HQS system.
  - i. GRCC supervisors will review the JHA Housing Management system and obtain familiar with



their programs (including differences in the programs), wait lists and preferences, and other information and they will perform training to all GRCC CSRs related to this information to streamline the operation and reduce the learning curve.

2. Provide JHA with the appropriate roll over phone numbers and (800) number. Additionally, provide JHA with the specific emergency number that bypasses the phone system for JHA Management and Caseworker and other emergency related calls.
3. Have all functions tested the GRCC Reception Services and Go Live.



### *A. Call Center-Reception Service Functions*

As is stated in the Executive Summary, Gilson Software was the first and only Affordable Housing Software Vendor to create a Property Management Call Center only for Housing Authorities. We have been adding at least two new Housing Authority Clients per month and we performed the following:

What we have done that is unique is to enhanced our Housing Management Software System to integrate into our purchased Answering Service Software System,

Additionally, we

- Ensure that our PMCC service is bi-lingual (English/Spanish) by hiring and testing all CSRs in both languages
- Applicants, Tenants or other HA Clients are assisted by highly knowledgeable, bi-lingual Call Center staff members who are able to give proper instructions based on HA provided information.
- Call Center CSRs provide applicants with updated Wait List status information, plus information related to the HA's programs and/or Properties.
- Tenants are provided with information related to their re-certifications or inspections, they can change their interview or inspection dates and obtain information related to their rental or account balances.
- The iReception Software automatically emails HA Staff of changes made by the Call Center staff based on applicant and tenant assignments.
- HA Staff notifies Call Center staff of times when they are busy or "Do Not Disturb Time" and Call Center staff will take recorded voice mails and email to HA Staff phone.
- We now include as an option to this service the capability of adding our iReception Software App are installed on Kiosks in the HA Lobby and provided on the HA Web Site to streamline the process and provide Applicants, Tenants and Other HA Clients with 24/7 access to information.
- Contracted with both AT&T Relay Services ([http://relayservices.att.com/content/2/tty\\_relay\\_2.html](http://relayservices.att.com/content/2/tty_relay_2.html)) for TTY services for the Housing Authority hearing impaired population.
- We also contracted with Sorenson Communications that provides world-class communications products and services that break down communication barriers between deaf, hard-of-hearing, and hearing individuals. Sorenson Communications offers the highest-quality video interpreting service, Sorenson Video Relay Service<sup>®</sup> (SVRS<sup>®</sup>), and the Sorenson ntouch<sup>®</sup> suite of products (ntouch<sup>®</sup> VP



videophone, ntouch<sup>®</sup> PC, ntouch<sup>®</sup> for Mac<sup>®</sup>, ntouch<sup>®</sup> Tablet, and ntouch<sup>®</sup> Mobile). All the Authority has to do is let us know how you would like us to market this service to your tenants and we will work with the Authority in doing so.

- Developed an CSR Training Program to provide CSRs with knowledge of the Housing Authority operations.
- In conjunction with this training program, we formed a partnership with the Hialeah and Palm Beach County Housing Authorities and all CSRs visit one of these Authorities for a tour of their operation/facility.
- In our Call Center Operations area we have added two 27” Monitors with the National Weather Service and News so that we can provide the CSRs with up to date weather forecast, temperatures & local news so that the supervisors can better manage staffing levels.
- Twice per year we perform an independent survey of the performance of the Property Management Call Center. ***We will hire either a Section 3 Firm associated with JHA or hire contractors that are JHA tenants to perform this service.*** The results of the survey will be presented to DBHA management for review. We will utilize the results of the surveys to improve the service of PMCC. There is no additional cost to perform this survey service.
- All of these changes have provided us with a Niche Service to the Housing Authority market.

# Reception Call Center

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Gilson Software Solutions' Reception Call Center (RCC) is absolutely essential in providing constant attention to all HA Client requests. Gilson specializes in a wide variety of software specifically designed for property management, so you can rest assured that your Authority is in good hands.

## Reception Call Center:

- Applicants, Tenants or other HA Clients are assisted by highly knowledgeable, bi-lingual Call Center staff members who are able to give proper instructions based on HA provided information.
- Call Center CSRs provide applicants with updated Wait List status information, plus information related to the HA's programs and/or Properties.
- Tenants are provided with information related to their re-certifications or inspections, can change their interview or inspection dates and obtain information related to their rental or account balances.
- The iReception Software automatically emails HA Staff of changes made by the Call Center staff based on applicant and tenant assignments.
- HA Staff notifies Call Center staff of times when they are busy or "Do Not Disturb Time" and Call Center staff will take recorded voice mails and email to HA Staff phone.

## iReception Compatibility:

- iReception Software App are installed on Kiosks in the HA Lobby and provided on the HA Web Site to streamline the process and provide Applicants, Tenants and Other HA Clients with 24/7 access to information.



## **F. *Quality Control:***

### **QC Department**

Gilson Call Center Services developed our Quality Control Department in 2016. Sandra Altesor is the Manager of Training and Quality Control and has 2 Customer Service Representatives that report to her.

On a daily basis, Ms. Sandra Altesor and her staff will perform audits of a predetermined percentage of calls that are received for JHA and all Clients to ensure that all calls are being handled properly.

They are auditing:

1. Recording of Customer Service Representatives
2. Data entry of call into our in-house GCCM System ensuring accuracy
3. Timing of call into GCCM and Client System
4. Review of selection of job by Customer Service Representatives
5. Data entry of call into Client System ensuring accuracy, if applicable
6. Data entry of completed call into Client System ensuring accuracy, if applicable
7. Total time processing call

If they discover any inconsistencies, they will then counsel with the CSR to ensure these issues are resolved for the future.

Finally, Sandra will work with the Supervisor if retraining is necessary or disciplinary action is required. Sandra is also responsible to produce daily management reports for the President and Director of the Call Center that provides with the analysis associated with Key Performance Indicators per Client and CSR such as wait time, hold time, abandon calls, handle time, etc From this analysis, management makes the decisions related to staffing



## G. Emergency Contingency Plan

Gilson Software and Call Center Services developed a Disaster Recovery Plan over 10 years ago and as a result, we have gone thru numerous hurricanes and we have never experienced any downtime. Listed below are the four steps of our Disaster Recovery Plan.

2. Offsite Co-Location: All of our servers are located at Atlantic.Net which is a third party co-location site. <https://www.atlantic.net> This service is HIPAA Compliant which complies with the two Gilson Call Center Healthcare Clients. Additionally, the service is guaranteed never to go down.

We have our phone system located at Atlantic.net so that this system will also not go down. We have an additional phone system set-up there that is set-up in redundancy mode in case the main system ever goes down. Finally, these systems are also backed up to the Cloud via a service with the phone equipment company.

Atlantic.Net HIPAA Web Server Hosting offers ultra-fast data processing speeds, HIPAA-compliant web hosting features and minimal risk of data crashes. The fast loading speeds of the highly available servers come with security safeguards, high performance, and guaranteed reliability.

HIPAA Compliant Hosting by Atlantic.Net™ is [SSAE 18, SOC 1, SOC 2 certified, HIPAA and HITECH audited](#), designed to secure and protect critical healthcare data, and electronic protected health information (ePHI) and records. Our HIPAA Hosting Solutions have been audited by a [qualified independent third party auditing firm](#), demonstrating our commitment to providing the best IT security and top-notch compliance solutions. Whether you're looking for a comprehensive managed hosting solution for your HIPAA servers or an unmanaged hosting service, we can assist you with all your HIPAA compliance hosting needs. Our high-performance [Website](#), [Database](#) and [Storage](#) servers are available in both [Dedicated](#) and [Cloud](#) environments and backed by our 100% uptime guarantee.

Below is an eight-part checklist of HIPAA Compliant Hosting requirements and Atlantic.Net provides all these components to help deliver a HIPAA Compliant Server Hosting Solution:

[Firewall](#)

[Encrypted VPN](#)

[Offsite backups](#)

[Multifactor authentication](#)

[Private hosted environment](#)

[SSL certificates](#)

[SSAE 18 certification](#)

[Business associate agreement \(BAA\)](#)



- 3. Multiple Office locations provides us the ability to move our Client calls to other offices in case one office loses power. We currently have 30 CSRs including supervisors in seven locations. We have set-up these offices to accommodate additional staff incase of a power failure or other issues at an office as shown below:

	Regular Total PHA <u>Operators</u>	Max Number of Operators <u>Per Location</u>
Fort Lauderdale, Florida	31	35
Miami, Florida	12	30
Minneola, Florida (Orlando)	3	6
Providence, Rhode Island	2	4
Salem, Massachusetts	2	4
Other Home Offices	<u>60</u>	<u>Unlimited</u>
Total Staff	120	Unlimited

We have set-up these offices with the appropriate equipment including computers and phones plus the appropriate internet set-up to be able to handle additional staff, if needed. As an example, in 2017 when Hurricane Irma hit Florida, we moved additional staff to Providence, RI and Minneola, Florida and added staff in Miami. Our systems remained operational.

We also perform tests twice per year to ensure that we are ready for any downtime.

