Leon County R&D Authority
Auditor RFP 17-01 – Pre-proposal Conference
Wednesday, May 10, 2017, 3:00pm

In Attendance:
Bob Powell, James Monroe & Co.
Megan Keplinger, Thomas Howell Ferguson, PA, CPAs
Bonnie Gandy and Jon Ingram, Law Redd Crona & Munroe, PA

LCRDA Staff: Ron Miller and Peggy Bielby

Meeting was called to order at 3:00pm.
Ron Miller reviewed the general information and overview of the Request for Proposals for Professional Auditing Services: RFP 17-01, Release Date: April 17, 2017. He noted an error on page 1 of the RFP in which the date May 26, 2017 should indicate it is a Friday. He also noted that the requirement that an electronic copy be submitted on a USB drive could also be satisfied by emailing the PDF version to him at rmiller@inn-park.com before the submission deadline. Paper hardcopies are still required to be submitted.

Questions:
Q1: Is pricing is to be submitted at the same time as the technical proposal but under separate cover to be considered later?
Answer: Yes

Re: YARDI Voyager v5.05 software service used by NAI Talcor:
Q2: The service provider is both hosting and supporting the application. Is any data kept locally?
 Answer: No, all YARDI electronic data is cloud based.
Q3: Has the system been customized at all for Talcor's needs?
 Answer: Not to our knowledge. However, they can do certain custom configurations within the system capabilities.
Q4: The service provider manages the data backups?
 Answer: Yes, and issues a SOC1 report that is available to the Auditor.
Q5: Does the service provider administer the access, or provide functionality that allows them to distribute access administration for a customer?
 Answer: LCRDA has one user access with view access only, and all of the other accesses within the system are controlled by Talcor.
Q6: Does it have the ability to export information in Excel? Does it include snapshots of certain reporting periods?
 Answer: Yes
Q7: Does it have ad hoc data extraction capabilities?
 Answer: Yes

Meeting adjourned at 3:10pm.