

Prepared by: Martin Greenlee  
 Phone: 360-964-0694  
 Email: [Martin.Greenlee@NeighborlySoftware.com](mailto:Martin.Greenlee@NeighborlySoftware.com)

DATE	6/18/2019
QUOTE #	423
VALID UNTIL	7/18/2019

## CLIENT

PR Avila  
 Hidalgo County Urban County Program, Texas  
 (956) 787-8127  
[patricio.avila@co.hidalgo.tx.us](mailto:patricio.avila@co.hidalgo.tx.us)



Annual Recurring Fees	USER PRICE	FREQ	USERS	ANNUAL PRICE
Neighborly Software Per Administrator Fee (Users 1-10)	\$175	Monthly	3	\$6,300.00
Neighborly Software Per Administrator Fee (Users 11-20)	\$125	Monthly	0	\$0.00
Neighborly Software Per Administrator Fee (Users 21+)	\$75	Monthly	0	\$0.00
- Technical Support	Included			
- Hosting/Security in Microsoft Tier IV Data Center	Included			
- Data Storage, Backup and Recovery	Included			
<b>ANNUAL TOTAL</b>				<b>\$6,300.00</b>

One Time Implementation Fee	UNIT PRICE	FREQ	UNIT	AMOUNT
Software Implementation Per Program <sup>a</sup>	\$1,500	One Time	1	\$1,500.00
- Software Configuration to Client Design	Included			
- Administrator Training (8 hrs Onsite)	Included			
- Administrator Guide	Included			
- Travel	\$800	Per Trip	1	\$800.00
<b>TOTAL \$</b>				<b>2,300.00</b>

a - Includes configuration for the following programs:

(1) [Housing Rehabilitation](#)

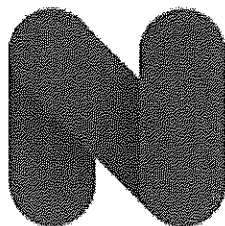
## Notes

1. Recurring fees are invoiced annually in advance.
2. Implementation fees are invoiced at engagement

If you have any questions about this price quote, please contact

[Martin Greenlee](#)

**Thank You For Your Business!**



# Neighborly Software

Hosted software solution for housing and community development programs.

Education • Government • Health/Medical

Follow



Overview

Founders

Neighborly Software, headquartered in Atlanta, GA, was established in January of 2016. The company was founded on the belief that the administration of housing, economic and community development programs is evolving. Forward-thinking communities want their staff to spend more time maximizing community investment outcomes and less time on administration, compliance, and reporting.

Neighborly Software's cloud software provides a turnkey solution for the enrollment, administration and reporting of housing, economic and community development programs. Neighborly Software is the only provider in the market that incorporates all the functionality required to administer these programs, including grant management, customer relationship management, loan processing and construction and rehab management.

With a single integrated solution, housing, economic and community development departments can drive operational efficiency, improve their

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compliance and maximize community investment outcomes.

Unlike other generic business platform solutions, our software is specifically built for, and used by, housing, economic and community development professionals. It is our belief that we can help housing and community development professionals take a step towards maximizing community impact by modernizing their approach to administration. We share a common goal: to improve the lives of vulnerable residents within low and moderate income communities. We want to ensure that every community is equipped with the proper technology and best practices to ensure their residents are well provided for without compromising compliance and/or reporting.

Less information

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# Administer All of Your Programs In One Solution

Maximize Community Investment. Minimize Administrative Burden.

<i>Down Payment Assistance</i>	<i>Employer Assisted Housing</i>
<i>Lead Hazard Remediation</i>	<i>Home Weatherization</i>
<i>Emergency Home Repairs</i>	<i>Home Accessibility Modifications</i>
<i>Single/Multi Family Home Rehabilitation</i>	<i>Affordable Housing Development</i>
<i>Community Land Trust</i>	<i>Public Service Grants</i>
<i>Tenant Based Rental Assistance</i>	<i>Property Acquisition &amp; Demolition</i>
<i>Public Infrastructure Activities</i>	<i>Commercial Façade Improvements</i>
<i>Asset Management (Housing)</i>	<i>Business Attraction Grants</i>
<i>Small Business Loans</i>	<i>Disaster Recovery</i>

## Five modules, One Comprehensive Solution

Our cloud-based software provides a comprehensive solution for the enrollment, administration and reporting of housing, economic, and community development programs.