- 4. Dual Internet providers: For all our main sites we have dual Internet Providers incase one provider goes down. As an example in our Fort Lauderdale Office we have both Comcast and AT&T. Also, our Comcast Service is set-up with power back-up from Comcast.
- 5. Back-up Service: At Atlantic.net we have a back-up service to ensure that all data is backed up daily so we will not lose data during an equipment or power outage.

## **Managerial Capacity**

### *c. Management Team:*

The Gilson Software management team has been dedicated to developing software products and services and Service management team prides itself in forming partnerships with its clients in order to develop the kind of software that is able to renovate their operations.

### **Matt Gilson:**

Matt Gilson graduated from Syracuse University with a degree in Accounting in 1979. He then worked in Fortune 500 Companies for fourteen years working to CFO of a World Wide Shipping Company. In 1993, Matt started his dream as an entrepreneur as a partner in Application Oriented Designs (AOD) in Miami, Fl., a software firm that specialized in products for Housing Finance Agencies (HFA's). As a partner, Matt in five years developed a team (32 staff) and increased revenue and profits five times through the development and marketing of the first Low Income Housing Tax Credit software product in the industry. In 1998, AOD was then sold to Yardi Software, a public housing software vendor wanting an entryway to the HFA market.

In 1998, Matt started Housing and Development Software (HDS) that also specialized in software for Housing Finance Agencies. Matt developed an excellent technical team (52 staff) and they became the leading software firm in the industry. They produced a Section 8 Project Based product for Contract Administrators and obtained over 80% market share with this product. Matt and his team also developed innovative products for Low Income Housing Tax Credits, Grant Management for HOME, CDBG, HOPWA, ESG and other funding sources and the first web based Single Family Management System for HFA Programs. Matt was required to sell HDS in 2008 for personal reasons.

In 2008, Matt started Gilson Software and purchased a small Public Housing software firm with a DOS based software package and 80 housing authority clients. In less than two years Matt developed a technical and customer support team and developed PHA Partner, which is a Window Based System. Due to the competition in this marketplace Matt developed a strategy to specialize in Mobile and Voice Technologies and to become the most innovative software firm in the market place.

The first step was to develop a technical staff with these skills and during this time developed the first Mobile HQS inspection software utilizing Windows Mobile. The team moved forward with Mobile Work Order and launched these products within a few existing clients. During this development process it was determined that a better platform for these products would be on an iPhone and iPad and thus the direction was changed and within 6 months completed these enhancements. At the same time the Team developed Interactive Voice Response system and enhanced all the mobile systems to include voice recognition.

At the same time, we also developed an Interactive Voice Response (IVR) application that would provide the capability for tenants to call a specific number and via a voice attendant create work orders that can be created and synchronized to the iWork Order App.

During these installations a general theme continued to come up from Housing Authority staff 1.) They wanted to have their tenants talk to a live person, 2.) They wanted to reduce the amount of time



performing data entry into their systems thus improving their productivity and 3.) Their current answering service did not understand the Affordable Housing business and handled many other businesses and they could not provide the quality that they desire.

As a result, the Gilson Software-Maintenance Call Center Department was formed to ensure that this service could be accomplished and the above goals could be met.

Matt Gilson has developed teams that adapted its operation to support its client base, and changed the way traditional software vendors operated in the industry. Matt Gilson was the first software provider in the affordable housing market to recognize the need for more structured implementation, business analysis and other services to assist agencies in the successful implementation of software solutions and services to improve their operations and make them more efficient.

The professionals that make up the Gilson Software Team are knowledgeable, assertive, and creative individuals who are focused on quality products and quality processes. The PHA Partner Systems provide users to benefit from the regulatory requirements that are ongoing. We believe in building and fostering relationships and partnerships.

Our mission:

*“Gilson Software will produce and maintain software and services that utilizes today’s technologies and is based on the needs and requirements of our clients. These software products and services will improve the staff’s effectiveness and make their jobs easier and more enjoyable.”*

Gilson Software will be focused on partnering with our clients in order to determine *best practices* for this industry, so that all of our clients can find the flexibility they need to make our systems work for their authority’s processes. These enhancements will be included to our clients at no cost.

d. Organization

Based on our current staffing levels, we would ensure that if we receive the contract/PO with JHA that we would over staff during the first few weeks as we analyze the call volume, even though we are currently handling the JHA call volumes.

Prior to starting and after we have JHA either a visit to JHA or Conference Calls we would perform additional training sessions to all operators and more intense training for Public Housing Specialists related to DBHA.

Even though all Customer Service Representatives (CSR’s) can answer and have been trained in Public Housing, we will have Sixty-five (65) specialists for JHA calls during the commencement of the service. These CSR’s will then spend additional training time with all other CSR’s during the second month of service.

Ms. Marilyn Tomas would be the Director that would lead Ismael Sancez CSR-Trainer to perform the training and hiring if necessary and be responsible to communicate implementation status with JHA during this process.

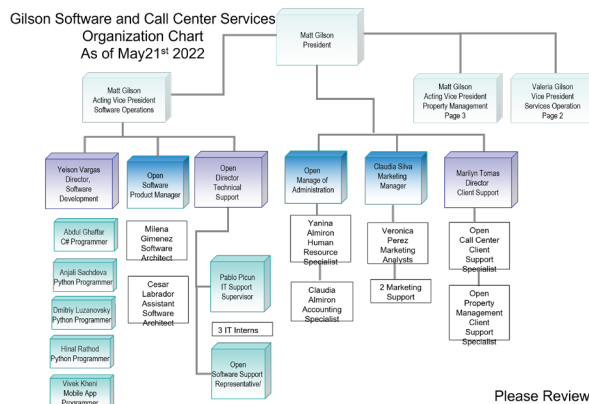
For the first three months, on a weekly basis or until JHA staff require, Ms. Tomas would perform a weekly conference call with JHA staff to obtain an update on the implementation process and handle any issues that arise during this time.

Additionally, our Training and Implementation Departments develop a training video specifically related to information related to the Allegheny County Housing Authority including basic information about the City, weather and specific interests, information about the Housing Authority related number units, housing type, goals and objectives, etc. Finally, the video covers information related to the JHA Yardi System and how it is set-up for data entry, if applicable. Please review a sample

Daily, Ms. Maggie Acevedo and the QC Department, Ms. Betty Covolo, and Ms. Olivia Tomas would perform an audit of all calls that are received for JHA to ensure that all calls are being handled properly and entered in to the JHA Work Order System accurately, if applicable. If they discover any inconsistencies, they will then counsel with the CSR to ensure these issues are resolved for the future.

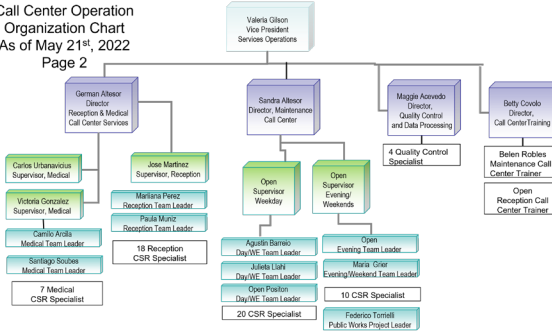
During the weekly implementation meetings with DBHA, if Ms. Tomas believes it is necessary, she will include, Ms. Valeria Gilson, Director Call Center Operations and/or Matt Gilson, President.

Listed below is the organization chart for Gilson Software. The Call Center operation is the fastest growing and because of the number of operators we are only listing a count of the staff since their shifts change rapidly.

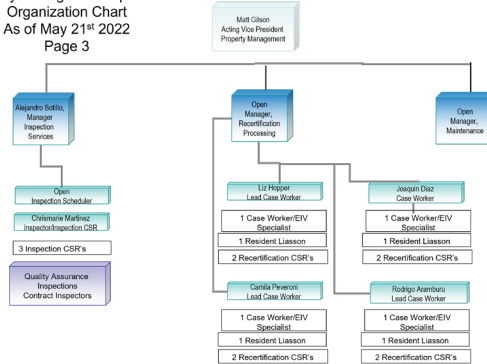


Please Review  
Operations  
Organization on  
Page 2 & 3

Call Center Operation  
Organization Chart  
As of May 21st, 2022  
Page 2



Property Management Operation  
Organization Chart  
As of May 21st, 2022  
Page 3





## EQUAL EMPLOYMENT OPPORTUNITY (EEO)

Gilson Software Solutions (CONTRACTOR) is an equal opportunity employer and, during the performance of this contract, the CONTRACTOR agrees to abide by the equal opportunity goals of the HOUSING AUTHORITY OF THE CITY OF ALAMEDA as follows:

1. The CONTRACTOR will not discriminate against any employee or applicant for employment because of race, color, religion, sex, national origin, or handicap. The CONTRACTOR will take affirmative action to ensure that applicants are employed and that employees are treated during employment without regard to their race, color, religion, sex, national origin, or handicap. Such action shall include, but not be limited to, the following: employment, upgrade, demotion, or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. The CONTRACTOR agrees to post in conspicuous places, available to employees and applicants for employment, notices to be provided by the HOUSING AUTHORITY OF THE CITY OF ALAMEDA setting forth the provisions of this nondiscrimination clause.
2. The CONTRACTOR will, in all solicitations or advertisements for employees placed by or on behalf of the CONTRACTOR, state that all qualified applicants will receive consideration for employment without regard to race, color, religion, sex, or national origin.
3. The CONTRACTOR will comply with all provisions of Executive Order 11246 and of the rules, regulations, and relevant orders of the Secretary of Labor.
4. The CONTRACTOR will furnish all information and reports required by Executive Order 11246 and by the rules, regulations, and orders of the Secretary of Labor, or pursuant thereto, and will permit access to his books, records, and accounts by the Department of Housing and Urban Development (HUD) and the Secretary of Labor for purposes of investigation to ascertain compliance with such rules, regulations, and orders.
5. In the event of the CONTRACTOR'S noncompliance with the nondiscrimination clauses of this contract or with any of such rules, regulations, or orders, this contract may be canceled, terminated or suspended in whole or in part and the CONTRACTOR may be declared ineligible for further Government contracts in accordance with procedures authorized in Executive Order 11246 and such other sanctions may be imposed and remedies invoked as provided in Executive Order 11246 or by rule, regulation, or order of the Secretary of Labor, or as otherwise provided by law.

