

REQUEST FOR PROPOSALS

STRATEGIC ASSET MANAGEMENT POLICY AND PLAN FOR PORT KC (Port Authority of Kansas City, Missouri)

Port KC (Port Authority of Kansas City, Missouri), a political subdivision of the State of Missouri created pursuant to Chapter 68, RSMo, requests submissions in response to this **REQUEST FOR PROPOSALS** from Real Estate firms and individual Consultants interested in providing Strategic Asset Management Planning services for Port KC owned assets (Exhibit A) under phase I. Additional phases might be added after completion of Strategic Asset Management Plan (“Plan”).

The purpose of this Request for Proposal (RFP) is to solicit proposals from consultants experienced in strategic asset management planning to lead staff through a long-range strategic planning process.

The goal of the plan is to create a strategic to tactical plan for “global” asset management of all property (non-conduit financed) in which Port KC owns. This plan should provide comprehensive guidelines for more efficient & effective use and management of Port KC’s property and assets.

The plan will be reviewed and evaluated considering the proposal that is most advantageous to Port KC in terms of price, submittal and qualifications.

SCOPE OF SERVICES

Respondents to this Request for Proposal must demonstrate that the real estate firm or individual has sufficient experience and qualifications to effectively accomplish the Scope of Services, generally described as follows:

A. The strategic objectives of the policy will look to achieve the following:

- I. Create specific guidelines for maintaining and optimizing Port KC assets
- II. Decision making process consistent with Port KC’s applicable policies and procedures
- III. Fair and equitable methods for prioritizing capital expenditures and ongoing expenses
- IV. Recognize existing relationships with current customers and their investment within the occupied premises

- V. Creation of a process for assembling, sharing and maintaining info related to acquisitions, disposition, development and maintenance of port assets.

B. The strategic asset management plan will also address the following:

- I. Portfolio management
- II. Classification of assets
- III. Property Management Goals
- IV. Real Property & Portfolio Strategies
 - a) Lease structuring
 - b) Standardization of leases
 - c) Generate maximum rental revenue possible
 - d) Insurance coverage- tracking renewals and per building allocations
 - e) Energy Management System:
 - i. Electrical
 - ii. HVAC
- V. Structuring and funding Capital Improvement Items
- VI. Property Performance Evaluation
- VII. Utilization of Port KC, City and State incentives
- VIII. Recommendation of Asset Management software
- IX. Market place position and comparables

It is expected that completion of the above-noted items will be approached in the following manner:

Evaluation of Current Practices Estimated Cost:(_____)

Working with staff and management, the Consultant will identify the current asset management practices, procedures, and tools in use, and identify strengths and weaknesses associated with these current practices.

Needs Assessment

Estimated Cost:(_____)

Working with staff and management, the Consultant will identify essential and ideal features of a strategic asset management strategy for Port KC Asset Management department in regard to maintaining, repairing, replacing and procuring assets. The needs assessment will take into consideration financial, operational, administrative, regulatory and strategic requirements.

Best Practices Overview

Estimated Cost:(_____)

Based on research, professional knowledge, and awareness of leading asset management practices in use in other comparable properties, the Consultant will provide an overview of best practices for asset management.

Gap Analysis

Estimated Cost:(_____)

The Consultant will identify gaps between current information, policies, practices and procedures, while also reviewing current and future departmental needs and best management practices.

Framework Synthesis

Estimated Cost:(_____)

The Consultant will consolidate the above information into a Strategic Asset Management Framework that:

- a) Demonstrates consistency with best practices for asset management;
- b) Addresses financial, operational, administrative, regulatory and strategic requirements on a departmental basis, and aggregated for the organization as a whole; and
- c) Establishes an approach that enables Port KC to make informed decisions about asset operations, maintenance, renewal, replacement and decommissioning based on full life cycle costs, risks and benefits.

Implementation Plan

Estimated Cost:(_____)

Prior to completing an appropriate Implementation Plan, Port KC will review the revised Strategic Asset Management Framework to determine its suitability to serve as the basis for an Implementation Plan and how to best implement the proposed Strategic Asset Management Framework across the organization. The Implementation Plan will include the following information:

Targeted Recommendations

Provide recommendations tailored to the Asset Management Department and to the organization as a whole to effectively implement targeted recommendations.

Tasks and Timelines

Provide tasks and timeliness for the Asset Management Department and the organization as a whole to effectively implement targeted recommendations.

Software Solutions

Provide recommendations for asset management software solutions and a rationale for each potential software solution. Compatibility with any existing software systems currently in use at Port KC should be considered.

SUBMISSION REQUIREMENTS

Real Estate firms and individual Consultants are strongly encouraged to thoroughly review this entire Request for Proposals because all submissions will be reviewed for compliance with the requirements set forth in it. To simplify the review process and permit the maximum degree of comparison by Port KC, Real Estate firms and individual Consultants must, at a minimum, provide the information described below in an outline that substantially conforms to the following:

1. Title Page

Indicate the Real Estate firms and individual Consultants complete legal name (and the name under which the Real Estate firms and individual Consultants are doing business if different from the legal name), form of legal entity (corporation, limited liability company, general or limited partnership or sole proprietorship, etc., if not evident from the legal name), local address, telephone number and facsimile number, contact person and title, and the date of the qualification submission.