Grant Management



Relationship Management



Loan Processing



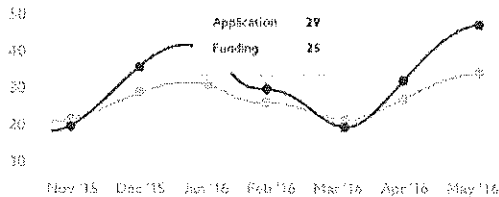
Construction & Rehab



Asset Management

Chart: Applications vs Fundings

Advanced



Approve, allocate and monitor grant funds and activities.

- ✓ Accept, review and score grant applications (e.g. CDBG, HOME, etc.)
- ✓ Allocate and track sub recipient grant funding
- ✓ Enable sub recipients to submit invoices, accomplishment reports and section 3 reports
- ✓ Track program income
- ✓ Generate CAPERs reports

STATUS	NUMBER	GRANT
Open	20	\$10,765

## A Comprehensive Solution for Stakeholders

Administrators

Beneficiaries

Sub-Recipients



Inspectors


Contractors & Developers





...

## How Much is "Manual" and "Complicating" Costing You?

By eliminating paper-based applications, manual processes and outdated technology, organizations can maximize their community investment dollars and minimize their compliance risk.

  
**Online**  
Eliminate re-keying data and filing paper copies. Utilize online applications and document storage.

  
**Validation**  
Reduce incomplete applications with software guided application and validation process.

  
**Workflow**  
Improve cycle time with automated workflow and approval routing.

  
**Document Generation**

  
**Reporting**

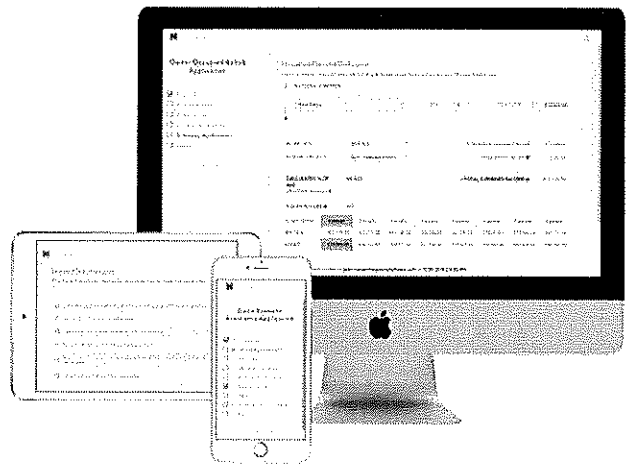
  
**Self-Service**

## Take the Office Anywhere

Complete forms, upload documents and access case files anywhere, anytime, from any internet enabled device

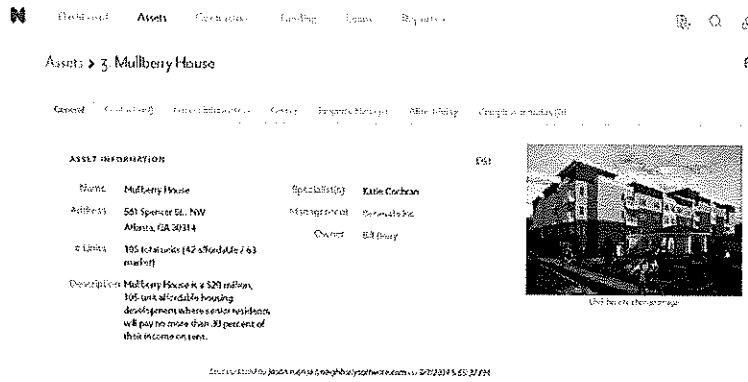
## Neighborly Software Benefits

Neighborly software is designed to improve administrative productivity and program compliance so you never feel the strain of your legacy process or technology again. Display your results with a real time dashboard and clear reporting. Protect sensitive data with role based security and an audit trail of all case activities. Eliminate searching for paper documents in filing cabinets. Create, email and print custom form letters with the click of a mouse, including promissory notes, property deeds and contractor agreements. Then sleep better at night knowing that workflow automation is enforcing compliance controls and required approvals.