Matt Gilson, President

*(Signature/Title)*

Gilson Software Solutions

*(Company)*

11/26/2021

*(Date)*

# **EXHIBIT B**

## **Email Correspondence with Gilson Housing Partners Regarding Proposal**



**From:** [Matt Gilson](#)  
**To:** [Weathers, Diarra](#)  
**Cc:** [German Altesor](#)  
**Subject:** Re: Gilson Call Management Services  
**Date:** Wednesday, June 26, 2024 3:15:40 PM  
**Attachments:** [image001.png](#)  
[image002.png](#)  
[image003.png](#)  
[image004.png](#)  
[image005.png](#)  
[image006.png](#)  
[image007.png](#)  
[image008.png](#)  
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[image019.png](#)  
[image020.png](#)  
[image021.png](#)  
[Outlook-rlaclhq.png](#)  
[Outlook-Decorative.png](#)  
[Outlook-Jacksonvil.png](#)  
[Outlook-Jax Urban .png](#)  
[Outlook-signature .png](#)  
[Outlook-Decorative.png](#)  
[Outlook-val0evrp.png](#)

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You don't often get email from matt@gilsonsoftware.com. [Learn why this is important](#)

Diarra:

There are no recent amendments to the Houston Housing Authority (HHA) contract.

The proposals submitted to both Jacksonville Housing Authority (JHA) and Houston Housing Authority (HHA) are based on our list price. The only difference is the volume of calls. HHA call volume is based on 16,000 calls or 48,000 minutes per month and JHA is based on Public Housing 1,050 Calls or 3,150 minutes per month and Housing Choice Voucher is based on 5,162 calls or 15,486 minutes per month.

Our list price is based on the following volume levels and rates:

Volume	Rate Per Minute
0-4,000	\$.70
4,001 to 8,000	\$.65
8,001 to 16,000	\$.60
16,001 to 24,000	\$.55
24,001 to Plus	\$.50

So based on our price list HHA's rate is \$.50 per minute and JHA's rate will be

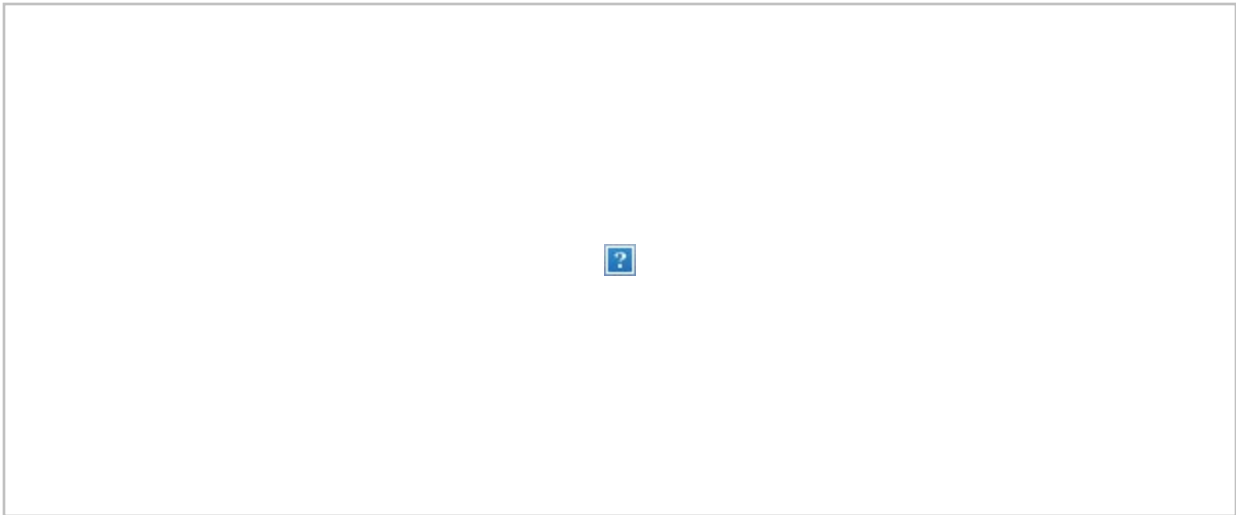
\$.70 and \$.60, respectively.

The Price List is included in the contract and as a result will contain the same language. All other aspects of the contract are identical.

Please let me know if you have any questions.

Thanks Very Much,

Matt



---

**From:** Weathers, Diarra <dweathers@jaxha.org>

**Sent:** Wednesday, June 26, 2024 2:37 PM

**To:** Matt Gilson <matt@gilsonsoftware.com>

**Cc:** Austin Crotts <ACrotts@housingforhouston.com>; LaKeshia <LJackson@housingforhouston.com>; German Altesor <german.altesor@gilsonhousingpartners.com>; Marilyn Tomas <Marilyn@gilsonhousingpartners.com>

**Subject:** Re: Gilson Call Management Services

Good Afternoon Team,

Thank you everyone for your assistance with helping us at JHA craft an agreement that ultimately will put us in a position to provide better call center service .

JHA is in the process of preparing the interlocal "piggyback" agreement documentation.

If possible I would like to request any recent amendments to the current agreement, any ICE

information, or other miscellaneous documentation relative to the price and scope of work in order to complete the interlocal agreement. Per the attached email I believe the confirmation sent by Gilson on 6/21 should prove sufficient.

If there are any questions please don't hesitate to contact me, again thanks to everyone for your assistance in this matter.

**Diarra Weathers**  
Procurement Supervisor



[JaxHA.org](http://JaxHA.org)



**P 904-366-6078**

**C 904-219-6385**

1300 Broad Street N  
Jacksonville, FL 32202

---

**From:** Matt Gilson <matt@gilsonsoftware.com>

**Sent:** Friday, June 21, 2024 3:56 PM

**To:** Weathers, Diarra <dweathers@jaxha.org>

**Cc:** Austin Crofts <ACrofts@housingforhouston.com>; LaKeshia <LJackson@housingforhouston.com>; German Altesor <german.altesor@gilsonhousingpartners.com>; Marilyn Tomas <Marilyn@gilsonhousingpartners.com>

**Subject:** Gilson Call Management Services

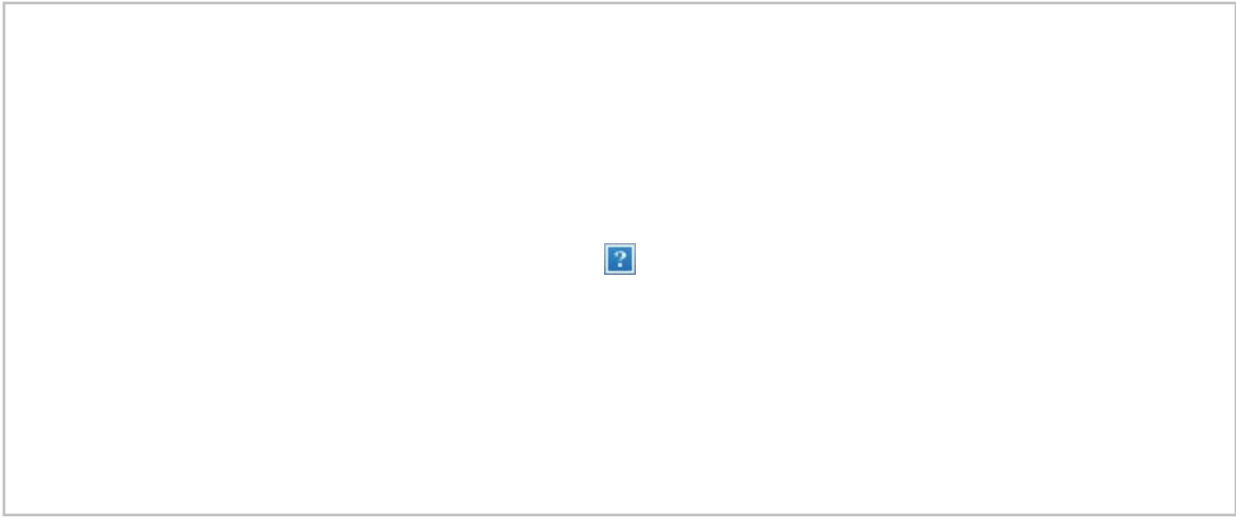
You don't often get email from matt@gilsonsoftware.com. [Learn why this is important](#)

**Diarra:**

I am in agreement for the Jacksonville Housing Authority to piggyback off the Houston Housing Authority contract including the terms and per minute price. Should you require any specific documents that require my signature, please forward and I will be pleased to expediate.