2. Table of Contents

The table of contents must clearly identify the material included in the submission by section and page number.

3. Transmittal Letter

The Real Estate firms and individual Consultants must include a signed letter of transmittal briefly stating:

- That the Real Estate firms and individual Consultants understand the Scope of Services provided;

- A positive Commitment to perform the Scope of Services;
- Why the Real Estate firms and individual Consultants believes it is qualified to perform the Scope of Services; and
- The person signing the letter must indicate his or her title, and state that he or she is authorized to bind the Professional.

4. The Real Estate firms and individual Consultant's Profile

- State whether the Real Estate firms and individual Consultants are local, regional or national;
- State the location of the office from which the Services will be performed and the number of professional staff employed at that office;
- Provide a brief history of the Real Estate firms and individual Consultants;
- Indicate any past or present relationship of the Real Estate firms and individual Consultants to Port KC, listing the project(s) and the scope of the services provided to Port KC;
- Certify that the Real Estate firms and individual Consultants have no conflict of interest with regard to the Scope of Services to be provided pursuant to the Agreement for Professional Services contemplated by this Request for Qualifications;
- State whether the Real Estate firms and individual Consultants have an affirmative action plan; if so, a copy must be attached; and
- Certify that the Real Estate firms and individual Consultants will obtain and maintain insurance at required levels.

5. The Real Estate firms and individual Consultant's Qualifications

- Provide a list of key permanent staff members of the Real Estate firms and individual Consultants including names, job descriptions, titles, relevant educational and professional experience, certifications and/or licenses;
- List all Real Estate firms and individual Consultant's subcontractors (if any) expected to be involved in the completion of the Scope of Services specified in this Request for Proposals, including the name(s), relationship, relevant staff and experience of any such subcontractors;

- Provide a list of project deliverables to be created with a detailed timeline for each deliverable and overall project completion;
- Provide a list of professional references;
- Example(s) of a finished strategic asset management plan created by your company. Strategic asset management plan should reflect as many possible sections of the scope of services stated above (page 1) including project description, services rendered, project time frame, and value added;

6. Overall Strategic Asset Management Plan and Implementation Costs
(totalled from page 2 and 3)

Provide consolidated cost estimates for an integrated asset management strategy (to the most accurate class of estimate practical) to ensure the proposed Strategic Asset Management Framework remains integral to the organization-wide financial, operational and strategic planning initiatives; and

7. Describe all violations/citations and pending litigation which involve the Real Estate firms and individual Consultants and/or its principals.

Port KC will negotiate and enter into a contract (“Agreement for Professional Services”) with the qualified Real Estate firms and individual Consultants it selects (“Selected Real Estate firms and individual Consultants”) for the Scope of Services to be performed, and the timeframe in which the Scope of Services are to be completed.

All submissions will be evaluated based on their completeness, the Real Estate firms and individual Consultants’ experience and capacity to perform the Scope of Services, the Real Estate firms and individual Consultants’ past record of performance for Port KC and the Real Estate firms and individual Consultants ’s familiarity with the Kansas City, Missouri (“City”) area.

Port KC encourages participation by Real Estate firms and individual Consultants that have been certified as a Women’s Business Enterprise (“WBE”) or Minority Business Enterprise (“MBE”) by the City’s Human Relations Department and encourages MBEs and WBEs to become certified with the City’s Human Relations Department. The Selected Real Estate firms and individual Consultants may be required to set goals for the potential utilization of MBEs/WBEs on the Project (“Utilization Goals”) and to develop a utilization plan that will support the Utilization Goals.

Upon request, the Selected Real Estate firms and individual Consultants will furnish to Port KC letters from the City’s Commissioner of Revenue that

the Selected Real Estate firms and individual Consultants, its contractors and subcontractors, are in compliance with the license and tax ordinances administered by the Revenue Division of the City's Finance Department, including, but not limited to, the City's earnings and occupational license taxes.

SCHEDULE FOR REQUEST FOR QUALIFICATION

Request for Proposals will be available at 9:00 a.m., CDT on Monday, December 12th, 2016 on Port KC's web site.

The deadline for submission of responses to this Request for Proposals will be **1:00 p.m., CST on Thursday, January 19th, 2017.**

Three (3) bound copies of the Real Estate firms and individual consultant's response to this Request for Proposal should be submitted.

All submissions should be made to the following:

Port KC
Attn: Marissa Cleaver Wamble
300 Wyandotte, Suite 100
Kansas City, Missouri 64105

Any questions regarding the Request for Proposal packet should be submitted to info@portkc.com. Questions will be accepted through Monday, January 16th at 5 p.m. CST.

[All questions and answers will be posted at http://portkc.com/rfpsrfqs/.](http://portkc.com/rfpsrfqs/)

Port KC reserves the right to reject any and all submissions.

Exhibit A

Richards-Gebaur Commerce Park

Port KC oversees and manages more than 489,000 square feet of leased office and industrial space. Current tenants in the Richards-Gebaur Commerce Park include:



- PM Contracting, Inc
- ISSCO Inc.
- Schneider National
- Metropolitan Community Colleges
- Jarden Consumer Solutions

Tenants enjoy easy access to major highways and interstates including I-49, the benefits of a foreign trade zone, and Class I freight rail service from Kansas City Southern.

For more information, about Richards-Gebaur Commerce Park and/or Port KC visit <http://portkc.com/>