## Configurable Software

Optimize Neighborly Software to your community's specific needs, including custom workflows, forms and document generation requirements.



### Asset Management

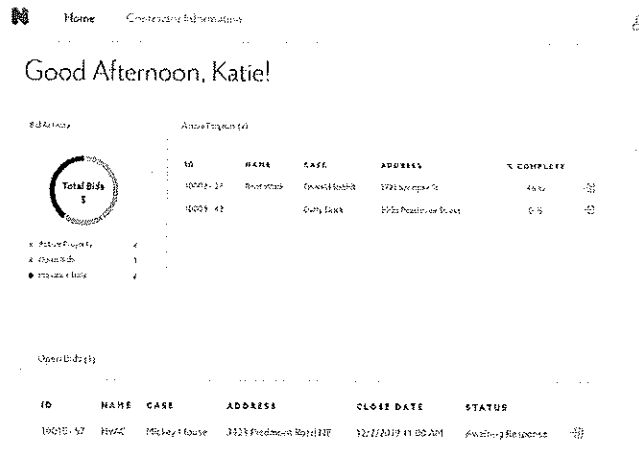
The Asset Management module provides a turn-key solution for Program Administrators and Property Managers. This tool helps manage compliance and reporting requirements associated with affordable housing properties. Track all 'active' and 'inactive' properties that Program Administrators are/were responsible for compliance monitoring. Property Managers can track and store all tenant communications and interactions for audit purposes (Audit Log) through our software.

### Budget Management

Manage all federal, state, local and private funding sources in one solution. Easily assign and track multiple funding sources per project/activity. Using Neighborly Software's solution you can enable contractors and subrecipients to submit draw requests online, including the uploading of all required supporting documents. This feature is perfect for tracking program income in one place.

### Subrecipient Grant Management

Enable subrecipients to complete funding applications online, including uploading all required documents. Allow internal and external reviewers to score subrecipient applications based on scoring criteria. Create subrecipient budgets based on committee recommendations. Allow subrecipients to complete monthly/quarterly accomplishment reports, including all standard HUD accomplishment data. Complete "desk" and "onsite" monitoring with customized forms and checklists.



### Contractor Portal

Enable contractors to register online as a vendor, including the uploading of all required compliance documents. Provide contractors with the ability to submit construction bids online. Request and manage change orders. Submit

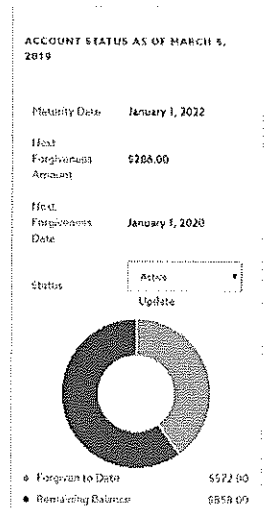
### Property Inspections

Complete HQS or other property inspection forms from the field using any internet enabled mobile device. Leverage the mobile device camera to capture and save images to the inspection form. Include "tips" to help inspectors validate their findings and results.

### Reporting

Generate standard HUD accomplishment reports across all of your projects/activities. Create and save ad-hoc reports based on unique queries. Export all data to Excel for further manipulation. Display all housing, economic and community development activities on a map.

draw requests including the uploading of all required supporting documents (receipts, timesheets, etc).



### Loan Management

Originate and track deferred, forgivable and amortizing loans. Qualify applicants based on underwriting ratios and guidelines. Produce loan documents, payment coupons, 1098 forms and payoff letters. Enable participants to view current loan information and historical payment/forgiveness events.



### Document Management

Securely store all documents electronically with the ability to print or email documents on demand. Generate customized form letters by merging case data with document templates. Create customized emails by merging case data with email templates.