Thanks Very Much,

Matt



---

**From:** Weathers, Diarra <dweathers@jaxha.org>

**Sent:** Tuesday, June 18, 2024 3:18 PM

**To:** Austin Crotts <ACrotts@housingforhouston.com>; Jackson, LaKeshia  
<LJackson@housingforhouston.com>

**Cc:** German Altesor <german.altesor@gilsonhousingpartners.com>; Marilyn Tomas  
<Marilyn@gilsonhousingpartners.com>

**Subject:** Re: [External Email] Re: Gilson Call Management Services

Good afternoon,

Understood no problem there.

I am looping in the Gilson representative(s) on this correspondence as well to ensure uniformity and transparency.

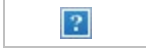
Gilson Team: Can you please provide confirmation of your agreement to piggyback the HHA agreement for JHA?

Thank you.

**Diarra Weathers**  
Procurement Supervisor



[JaxHA.org](http://JaxHA.org)



**P 904-366-6078**

**C 904-219-6385**

1300 Broad Street N  
Jacksonville, FL 32202

---

**From:** Crotts, Austin <[ACrotts@housingforhouston.com](mailto:ACrotts@housingforhouston.com)>

**Sent:** Tuesday, June 18, 2024 3:09 PM

**To:** Weathers, Diarra <[dweathers@jaxha.org](mailto:dweathers@jaxha.org)>; Jackson, LaKeshia  
<[LJackson@housingforhouston.com](mailto:LJackson@housingforhouston.com)>

**Subject:** RE: [External Email] Re: Gilson Call Management Services

Diarra,

I don't think our agreement is structured in such a way that it would not allow you to piggyback. Please note that we are halfway through year 2 of 5, with the contract expiration in December of 2027, if we exercise the option for the additional 2 years. As LaKeshia mentioned, we would need to do an Interlocal Agreement and I would need something in writing from Gilson that they agree with you piggybacking off our contract and pricing. Once that is completed I can provide access to our procurement file for those services which would include the following:

- Solicitation
- Amendments issued
- Committee CNDA Forms
- Score Sheets
- Consolidated Score Sheets
- ICE
- Witness Statement
- Gilson Response
- Proof of Advertisement
- Board Resolution
- Legal Standing
- Bidder List

I think that should be everything you will need for your file, but if there is anything else you can let me know.

Regards,

**Austin Crofts, Procurement Manager**

Houston Housing Authority  
2640 Fountain View Drive, Room 1075  
Houston, Texas 77057  
Office: 713-260-0554  
Fax: 713-260-0556

Email: [acrofts@housingforhouston.com](mailto:acrofts@housingforhouston.com)



***Our Mission: To improve lives by providing quality, affordable housing options and promoting education & economic self-sufficiency.***

**Please note: The HHA lobby will close at 2:00 PM on the second Wednesday of each month.** The adjusted schedule is necessary to facilitate professional development training for our dedicated staff members. You may still call our customer service line at (713) 260-0500 or email [info@housingforhouston.com](mailto:info@housingforhouston.com) with your questions or concerns. Our dedicated customer service team will be available via phone during regular business hours to provide support. Thank you for your patience and understanding as we work to provide quality support and services.

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---

**From:** Weathers, Diarra <[dweathers@jaxha.org](mailto:dweathers@jaxha.org)>  
**Sent:** Tuesday, June 18, 2024 2:04 PM  
**To:** Jackson, LaKeshia <[LJackson@housingforhouston.com](mailto:LJackson@housingforhouston.com)>  
**Cc:** Crofts, Austin <[ACrofts@housingforhouston.com](mailto:ACrofts@housingforhouston.com)>  
**Subject:** [External Email] Re: Gilson Call Management Services

**CAUTION:** This email originated from outside the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Thank you!

**Diarra Weathers**  
Procurement Supervisor



**JaxHA.org**



**P 904-366-6078**

**C 904-219-6385**

1300 Broad Street N  
Jacksonville, FL 32202

---

**From:** Jackson, LaKeshia <[LJackson@housingforhouston.com](mailto:LJackson@housingforhouston.com)>

**Sent:** Tuesday, June 18, 2024 3:01 PM

**To:** Weathers, Diarra <[dweathers@jaxha.org](mailto:dweathers@jaxha.org)>

**Cc:** Crofts, Austin <[ACrofts@housingforhouston.com](mailto:ACrofts@housingforhouston.com)>

**Subject:** Re: Gilson Call Management Services

You don't often get email from [LJackson@housingforhouston.com](mailto:LJackson@housingforhouston.com). [Learn why this is important](#)

Thank for the clarification. We will gather the procurement file and will provide it to you once completed. We will also have to enter into an interlocal agreement with JHA as well. I've included our Procurement Manager, Austin Crofts on the email as well in case there is something I missed.

**LaKeshia V. Jackson**

**Attorney**

**Houston Housing Authority**

**2640 Fountain View Drive, Suite 409**

**Houston, Texas 77057**

**P: 713.260.0338**

**F: 713.260.0573**

**Email: [LJackson@housingforhouston.com](mailto:LJackson@housingforhouston.com)**

**[www.houstonforhouston.com](http://www.houstonforhouston.com)**

**Please note: Beginning in July, the HHA lobby will close at 2:00 PM on the second Wednesday of each month.** The adjusted schedule is necessary to facilitate professional development training for our dedicated staff members. You may still call our customer service line at (713) 260-0500 or email [info@housingforhouston.com](mailto:info@housingforhouston.com) with your questions or concerns. Our dedicated customer service team will be available via phone during regular business hours to provide support. Thank you for your patience and understanding as we work to provide quality support and services.



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---

**From:** Weathers, Diarra <[dweathers@jaxha.org](mailto:dweathers@jaxha.org)>  
**Sent:** Tuesday, June 18, 2024 1:56 PM  
**To:** Jackson, LaKeshia <[LJackson@housingforhouston.com](mailto:LJackson@housingforhouston.com)>  
**Cc:** Crofts, Austin <[ACrofts@housingforhouston.com](mailto:ACrofts@housingforhouston.com)>  
**Subject:** [External Email] Re: Gilson Call Management Services

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Option 1 is to piggyback if possible.

If your agreement with Gilson is structured in a way that doesn't allow for a piggyback then at least we have reference to utilize for a full solicitation for the agency.

**Diarra Weathers**  
Procurement Supervisor



**JaxHA.org**



**P 904-366-6078**

**C 904-219-6385**

1300 Broad Street N  
Jacksonville, FL 32202

---

**From:** Jackson, LaKeshia <[LJackson@housingforhouston.com](mailto:LJackson@housingforhouston.com)>  
**Sent:** Tuesday, June 18, 2024 2:50 PM  
**To:** Weathers, Diarra <[dweathers@jaxha.org](mailto:dweathers@jaxha.org)>  
**Cc:** Crofts, Austin <[ACrofts@housingforhouston.com](mailto:ACrofts@housingforhouston.com)>



**Subject:** Gilson Call Management Services

You don't often get email from [ljackson@housingforhouston.com](mailto:ljackson@housingforhouston.com). [Learn why this is important](#)

Good Afternoon Mr. Weathers,

For clarification, is JHA looking to piggyback off of our contract with Gilson Call Management Services or simply use the contract as a reference when preparing your own contract with them?

Thanks,

**LaKeshia V. Jackson**

**Attorney**

**Houston Housing Authority**

**2640 Fountain View Drive, Suite 409**

**Houston, Texas 77057**

**P: 713.260.0338**

**F: 713.260.0573**

**Email: [LJackson@housingforhouston.com](mailto:LJackson@housingforhouston.com)**

**[www.houstonforhouston.com](http://www.houstonforhouston.com)**

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# EXHIBIT C

## Piggyback Agreement with Gilson Housing Partners



## Justification for “Piggy-back” C24-019 Gilson Housing Partners

Within Section 14.2.B.5 of HUD Procurement Handbook 7460.8 REV 2 it states that a Housing Agency (HA) may purchase “supplies and services through a local, county or State government’s supply, service or equipment contractor.” This practice is also encouraged and allowed by 24 CFR 200 (b)(e). The Jacksonville Housing Authority (JHA) is electing “piggy-back” on Contract 22-35 with the Houston Housing Authority for Call Center management services.

Gilson Housing Partners will provide twelve months of service for a total estimated sum of \$193,356  
With a yearly renewal option not to exceed 4 years in total.

**This period will be from: August 1 2024 to August 1, 2025**

**SCOPE:**

Vendor will provide call center services and management. (Exhibit A) per previous inter-local agreement. (piggyback). Priced at \$0.50 per minute. Pricing schedule is listed in Exhibit B.

