



# TACOMA HOUSING AUTHORITY

## RESOLUTION 2015-12-16 (3)

**Date:** December 16, 2015

**To:** THA Board of Commissioners

**From:** Michael Mirra  
Executive Director

**Re:** Authorization to Award Contract to Synergy Business Solutions for Enterprise Financial System

### Background

This resolution authorizes Tacoma Housing Authority's (THA's) Executive Director to negotiate and, if those negotiations are successful, to execute a contract with Synergy Business Solutions for THA's new Enterprise Financial System.

The contract with Synergy will come in three parts: 1) custom development, 2) training, support, and implementation, and 3) annual licensing of the Intacct product. Below are the details and the cost of each of these parts.

### Custom Development

When THA chose Salesforce as its enterprise software solution at the beginning of the year, it was uncertain what financial system it would use. We need a system that is cloud-based and that would either reside on the Salesforce platform or closely integrate with Salesforce. Through a lengthy procurement process, THA staff selected Intacct as its next financial system. Intacct does not reside on the Salesforce platform but is closely integrated with Salesforce. In order to setup the integrations so that it works seamlessly with Salesforce, Intacct will need to customize the product and the integration module so that the data on the Intacct side flows seamlessly into the required objects on the Salesforce side. We estimate that this work will take about 400 hours, or **\$85,100**. During the procurement process in which THA selected Salesforce, we estimated that it would cost \$100,000 to customize a financial system to work with Salesforce, so this estimate is in line with the number already budgeted.

### Training, Support, and Implementation

Synergy is a reseller of the Intacct financial software and they will provide on-site training, configurations, testing, consultation, data conversion, and go-live assistance to THA staff. They will also provide user policy and procedural manuals that they will customize to fit THA's workflow and current policy structure. We estimate that this work will take 240 hours, or **\$51,060**. During the procurement process in which THA selected Salesforce, the implementation costs were not included in the budget.

**Annual Licensing of the Intacct Product**

All licensing fees for the Intacct product will be paid to Synergy, Intacct's reseller. Licenses will renew annually. Based on the number of staff who will require an Intacct license and the modules included, the licenses will cost **\$42,912 per year**. During the procurement process in which THA selected Salesforce, it was estimated that the licensing for the new financial system would be \$60,000 per year, so the licensing fees proposed by Synergy are in line with the number already budgeted.

**Recommendation**

Approve Resolution 2015-12-16 (3), formally authorizing THA's Executive Director to negotiate, and if those negotiations are successful, execute a contract with Synergy Business Solutions for customization, implementation, and annual licensing of the Intacct financial system.



# TACOMA HOUSING AUTHORITY

## **RESOLUTION 2015-12-16 (3) (Authorization to Award Contract to Synergy Business Solutions For Enterprise Financial System)**

A **RESOLUTION** of the Board of Commissioners of the Housing Authority of the City of Tacoma

**WHEREAS**, THA requires a cloud-based finance and accounting system that will integrate with Salesforce, and

**WHEREAS**, THA staff defined the requirements for its financial system and reviewed Intacct's response thoroughly to ensure it meets the agency needs, and

**WHEREAS**, On August 7, 2015, THA issued a Request for Proposal (RFP) for a new enterprise financial system, and

**WHEREAS**, THA received three (3) proposals, one of which was deemed unresponsive, and

**WHEREAS**, The top two (2) vendors were invited to THA offices to give product demonstrations, and

**WHEREAS**, The selection committee unanimously selected Intacct as its financial system, and

**WHEREAS**, Intacct engaged its local reseller, Synergy Business Solutions, to handle contract terms, issues licenses, and oversee the software customizations and implementation, and

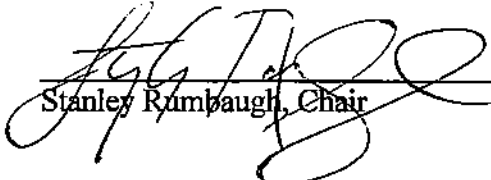
**WHEREAS**, THA budgeted in 2015 for financial system customizations, and

**WHEREAS**, The contract with Synergy will cover product customizations, configuration, support, training, testing, data conversion, implementation, and annual product licensing of the Intacct product, now, therefore be it

**Resolved by the Board of Commissioners of the Housing Authority of the City of Tacoma, Washington as follows:**

THA Executive Director has the authority to negotiate and, if those negotiations are successful, execute a contract with Synergy Business Solutions for Intacct customization, implementation, and annual licensing.

**Approved: December 16, 2015**

  
Stanley Rumbaugh, Chair