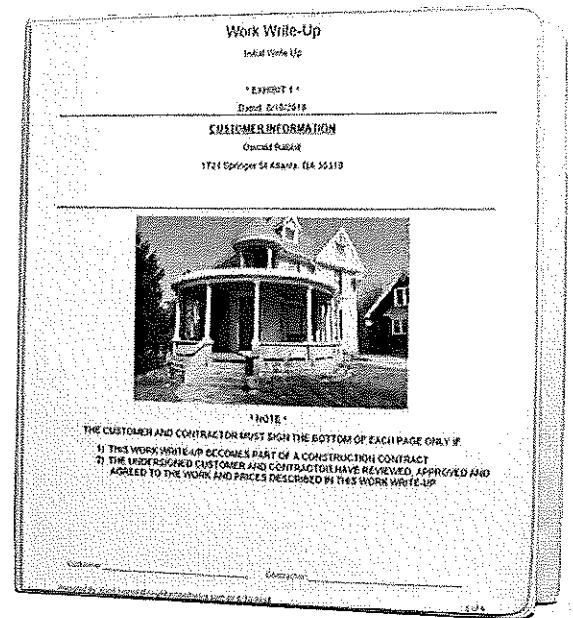
### Application Management

Our tool gives third parties the ability to complete and submit online applications, including the uploading and storage of all supporting documents. Making fields and supporting documents "required" helps you quickly qualify applicants by household income and local AMI. Eliminate repetitive back and forth communication by enabling applicants to electronically sign completed forms and automate email alerts upon the successful submission of an application.

## Work Write Up

- ✓ Create work write ups based on 900+ pre-loaded construction specifications.
- ✓ Organize work write ups by construction category, room location and/or priority level.
- ✓ Develop internal estimates based on fixed and variable specification costs.
- ✓ Manage the specification library to your jurisdiction's unique code requirements and cost data.

See Example



Industry Leader Best Practices [Review](#)

## Simple Setup

By eliminating paper-based applications, manual processes and outdated technology, organizations can maximize their community investment dollars and minimize their compliance risk.



### Fast Implementation

Average implementation is 2-3 weeks, which means minimal disruption to the organization and immediate benefits.



### Minimal IT Involvement

Cloud based software hosted in Microsoft data center with SSL encryption, US geo-replication, and 14 day point in time data backup.



### Highly Configurable

Software is configured to meet your unique forms, workflow, and document templates.



### Affordable

Pricing is based on the number of users and can be subsidized with HUD funds as an Activity Delivery Cost.



A NEW WAY TO SIGN IN - If you already have a SAM account, use your SAM email for login.gov.

Log In

Login.gov FAQs

ALERT: SAM.gov will be down for scheduled maintenance Friday 06/28/2019, from 8:00 PM to 12:00 AM (EDT).

ALERT: CAGE is currently experiencing a high volume of registrations, and is working them in the order in which they are received. When your registration is assigned to a CAGE Technician, you will be contacted by CAGE, if necessary, for any additional information.

Entity Dashboard

Benevate Inc.
DUNS: 071701687 CAGE Code: 8BJ09
Status: Active
Expiration Date: 05/23/2020
Purpose of Registration: All Awards
3423 Piedmont Rd NE Ste 373
Atlanta, GA, 30305-1751,
UNITED STATES

- Entity Overview
Entity Registration
Core Data
Assertions
Reps & Certs
POCs
Exclusions
Active Exclusions
Inactive Exclusions
Excluded Family Members

RETURN TO SEARCH

Entity Overview

Entity Registration Summary
Name: Benevate Inc.
Business Type: Business or Organization
Last Updated By: John Rusnak
Registration Status: Active
Activation Date: 06/18/2019
Expiration Date: 05/23/2020

Exclusion Summary
Active Exclusion Records? No



IBM-P-20190611-1139
WWW6

- Search Records Disclaimers FAPIIS.gov
Data Access Accessibility GSA.gov/IAE
Check Status Privacy Policy GSA.gov
About USA.gov
Help

This is a U.S. General Services Administration Federal Government computer system that is "FOR OFFICIAL USE ONLY." This system is subject to monitoring. Individuals found performing unauthorized activities are subject to disciplinary action including criminal prosecution.