**COST/VALUE OF SERVICES:**

The current total Not-to-Exceed Value of this contract is:  
**(\$200,000)**

The JHA will not pay Contractor for any unapproved tasks. The Contractor exceeds the NTE amount at his/her own risk. The Contractor is under no obligation to provide services that would cause the Contractor’s fees to exceed the NTE amount without prior revision of this amount by written change order.

To receive payment for services rendered pursuant to this contract a fully completed invoice must be received for processing. The invoice must include a unique invoice number, JHA contract number, and a description of the services rendered including location.

**CERTIFICATIONS:** The undersigned representative of each party hereby acknowledges by signature below that they have reviewed the foregoing and understand and agree to abide by their respective obligations as defined herein:

**Gilson Housing Partners**

DocuSigned by:  
*Matt Gilson* 7/24/2024  
By: \_\_\_\_\_ Date: \_\_\_\_\_  
12AB09241B21430...  
**Authorized Representative**

**Jacksonville Housing Authority**

By: \_\_\_\_\_ Date: \_\_\_\_\_  
**Vanessa Dunn, Acting President & CEO**

## Exhibit A



Fully Executed  
Contract 22-35 Call (

**CONTRACT NO. 22-35**

**FOR**

**CALL CENTER STAFFING AND MANAGEMENT**

**BETWEEN**

**GILSON SOFTWARE AND CALL CENTER SERVICES**

**AND**

**THE HOUSTON HOUSING AUTHORITY**

This contract (the "Contract")<sup>1</sup> is entered into by and between the HOUSTON HOUSING AUTHORITY (the "HHA"),<sup>2</sup> having its principal place of business at 2640 Fountain View, Houston, Texas 77057, and Gilson Software and Call Center Services (the "Contractor"), having its principal place of business at 1401 East Broward Boulevard, Suite 205 Fort Lauderdale, FL 33301. Hereinafter, all references to the "Parties" shall mean the HHA and the Contractor.

**WITNESSETH:**

WHEREAS, the HHA is a public body corporate entity duly organized and validly existing and in good standing under the laws of the State of Texas and currently engaged in business defined in the Local Government Code of the State of Texas, including the provision of decent, safe, and sanitary housing to the residents of its facilities, low-income families, the elderly, and the disabled;

WHEREAS, the HHA, or its affiliates or subsidiaries, owns certain multifamily housing developments ("Properties") and has an administrative office;

WHEREAS the HHA requires a contract for a firm to staff and manage a full-time Call Center to handle calls from HHA program participants, property owners, and other stake holders.

WHEREAS the HHA, on or about August 5, 2022, issued Request for Proposal No. 22-35 ("RFP 22-35"), including any amendments or addenda thereto, soliciting responses from qualified firms to contract for services to staff and manage a full-time Call Center to handle calls from HHA program participants, property owners, and other stake holders.

WHEREAS the HHA reviewed the responses it received to RFP 22-35, and determined that the response submitted by the Contractor was the most advantageous to the HHA; and

---

<sup>1</sup> The Contract may also be referred to interchangeably as the "Agreement."

<sup>2</sup> In addition to being referred to as the "HHA," the Houston Housing Authority may alternatively be referred to as the "Authority," the "Agency," the "PHA," the "Housing Authority," the "Local Authority," the "LHA," or the "HA."

NOW THEREFORE, in consideration of the promises of the Parties herein, and pursuant to the mutual covenants and terms and conditions set forth in this Contract, the HHA and the Contractor agree to be legally bound as follows:

## **1. The Contract Documents.**

- 1.1 In addition to the foregoing document, this Contract shall include: (a) Form 5370-C, as promulgated by the Department of Housing and Urban Development (“HUD”), and commonly known as “General Conditions for Non-Construction Contracts” (“Form 5370-C”); (b) RFP 22-35, including all exhibits, addenda, or amendments thereto; (c) Contractor’s Response to RFP 22-35, including all exhibits, addenda, or amendments thereto. Form 5370-C is attached hereto and incorporated by reference as if set forth fully herein. The parties agree to be bound by the terms of Form 5370-C and the contract documents as outlined herein.
- 1.2 Form 5370-C, RFP 22-35, and Contractor’s Response to RFP 22-35 are attached hereto as, respectively, Exhibit 1, Exhibit 2 and Exhibit 3 and are incorporated by reference as if set forth fully herein.
- 1.3 In the event of a conflict between or among the contract documents, the following order of priority shall apply: (a) Form 5370-C; (b) the foregoing document; (c) RFP 22-35, and (d) Contractor’s Response to RFP 22-35. The Section 3 Form and the M/WBE Form shall receive the lowest priority in the event of a conflict between or among the contract documents.
- 1.4 A Contract document’s silence on a provision, issue, or term and condition found in another Contract document shall not be considered a conflict between or among the Contract documents.

## **2. Contractor’s Services.**

- 2.1 The work/services<sup>3</sup> to be performed by the Contractor pursuant to this Contract shall include staffing and managing a full-time Call Center to handle calls from HHA program participants, property owners, and other stake holders. The Call Center will answer calls from residents, applicants, citizens, employees, landlords, vendors, and others, in addition to performing other related work/services outlined in Exhibit A (the Scope of Work as included in RFP 22-35).
- 2.2 The contractor shall be required to provide all the necessary personnel, supervision, transportation, equipment, insurance, tools, supplies, materials, and any other item(s) or resource(s) needed to perform the services that are the subject of this agreement.
- 2.3 Absent the HHA’s written consent or written instruction, the Work under this Contract shall be performed by Contractor.

---

<sup>3</sup> Hereinafter referred to interchangeably as “Work” or “Services”.

- 2.4 The HHA may designate a Project Manager during the period of performance.
- 2.5 Contractor agrees to conduct all activities and perform all Work under this Agreement in accordance with all applicable federal, state and local laws, rules, regulations, policies, procedures and issuances in effect or promulgated during the term of this Agreement.

### **3. Consideration and Payment.**

- 3.1 In consideration of the work to be performed by the Contractor in accordance with the requirements and Scope of Work previously referenced herein, the HHA shall pay the Contractor an amount not to exceed Three Hundred Thousand Dollars and Zero Cents (\$300,000.00) annually, during the Contract term.
- 3.2 Contractor shall receive payment after invoices have been submitted and work has been approved by HHA's Project Manager. Payment terms are net 30 days. Should Contractor receive payment by wire or electronic means, Contractor must provide HHA written confirmation and instructions signed by Contractor's duly authorized official before any type of electronic or wire payment will be made by HHA. Any changes to wire or electronic payment information must be submitted to HHA in writing and signed by Contractor's duly authorized official.
- 3.3 The Contractor will ensure that its work and services are provided in a cost-efficient manner.
- 3.4 By the twentieth day of a given month, the Contractor, with respect to the work and services provided under this Contract in the preceding month, shall provide the HHA with an invoice that includes: (a) an itemized list of the work and services performed, (b) who performed the work and services, (c) the Properties and amount at which the work and services was billed; (d) the amount of time spent on the work and services, measured in one-tenth of an hour increments, (3) costs incurred for reimbursable expenses, if any such expenses are reimbursable under this Contract. Invoices comporting with this section that are approved by the HHA shall be due and payable by the HHA no later than thirty days after receipt. Invoices may be sent by the Contractor to the HHA via the United States Postal Service or via email. If sent via email, an invoice shall be considered to be received by the HHA on the day the email was sent by the Contractor.
- 3.5 If the HHA does not approve of an invoice, or a part thereof, the HHA will, within seven business days after receipt of the invoice, provide the Contractor with written notice of adjustments that the HHA believes are warranted. If, within seven business days of receiving such notice from the HHA the Contractor does not present the HHA with additional detail or documentation to adequately support the disputed invoice (or portion thereof), then any adjustments made by the HHA to the invoice in question shall become binding upon the Contractor and the Contractor will waive any and all of

its rights to dispute the adjusted invoice. If the Contractor responds timely within the seven business day timeframe allotted herein, and provides sufficient detail to adequately support the disputed invoice, (or disputed portion thereof), then the HHA shall consider the Contractor's timely response and will not unreasonably withhold payment of the disputed amount, provided that the additional detail or documentation submitted by the Contractor sufficiently and adequately supports the disputed invoice (or disputed portion thereof).

- 3.6 The HHA shall pay only the Contractor under this Contract. The HHA shall have no liability, directly or indirectly, for payment to the Contractor's employees, workers, agents, contractors, or subcontractors, if any. The Contractor agrees to indemnify, hold harmless, and defend the HHA and its employees, agents, affiliates, subsidiaries, representatives, and board members from any and all such claims.
- 3.7 **The Contractor is solely responsible for the payment of wages and any applicable benefits to workers for work performed under this contract. The Contractor shall be responsible for withholding federal and state income taxes, paying Federal Social Security taxes, maintaining unemployment insurance and maintaining workers' compensation insurance, in an amount and under such terms as required by the applicable laws of the State of Texas. THE HHA'S PAYMENT IS TO THE CONTRACTOR. HHA SHALL HAVE NO LIABILITY, DIRECTLY OR INDIRECTLY, FOR PAYMENT TO THE CONTRACTOR'S WORKERS OR TO SUBCONTRACTORS. THE CONTRACTOR SHALL INDEMNIFY AND HOLD THE HHA, ITS EMPLOYEES, REPRESENTATIVES, AND AFFILIATES HARMLESS FROM ANY AND ALL SUCH CLAIMS.**
- 3.8 **The HHA is not responsible to the Contractor or the Contractor's workers for payment of any overtime compensation or any additional payments pursuant to the Fair Labor Standards Act; the Texas Pay Day Act; the Equal Pay Act; Title VII of the Civil Rights Act of 1964, 42 U.S.C 2000e, et al., as amended; or any provisions of the Texas Labor Code Ann., as amended. The HHA will not be responsible for overtime wages.**

#### **4. Term/Period of Performance, Effective Date, and Termination.**

- 4.1 This Contract shall have an initial term of three (3) years from the effective date. At its sole discretion, the HHA may elect to extend the period of performance for up to an additional two (2) years.
- 4.2 All work performed by the Contractor under the Contract shall be performed on a twenty-four (24) hour basis, seven (7) days per week. HHA reserves the right to change hours and days as necessary.
- 4.3 This Contract shall be signed by the HHA and the Contractor. The Contractor shall sign the Contract first, and after signing, shall deliver the original signed contract, along



with any and all required payment bonds, performance bonds, and required proof of insurance, to the HHA for signature by the HHA. This Contract shall not become effective until it is executed by the HHA. The Contract's effective date shall be the date of execution by the HHA.

- 4.4 Execution of the Contract by the Contractor is a representation that the Contractor has visited the work site, become generally familiar with local conditions under which the Contractor is to perform its work, and correlated personal observations with the requirements set forth in the Contract.
- 4.5 Passage of the Agreement expiration date shall not extinguish or prejudice HHA's right to enforce this Agreement with respect to default or defect in performance that has not been cured.
- 4.6 Irrespective of any default hereunder, HHA may at any time cancel the contract in whole or in part. Should this occur, the Contractor shall be entitled to equitable compensation for all work completed and accepted by HHA's Project Manager prior to such termination or cancellation.

## **5. Confidentiality.**

- 5.1 The Contractor acknowledges and agrees that all information which the Contractor shall receive from the HHA or its agents or affiliates in connection with this Contract shall be confidential and the Contractor shall not disclose such information to any party without the HHA's prior written consent or unless required to do so by law.

## **6. Contractor's Representations and Warranties.**

- 6.1 The Contractor represents and warrants that it has all applicable licenses and registrations to engage in and perform the services contemplated by this Contract. Unless otherwise stated herein, all local, State, or Federal permits or registrations which may be required to provide the services to be provided by the Contractor shall be the sole responsibility of the Contractor and any costs submitted by the Contractor in its Response shall reflect all costs required by the Contractor to procure and provide such necessary permits and registrations.
- 6.2 The Contractor represents and warrants that the Contractor presently has no interest and shall not acquire any interest, direct or indirect, which would conflict in any manner or degree or have the potential of conflicting with the performance of its services under the Contract or the impartial rendering of assistance or advice to the HHA. The Contractor further represents, covenants, and warrants that in the performance of the Contract no person having any such interest shall be employed. In the event the Contractor becomes aware of such an interest after the execution of this Contract, the Contractor shall immediately disclose the interest to the HHA in writing. The Contractor agrees that in carrying out its duties and responsibilities under this Agreement, it will neither undertake, nor cause, nor permit to be undertaken, any

activity which either (i) is illegal under any laws, decrees, rules, or regulations in effect in Texas or the United States; or (ii) would have the effect of causing the HHA to be in violation of any laws, decrees, rules, or regulations in effect in Texas or the United States.

- 6.3 Contractor agrees that in connection with this Agreement or any extension thereof, it will update the Conflict of Interest Questionnaire and any other relevant forms required by law, HUD or HHA, as needed. Contractor further agrees to notify the HHA immediately of any conflict of interest relating to the subject matter of this Agreement.
- 6.4 The Contractor represents and warrants that in performing its services under this Contract, it will comply with all applicable State of Texas laws and regulations pertaining to the provision of its services under this Contract and that the Contractor will perform its services in a good and workmanlike manner, with the same degree of skill, diligence, competency and knowledge which is ordinarily exhibited, possessed by and consistent with the professional standards that apply to the provision of such services in metropolitan areas of similar size to Houston, Texas and other professionals in good standing in the same or similar field as Contractor.

## 7. Insurance.

- 7.1 The Contractor shall maintain the following insurance for the duration of this Contract, unless otherwise noted:
- a. Workers' compensation insurance in accordance with State of Texas rules and regulations for all employees providing work and services hereunder. The policy must be endorsed to contain a waiver of subrogation and a thirty (30) day notice of cancellation or non-renewal in favor of the HHA.
  - b. Commercial general liability insurance with a single limit for bodily injury of \$1,000,000.00 per occurrence and property damage limit of no less than \$1,000,000.00 per occurrence. The insurance may have a combined aggregate of coverage amounting to no less than \$2,000,000.00. Such insurance shall cover the operations of the Contractor under this Contract and shall protect the Contractor and its officers, agents, and employees against claims of bodily injury or death, including specifically such claims resulting from any form of sexual misconduct and for property damage to others. Such insurance shall also include coverage for completed operations and contractual liability. If the Contractor has a "claims made policy," then the following additional requirements apply: (i) the policy must provide a "retroactive date" which must be on or before the date the Contractor executes this Contract; and (ii) the extended reporting period may not be less than five years following the completion date of this Contract. Regardless of whether the Contractor's policy is claims made or per occurrence, the HHA must be named as an additional insured and the policy must be endorsed to be primary/noncontributory and to contain a waiver of subrogation in favor of the

HHA. The policy must also be endorsed with a thirty (30) day notice of cancellation or non-renewal in favor of the HHA.

- c. Automobile liability insurance covering owned, non-owned, hired and all vehicles used by the Contractor or its officers, employees, or agents with a combined single limit of not less than \$1,000,000.00 applicable to bodily injury, sickness or death and loss of, or damage to, property in any one occurrence. The HHA must be named as an additional insured under this policy and this policy must be endorsed to be primary and to contain a waiver of subrogation in favor the HHA. The policy must also be endorsed with a thirty (30) day notice of cancellation or non-renewal in favor of the HHA.
- d. Umbrella/Excess Liability Insurance in the amount of \$4,000,000.00 providing excess limits over Workers' Compensation, Automobile Insurance, Professional Liability and General Liability Insurance. The HHA must be named as an additional insured and this policy must be endorsed to be primary/noncontributory and contain a waiver of subrogation endorsement in favor of the HHA. The policy must also be endorsed with a thirty (30) day notice of cancellation or non-renewal in favor of the HHA.
- e. Errors and omissions professional liability insurance in an amount no less than \$2,000,000 and for a continuous period of at least three years following the completion of the Contractor's services under this Agreement. The policy shall provide for coverage for all work performed by the Contractor. The Contractor shall ensure that any subcontractors hired by the Contractor that perform work on the Contractor's behalf will maintain their own Errors and Omissions Professional Liability Insurance coverage in the amount of no less than \$2,000,000 and the Contractor shall obtain evidence of such insurance in a manner satisfactory to the HHA and provide such evidence to the HHA upon the HHA's request. The policy must also be endorsed with a thirty (30) day notice of cancellation or non-renewal in favor of the HHA.

7.2 Before commencing its performance of any work or services under this Contract, the Contractor, at the request of the HHA, shall provide the HHA with copies of the applicable certificates of insurance, policies, declarations, and endorsements for the required coverages listed above so that the HHA may confirm: (a) that said coverages are valid and in effect; (b) that it is named as an additional insured under the Contractor's comprehensive general liability insurance policy ("CGL"), umbrella/excess liability insurance, errors and omissions/professional liability insurance and its automobile liability insurance policy; (c) that none of the required policies may be cancelled or non-renewed until at least thirty days prior written notice has been provided to the HHA; (d) that the Contractor's CGL policy, umbrella/excess liability and automobile policy are primary; and that (e) the Contractor's CGL policy, workers' compensation, umbrella/excess liability insurance and automobile policy contain waivers of subrogation in favor of the HHA. All certificates of insurance must reference this job/project and contract number.

- 7.3 All insurance shall be carried with companies that are financially responsible and admitted to do business in the State of Texas. The Contractor shall not permit the insurance policies required for this Contract to lapse during any period for which this Agreement is in effect.
- 7.4 The insurance requirements in this section are not intended to and shall not in any manner limit or qualify the liabilities or obligations assumed by the Contractor under this Contract, including, but not limited to, liability assumed by the Contractor pursuant to section 8 of this Contract.
- 7.5 The Contractor shall be solely responsible for any premiums, deductibles, or self-insured retentions that may apply to the insurance coverages required in this Contract.
- 7.6 The Contractor shall require each of its subcontractors, if any, to provide the coverages noted in this section, unless such coverages are waived or reduced in writing by the HHA.