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

12/13/2018

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

<b>PRODUCER</b> FounderShield, LLC 119 W 24th Street, 3rd Floor New York, New York, 10011	<b>CONTACT NAME:</b>		
	<b>PHONE (A/C No, Ext):</b> 646-854-1058	<b>FAX (A/C No):</b>	
<b>E-MAIL ADDRESS:</b> coi@foundershield.com			
<b>INSURED</b> Benevate 3423 Piedmont Rd NE Atlanta, Georgia, 30305	<b>INSURER(S) AFFORDING COVERAGE</b>		<b>NAIC #</b>
	INSURER A : CONTINENTAL CASUALTY CO (CNA)		20443
	INSURER B : CONTINENTAL INSURANCE CO (CNA)		35289
	INSURER C : ACE FIRE UNDERWRITERS INS CO		20702
	INSURER D :		
	INSURER E :		
INSURER F :			

COVERAGES

CERTIFICATE NUMBER:

REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
A	<b>COMMERCIAL GENERAL LIABILITY</b> <input type="checkbox"/> CLAIMS MADE <input checked="" type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PROJECT <input type="checkbox"/> LOC <input type="checkbox"/> OTHER			6024686380	01/18/2018	01/18/2019	EACH OCCURRENCE	\$1,000,000.00
							DAMAGE TO RENTED PREMISES (Ea occurrence)	\$300,000.00
							MED EXP (Any one person)	\$10,000.00
							PERSONAL & ADV INJURY	\$1,000,000.00
							GENERAL AGGREGATE	\$2,000,000.00
							PRODUCTS - COMP/OP AGG	\$2,000,000.00
								\$
A	<b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY			6024686380	01/18/2018	01/18/2019	COMBINED SINGLE LIMIT (Ea accident)	\$1,000,000.00
							BODILY INJURY (Per person)	
							BODILY INJURY (Per accident)	
							PROPERTY DAMAGE (Per accident)	
	<input type="checkbox"/> UMBRELLA LIAB <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> OCCUR <input type="checkbox"/> CLAIMS-MADE						Each occurrence	
							Aggregate	
B	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIV OFFICER/MEMBER EXCLUDED? Y/N N (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	N/A		6025055403	12/12/2018	12/12/2019	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTHER	
							E.L. EACH ACCIDEN	\$1,000,000.00
							E.L. DISEASE - EA EMPLOYEE	\$1,000,000.00
							E.L. DISEASE - POLICY LIMIT	\$1,000,000.00
C A	Errors & Omissions, Cyber Liability  Property			EONGAF113209712-002  6024686380	01/18/2018  01/18/2018	01/18/2019  01/18/2019	\$ 1,000,000 per occ \$1,000,000 in agg  \$ 2000.00 BPP \$500 deductible	

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)  
 Evidence only

CERTIFICATE HOLDER

CANCELLATION

Evidence only	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.
	AUTHORIZED REPRESENTATIVE



Benevate, Inc  
dba Neighborly Software  
3423 Piedmont Rd NE, Suite 216  
Atlanta, GA - 30305

January 24, 2019

Patricio Avila II  
Assistant Director  
Hidalgo County - Urban County Program  
427 E. Duranta Ave.  
Alamo, TX 78516

Dear PR,

In compliance with Hidalgo County's request, this letter certifies that Benevate, Inc is the producer and sole source vendor of Neighborly Software's Housing, Economic and Community Development hosted software. Benevate further certifies that no other hosted software is available for purchase that can address all of Hidalgo County Urban County Program needs in one solution, including:

1. Automating the enrollment, qualification, administration and reporting for **ALL** of the Hidalgo County Urban County programs:
  - a) Housing Rehabilitation
  - b) Acquisition
  - c) Affordable Housing Development
  - d) Public Services (CDBG)
  - e) Homeless Services (ESG)
  - f) Down Payment Assistance
  - g) Public Facilities & Infrastructure
  - h) *...and most likely other programs within the department not listed above*
2. Enabling Hidalgo County to originate and administer deferred, forgivable and amortizing loans.
3. Providing an online participant portal that allows beneficiaries to apply for grant funding, view loan information, request loan payoff details and attest to ongoing program requirements.
4. Providing an online portal that allows sub-recipients to apply for grant funding, submit monthly accomplishment reports and make draw requests.



5. Providing an online portal that allows contractors to bid on construction projects, update their insurance/license information and make draw requests.
6. Enabling housing inspectors to complete HQS inspections and Work Write Ups from the "field" using a mobile tablet device.
7. Empowering Hidalgo County to track multiple funding sources (e.g. CDBG, HOME) across all housing and community development programs.
8. Allowing Hidalgo County to report the results of all housing and community development programs on a consolidated county map.