## **8. INDEMNITY AND HOLD HARMLESS.**

- 8.1 THE CONTRACTOR SHALL INDEMNIFY, DEFEND, AND HOLD THE HHA AND ITS OFFICERS, AGENTS, SUBSIDIARIES, AFFILIATED ENTITIES, COMMISSIONERS AND EMPLOYEES (THE “INDEMNIFIED PERSONS”) HARMLESS FROM ALL LIABILITY, LOSS OR DAMAGE, INCLUDING REASONABLE ATTORNEY FEES AND EXPENSES, RESULTING FROM, BROUGHT FOR, OR ON ACCOUNT OF ALL CLAIMS, DEMANDS, AND CAUSES OF ACTION OF EVERY KIND AND CHARACTER ASSERTED BY ANY PERSON (INCLUDING, WITHOUT LIMITATION, THE INDEMNIFIED PERSONS’ OR CONTRACTOR’S EMPLOYEES), FOR PERSONAL INJURY, DEATH, OR FOR LOSS OF OR DAMAGE TO ANY AND ALL PROPERTY IN ANY WAY ARISING OUT OF, IN CONNECTION WITH, OR TO THE EXTENT CAUSED BY THE CONTRACTOR OR ANY SUBCONTRACTOR’S PERFORMANCE HEREUNDER. SUCH INDEMNITY SHALL BE WITHOUT REGARD TO THE NEGLIGENCE (WHETHER ACTIVE, PASSIVE, SOLE, CONCURRENT OR GROSS), STRICT LIABILITY OR OTHER FAULT OF ANY INDEMNIFIED PERSON. CONTRACTOR ACKNOWLEDGES AND AGREES THAT THIS INDEMNITY CONTROLS OVER ALL OTHER PROVISIONS IN THE AGREEMENT AND SURVIVES THE TERMINATION OF THIS AGREEMENT.**
- 8.2 THE CONTRACTOR SHALL BE RESPONSIBLE FOR, AND SHALL RELEASE AND HOLD HARMLESS THE HHA FROM ANY LIABILITY FOR, ALL DAMAGE AND LOSS SUSTAINED BY IT TO ITS TOOLS AND EQUIPMENT UTILIZED IN THE PERFORMANCE OF SERVICES, OR THE PERFORMANCE OF ANY SUBCONTRACTORS’ SERVICES, HEREUNDER. THE CONTRACTOR SHALL BE RESPONSIBLE FOR SATISFYING ALL**

**DEDUCTIBLES UNDER ITS POLICIES WITHOUT REIMBURSEMENT FROM THE HHA AND THE DEDUCTIBLE PORTION OF ANY LOSS SHALL NOT BE EXCLUDED FROM THE CONTRACTOR'S INDEMNITY OBLIGATION.**

**8.3 NOTWITHSTANDING ANYTHING HEREIN TO THE CONTRARY, ANY LEGAL LIMITATIONS AFFECTING THE SCOPE OF PERMISSIBLE INDEMNITY SHALL BE READ INTO THESE CLAUSES SUCH THAT THE CLAUSE PROVIDES THE MAXIMUM INDEMNITY PURSUANT TO ITS TERMS WHILE STILL COMPLYING WITH THE LEGAL LIMITATIONS.**

**9. Notices.**

9.1 All notices and communications regarding the Contract must be in writing and shall be directed to the following representatives:

**HHA**

Donna Dixon  
Community Affairs and Customer Service Director  
Houston Housing Authority  
2640 Fountain View Drive  
Houston, Texas 77057  
Tel: 713-260-0754  
Email: ddixon@housingforhouston.com

**CONTRACTOR**

Matt Gilson  
President  
Gilson Software  
1401 East Broward Boulevard, Suite 205  
Fort Lauderdale, FL 33301  
Tel: (888) 252-2338  
Email: matt@gilsonsoftware.com

**10. Compliance with Federal Laws and Regulations**

10.1 To the extent applicable, the Contractor shall comply with any and all federal laws and regulations, including but not limited to, the following:

- The requirements of Title VII of the Civil Rights Act of 1968 and Title VI of the Civil Rights Act of 1964, relating to prohibitions against discrimination in housing and the benefits of federally funded programs because of race, color, religion, sex, or national origin;
- The prohibition against discrimination on the basis of age under the Age Discrimination Act of 1975, the prohibition against discrimination against handicapped individuals under Section 504 of the Rehabilitation Act of 1973 and the Americans with Disabilities Act;
- All federal and state laws, rules and regulations related to energy efficiency and resource conservation;
- The requirements of Executive Order 11246 relating to equal employment opportunity in connection with federally funded programs;
- The requirements of Section 3 of the Housing and Urban Development Act of

1968 relating to training and employment of individuals and contracting for business opportunities in metropolitan areas in which federally funded programs are being operated; and

- The requirements of Executive Orders 11625, 12432 and 12138 to implement Minority Business Enterprise (“MBE”) and Women’s Business Enterprise (“WBE”) participation goals in federal agencies’ programs.

#### **11. Compliance with M/WBE and Section 3 Policy.**

- 11.1 When subcontracting, the Contractor agrees to utilize its good faith and best efforts to subcontract a sufficient dollar amount with M/WBE’s certified as such or recognized by the HHA as certified M/WBE in an effort to meet the HHA’s goal of a minimum of 30% of the final contract dollars being expended on one or more M/WBEs. All adjustments that cause the contract price to increase will also increase the total amount that the Contractor must expend on M/WBEs.
- 11.2 The Contractor hereby specifically agrees to adhere to the M/WBE Participation Plan as submitted by the Contractor and attached hereto as Exhibit 3.
- 11.3 The Contractor further agrees to adhere to the Section 3 Business Certification as submitted by the Contractor within its Response, attached hereto as Exhibit 4.

#### **12. Records.**

- 12.1 Without limitation to any other provision of the Contract, the Contractor shall maintain all records pertaining to the Contract, which the HHA reasonably requires for three (3) years from the expiration date of the Contract unless a longer period is required under Title 24, CFR §85.42. The Contractor shall maintain records required by 24 CFR §135.120 for the period that HUD requires the records to be maintained. The Contractor will give the HHA, HUD, the Comptroller General of the United States, the General Accounting Office, and any of their authorized representative’s access to, and the right to examine, audit, copy, or reproduce all records pertaining to the project financed under the Contract and the operation of the program or project. The right to access shall continue as long as the records are required to be maintained.

#### **13. Independent Contractor.**

- 13.1 The Contractor is an independent contractor of the HHA and not an employee of the HHA. Nothing contained in the Contract will be deemed or construed to create a partnership between the Contractor and the HHA. The Contractor will have no authority to create any obligation or make representations or warranty binding on the HHA. All personnel supplied or used by the Contractor in connection with this Contract will be deemed employees, agents, or subcontractors of the Contractor and will not be considered employees, agents, or subcontractors of the HHA for any purpose whatsoever. The Contractor is solely responsible for payment of wages and

overtime to the Contractor's employees. By entering into this Contract the Contractor and the HHA are not entering into a joint employment relationship or an employment relationship of any kind.

- 13.2 The Contractor agrees to comply with all applicable federal and state laws pertaining to the proper classification of workers. Additionally, the Contractor is aware that in accordance with Section 214.008 of the Texas Labor Code, contractors and subcontractors who fail to properly classify individuals performing work under a governmental contract will be penalized \$200.00 for each individual that has been misclassified.

#### **14. Subcontracts.**

- 14.1 The Contractor shall not subcontract any portion of its services under this Contract without first obtaining the written consent of the HHA.

#### **15. Non-Appropriation.**

- 15.1 The Contractor understands that the HHA is a governmental entity and this Agreement is contingent upon the receipt, availability and allocation of funding allocated to the HHA for the payment of such services or obligations. Should it not be funded for any period during the term of the Agreement, any sums due for the remainder of the term shall be forgiven and the HHA shall not be liable for payment. HHA may terminate this Agreement in writing at any time, or suspend services, if sufficient funds are not available to continue operations under this Agreement. Upon such written notice from the HHA, the Contract will automatically terminate.

#### **16. Proprietary Information.**

- 16.1 The Contractor shall maintain the confidentiality of all proprietary information provided to it by the HHA. Information in the public domain, or otherwise obtained independently by the Contractor, is not considered confidential.
- 16.2 Any programs, data, or other materials furnished by the HHA for use by the Contractor concerning the services performed under the Contract shall remain the sole property of the HHA.

#### **17. Ownership of Work Product.**

- 17.1 All drawings, designs, specifications, manuals, reports, studies, surveys, models, software, source code and source code documentation, documentation or system architecture and any other documents, materials, data and products ("**Work Product**") prepared or assembled by the Contractor or its subcontractors pursuant to this Contract shall be the exclusive property of the HHA and copies of all Work Products shall be delivered to the HHA upon the completion or termination of the Contract. The Contractor hereby assigns to the HHA ownership of all right, title and interest in and

to such Work Products, including ownership of any copyright, patent, trademark, trade secret, or other intellectual property or proprietary rights in the Work Product. Further, Contractor hereby grants to the HHA a perpetual, royalty-free, paid-in-full, nonexclusive and irrevocable license to copy, reproduce, perform, dispose of, or use, in whole or in part, the Work Product and to authorize others to do so. The Contractor also agrees to execute all papers necessary for the HHA to perfect its ownership of the rights in the Work Product.

## **18 Criminal Background Checks Required.**

- 18.1 After execution of this Agreement and as soon as reasonably possible, the Contractor shall conduct criminal background checks on all employees and subcontractors before such employees or subcontractors are assigned to perform any work under this Agreement. The Contractor agrees that no employee or subcontractor currently suspended or debarred under 2 CFR § 180, et seq., or who has been convicted of a felony, shall be authorized to perform any work under the terms of this Agreement, without prior written approval from the HHA.

## **19. Special Requirements.**

- 19.1 The Contractor agrees that if the United States Department of Housing and Urban Development (“HUD”) requires a cost certification after substantial completion of the work performed under the Contract, then the Contractor will cooperate with the HHA and HUD and assist in providing such cost certification, provided that any payment to the Contractor hereunder shall not be conditioned upon any such cost certification, but shall be paid in accordance with the terms of the Contract.

## **20. Time.**

- 20.1 Time is of the essence in the Contract and each and all of its provisions.

## **21. Tax Exempt Status.**

- 21.1 The HHA is a unit of government and its functions are governmental functions. Its property is public property used for essential public and governmental purposes. By virtue of Section 392.005 of the Texas Local Government Code (the “Housing Authorities Law”), the HHA and its property are exempt from all taxes, including sales tax. A copy of the Tax Exemption Certificate will be provided to the Contractor, if required.

## **22. Cooperation with HHA.**

- 22.1 In the performance of this Contract, the Contractor agrees to cooperate with the HHA and its staff, including the HHA’s Section 3 Coordinator.



## 23. Miscellaneous.

- 23.1 *Legal Construction/Severability.* HHA and Contractor agree, that if any term or provision of this Agreement is declared by a court of competent jurisdiction to be illegal or in conflict with any law, the validity of the remaining terms and provisions shall not be affected, and the rights and obligations of the parties shall be construed and enforced as if the Agreement did not contain the particular term or provision held to be invalid. The failure of either party to enforce any provision of this Agreement shall not constitute a waiver by the party of that or any other provision of this Agreement. Whenever context requires, the singular will include the plural (and vice-versa) and references to gender shall include the masculine and feminine. Article and section headings in this Contract are for reference only and are not intended to restrict or define the text of any section or article herein. This Contract shall not be construed more or less favorably by reason of the authorship or origin of its language; this Contract shall not be construed against the drafter in the event of an ambiguity (or otherwise).
- 23.2 *Limitation of Liability.* In no event shall the HHA be liable to the Contractor for any indirect, incidental, or exemplary damages.
- 23.3 *Own Investigation.* The Contractor represents and warrants that it entered this Contract based solely on its own investigation and due diligence and not on reliance on any statements, representations, or omissions of the HHA unless otherwise noted in this Contract. The Contractor represents and warrants that it is fully satisfied that it has received any information it requested from the HHA in order to determine whether to enter this Contract. The Contractor expressly disclaims any reliance on any representation, statement, or omission by the HHA with respect to this Contract, including the Contractor's decision to enter this Contract, unless otherwise noted herein.
- 23.4 *Venue and Choice of Law.* Venue for any legal action arising from or relating to this Contract shall exclusively lie in Harris County, Texas. The laws of the State of Texas shall govern and control any dispute that arises from or relates to this Agreement. In the event of any litigation arising from or related to this Agreement, or the services provided under this Agreement, each party will be responsible for its own costs incurred including staff time, court costs, attorney fees, and all other related expenses incurred in such litigation.
- 23.5 *Notice of Court Actions.* The Contractor agrees to give the HHA immediate notice in writing of any actions or suits filed and prompt notice of any claims made against the HHA or any of the parties involved in the implementation and administration of the Contract.
- 23.6 *Integration.* This Contract, along with the attached Exhibits, contains the complete agreement of the Parties and cannot be varied except by the Parties' written agreement. The Parties agree that there are no oral agreements, representations, or warranties that are not expressly set forth in this Contract.

- 23.7 *Waiver of Default.* It is not a waiver of or consent to default if the non-defaulting party fails to declare immediately a default or delays in taking any action. Pursuit of any remedy set forth in this Contract does not preclude pursuit of other remedies in this Contract or that are provided by law.
- 23.8 *Non-Waiver.* No covenant or condition of the Contract may be waived except by written consent of the waiving party. Forbearance or indulgence by one party in any regard whatsoever shall not constitute a waiver of the covenant or condition to be performed by the other party to which the same may apply, and until complete performance of any covenant or condition, the aggrieved party shall be entitled to invoke any remedy available to it under the Contract or by law or in equity despite such forbearance or indulgence. Unless otherwise stated herein, this Contract cannot be modified or altered in any way without the express written consent of the parties hereto.
- 23.9 *Remedies Cumulative.* All rights and remedies of HHA and Contractor shall be cumulative and may be exercised successively or concurrently. The foregoing is without limitation to or waiver of any other rights or remedies of HHA according to law.
- 23.10 *Legal and Regulatory Compliance.* All activities under this Agreement shall comply with all applicable local, state and federal laws, ordinances and regulations. This Agreement shall automatically be amended as necessary to comply with all applicable local, state and federal laws, ordinances and regulations, including incorporation of any provisions now or hereafter applicable to the subject matter hereof and/or required to be included by any federal, state or local governmental authority with relevant jurisdiction over the subject matter hereof. Any such change or incorporation of legal and regulatory requirements shall be deemed incorporated herein, irrespective of whether or not such provisions are expressly set forth in this Agreement or any written amendment hereto.
- 23.11 *Assignment.* The Contractor shall not assign, subcontract, or transfer any services, obligations, or interest in this Contract without the prior written consent of the HHA. Such consent shall not unreasonably be withheld when such assignment is for financing the Contractor's performance.
- 23.12 *Successors and Assigns.* This Contract shall be binding on and inure to the benefit of the parties to this Contract and their respective heirs, executors, administrators, legal representatives, successors, and assigns, if any.
- 23.13 *No Third-Party Rights.* Nothing contained in this Contract shall create a contractual relationship with or a cause of action in favor of third party against either the HHA or the Contractor.
- 23.14 *Amendment.* This Agreement may only be amended by a written amendment signed by the authorized agents of both parties.

- 23.15 *Survival.* The terms, conditions, representations, and all warranties contained in this Agreement shall survive the termination or expiration of this Agreement.
- 23.16 *Publicity.* Contractor shall not use in its advertising, marketing or other promotion efforts; any data, pictures or other representation of HHA except on prior specific written authorization from the HHA President/CEO or designee.
- 23.17 *No Personal Inducements.* Contractor acknowledges and agrees that HHA requires all Contractors to adhere to basic principles in conducting business with HHA. These principles include no direct or indirect personal inducement of HHA employees or Commissioners, such as the giving of gifts, money, tickets, trips, loans, discounts or any other item or service in connection with this Agreement. Contractor further acknowledges and agrees that breach of these principles may be grounds for termination of this Agreement.
- 23.18 *Force Majeure.* Neither party hereto will be liable or responsible to the other for any loss or damage or for any delays or failure to perform due to causes beyond its reasonable control including, but not limited to acts of God, strikes, epidemics, pandemics, disease, war, acts of terrorism, riots, civil disorder or unrest, flood, fire, tsunami, volcano, sabotage, air space closure, ground stop(s), a U.S. Department of State Travel Warning or any other circumstances of like character (“force majeure occurrence”).
- 23.19 *Other:* Contractor shall adhere to all federal, state and local laws and ordinances, as well as standards and recommendations outlined by the World Health Organization (WHO); Centers for Disease Control (CDC) and Occupational Safety and Health Administration (OSHA), and any other standards or procedures applicable to Contractor as it relates to the health, safety and welfare of tenants, residents, guests, HHA employees and others who may be involved in the execution of this Agreement.
- 23.20 *Authority.* Contractor represents and warrants that Contractor has the power and authority to enter into and perform this Agreement and that this Agreement, when executed and delivered, shall be a valid and binding obligation of Contractor enforceable in accordance with its terms.

**IN WITNESS THEREOF**, this document may be executed in multiple counterparts. Each counterpart is deemed an original. All counterparts together constitute one and the same instrument. Each party warrants that the undersigned is a duly authorized representative with the power to execute this contract.

**\*\*\*\*\*SIGNATURES FOLLOW\*\*\*\*\***

IN WITNESS THEREOF,

HOUSTON HOUSING AUTHORITY

DocuSigned by:

*David A. Northern Sr.*

9E8D4D8C1AF04AA

By: \_\_\_\_\_

David A. Northern, Sr.

12/21/2022 President & CEO

Date: \_\_\_\_\_

GILSON SOFTWARE & CALL  
CENTER SERVICES

By: \_\_\_\_\_

*Matt Gilson*  
Matt Gilson  
President

Date: \_\_\_\_\_

*12/13/2022*

Contract No. 22-35

**Exhibit B**

Pricing

Cost Per Minute (CPM):

0 to 4,000 minutes	@ \$0.70
4,001 to 8,000 minutes	@ \$0.65
8,001 to 16,000 minutes	@ \$0.60
16,001 to 24,000 minutes	@ \$0.55
24,001 Plus minutes	@ \$0.50