Benevate's solution is unique and market leading as evidence by the fact that thirty-seven of our forty public sector contracts have been limited bid/sole sourced. The lone exceptions were the City of Savannah, GA, City of Columbus, GA, and Orange County, FL. Out of those three lone exceptions, Benevate was the only bidder in the competitive Request for Proposal process and finally, the third was a limited request for only online application management services and we were selected out of several other respondents.

If you have additional questions regarding our software's functionality, please feel free to call me at (703) 864-7231.

Sincerely,

Jason Rusnak  
President, Benevate Inc

# CERTIFICATE OF INTERESTED PARTIES

FORM 1295

1 of 1

Complete Nos. 1 - 4 and 6 if there are interested parties.  
Complete Nos. 1, 2, 3, 5, and 6 if there are no interested parties.

## OFFICE USE ONLY CERTIFICATION OF FILING

1 Name of business entity filing form, and the city, state and country of the business entity's place of business.

Benevate Inc. (dba Neighborly Software)  
Atlanta, GA United States

Certificate Number:  
2019-504700

Date Filed:  
06/13/2019

Date Acknowledged:

2 Name of governmental entity or state agency that is a party to the contract for which the form is being filed.

Hidalgo County

3 Provide the identification number used by the governmental entity or state agency to track or identify the contract, and provide a description of the services, goods, or other property to be provided under the contract.

HCUCP2019\_NS

Housing, Economic, and Community Development Software specializing in the administration of HUD funds combining 5 much needed modules into one (Grants, Loans, Contractors, Online Bidding, Task, etc.).

4 Name of Interested Party	City, State, Country (place of business)	Nature of interest (check applicable)	
		Controlling	Intermediary
Behm, Chris	Atlanta, GA United States	X	
Rusnak, Jason	Atlanta, GA United States	X	

5 Check only if there is NO interested Party.

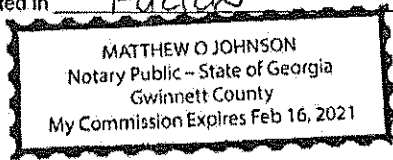
### 6 UNSWORN DECLARATION

My name is J. Jason Rusnak, and my date of birth is 8/27/1977.

My address is 3423 Piedmont Rd Suite 216, Atlanta, GA, 30305, USA.  
(street) (city) (state) (zip code) (country)

I declare under penalty of perjury that the foregoing is true and correct.

Executed in Fulton County, State of GA, on the 14 day of June, 2019.  
(month) (year)



J. Jason Rusnak  
Signature of authorized agent of contracting business entity  
(Declarant)

# CERTIFICATE OF INTERESTED PARTIES

FORM 1295

1 of 1

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 Complete Nos. 1, 2, 3, 5, and 6 if there are no interested parties.

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Benevate Inc. (dba Neighborly Software)  
 Atlanta, GA United States

Certificate Number:  
 2019-504700

Date Filed:  
 06/13/2019

2 Name of governmental entity or state agency that is a party to the contract for which the form is being filed.

Hidalgo County

Date Acknowledged:  
 06/26/2019

3 Provide the identification number used by the governmental entity or state agency to track or identify the contract, and provide a description of the services, goods, or other property to be provided under the contract.

HCUCP2019\_NS  
 Housing, Economic, and Community Development Software specializing in the administration of HUD funds combining 5 much needed modules into one (Grants, Loans, Contractors, Online Bidding, Task, etc.).

4	Name of Interested Party	City, State, Country (place of business)	Nature of interest (check applicable)	
			Controlling	Intermediary
	Behm, Chris	Atlanta, GA United States	X	
	Rusnak, Jason	Atlanta, GA United States	X	

5 Check only if there is NO Interested Party.

6 UNSWORN DECLARATION

My name is \_\_\_\_\_, and my date of birth is \_\_\_\_\_.

My address is \_\_\_\_\_ (street), \_\_\_\_\_ (city), \_\_\_\_\_ (state), \_\_\_\_\_ (zip code), \_\_\_\_\_ (country).

I declare under penalty of perjury that the foregoing is true and correct.

Executed in \_\_\_\_\_ County, State of \_\_\_\_\_, on the \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.  
 (month) (year)

\_\_\_\_\_  
 Signature of authorized agent of contracting business entity  
 (Declarant)