



**PROSPER**  
**PORTLAND**  
Building an Equitable Economy

**REQUEST FOR PROPOSALS #17-12**  
**PROJECT MANAGEMENT SERVICES FOR**  
**ASSET MANAGEMENT SAAS IMPLEMENTATION**

Proposals Due: November 9, 2017 by 2:00 PM (Pacific)

**1.0 REQUEST FOR PROPOSALS SUMMARY**

Through this Request for Proposals (this “RFP”), the **Portland Development Commission d/b/a Prosper Portland** (“Prosper Portland”), the economic development and urban renewal agency for the City of Portland, Oregon, requests competitive proposals from qualified and experienced individuals, firms, or teams (“Proposers” or “you(r)”) for the provision of project management services for the implementation of an asset management SAAS system at Prosper Portland.

**2.0 CONTACT AND PROPOSAL DELIVERY INFORMATION**

Direct all questions and deliver **ONE (1) SIGNED ADOBE ACROBAT VERSION (.PDF) OF YOUR PROPOSAL BY EMAIL** to the “Solicitation Coordinator” named here:

Solicitation Coordinator*	Proposal Delivery Location
Kelly Hartle, Procurement Services Coordinator 503-823-3298 HartleK@prosperportland.us	<b>Email to:</b> HartleK@prosperportland.us <b>Subject Line:</b> “Response to RFP 17-12”

\* The Solicitation Coordinator named here is Prosper Portland’s **SOLE POINT OF CONTACT** for this RFP.

**3.0 PROCUREMENT SCHEDULE**

Prosper Portland reserves the right to change this schedule for any reason.

Procurement Activity	Date
Request for Proposals Issued	October 31, 2017
Deadline for Questions	November 6, 2017
<b>Proposal Due Date and Time**</b>	<b>NOVEMBER 9, 2017, BY 2:00 PM (PACIFIC)</b>
Evaluation Period, Ending ( <i>tentative</i> )	November 17, 2017
Contract Effective Date ( <i>anticipated</i> )	December 1, 2017

\*\* To be considered for award of the contract, proposals must be received by the Solicitation Coordinator **no later than** the date and time listed here.

#### **4.0 PROJECT BACKGROUND**

Prosper Portland has determined that its existing system of property and asset management is insufficient for its needs based on the agency's strategic refocus from a disposition-only strategy to an active portfolio management approach that includes many operating assets to be held for long term income. This shift necessitates a new suite of tools in order to effectively manage the portfolio. As such, Prosper Portland has selected Yardi Systems (via competitive RFP) to provide this software, specifically Yardi Voyager 7S SAAS and Advanced Budgeting & Forecasting modules. Through this RFP, Prosper Portland is soliciting offers from qualified individuals or firms to provide IT project management services for the implementation of this new system.

#### **5.0 WORK REQUIREMENTS**

The work performed by the successful Proposer (the "Contractor") under the contract awarded from this RFP (the "Contract") will be to provide highly-skilled project management services beginning with the planning phase of the project, through the duration of the project, and until successful close out.

The role of Contractor is to plan, execute, monitor, control, and close the project according to defined objectives and overall project management best practices, which includes identifying needed project resources, coordinating the efforts of team members, and reporting to the executive sponsor in order to deliver the project on time and within budget. This includes management of project scope, schedule, budget, change control, issues and risk management.

Contractor will work collaboratively with appropriate Prosper Portland business users, stakeholders and the executive sponsor in order to properly define the overall project. Additionally, Consultant will be expected to introduce and manage quality control throughout the project's life cycle.

Key services and deliverables (or "Work Products") Contractor will provide Prosper Portland under the Contract include:

- a. Develop, in consultation with end users, project charter, project plan, refining objectives, scope, assumptions, risks, schedule, success criteria and deliverables.
- b. Ensure on-time, on-budget completion of project and success criteria.
- c. Develop and drive detailed project work plans and milestones.
- d. Provide advice and consultation to Prosper Portland executive sponsor about appropriate staffing and resources required for the project.
- e. Manage day-to-day activities of project team.
- f. Act as Prosper Portland's project advocate within Prosper Portland to the extent practicable and at the discretion of the executive sponsor.
- g. Perform issues management and resolve or escalate issues in a timely manner.
- h. Manage scope control and change management activities as necessary.
- i. Monitor risk and advise the executive sponsor as necessary.
- j. Manage communication within the project team.
- k. Develop and deliver periodic project status reports, presentations and related project documentation to the project team and executive sponsor.

Prosper Portland reserves the right to modify, add, and/or remove certain tasks and activities prior to Contract execution; or through equitable amendment to the Contract, after Contract execution.

## 6.0 QUALIFICATIONS

The successful Proposer will have demonstrated experience with Yardi Systems Voyager 7S (mandatory requirement).

Desired qualifications of successful Proposer key individual staff include:

- a. A minimum of six (6) years project management experience, preferably Information Technology projects or other relevant experience.
- b. A Project Management Professional certification from the Project Management Institute.
- c. B.A. or B.S. degree.
- d. Demonstrated experience with Microsoft Dynamics AX or interfacing with other financial systems.
- e. Experience with Yardi's Advanced Budgeting and Forecasting Module.

## 7.0 SUBMITTAL REQUIREMENTS AND EVALUATION CRITERIA

Proposals submitted in response to this RFP will be evaluated by comparing the quality, completeness, and competitiveness of your proposal with the following Submittal Requirements and Evaluation Criteria. Please organize your proposal in the order of the sections below.

**Page Limit.** Excluding the title page, cover letter and pricing information, please keep your proposal to no more than **six (6)** pages in length. For purposes of this RFP, each side of a piece of paper is considered one page.

NOTE: Proposers may propose up to three (3) different key personnel in their response.

### 7.1 Cover Letter

Maximum Points Allotted for this Criterion: **Not Scored**

In a one page cover letter, provide a summary of your proposal. In this cover letter, also include the name, mailing address, phone and fax numbers, and email address of your primary point of contact for this RFP. Specifically address your experience with Yardi systems in the cover letter. The cover letter will be signed by a representative of the Proposer authorized to make a binding offer to Prosper Portland.

### 7.2 Qualifications and Experience of Firm and Personnel

Maximum Points Allotted for this Criterion: **45**

Provide a description of your firm's and personnel's experience in providing services similar to those described in this RFP. For this section also include:

- General scope of services your firm provides and number of years your firm has been providing the types of services listed in Section 5 of this RFP.
- A short profile of the key individual proposed to perform work under the Contract, including their education, work history and pertinent professional qualifications and certifications. Personnel résumés may be used in lieu of personnel profile(s), but are not required.

- Brief description of similar projects performed in the past three (3) years that best characterize your firm’s capabilities.
- List three (3) current or past references using projects of similar scale scope as described in this RFP. For each reference, include the reference’s company name, contact person, phone number, email address, and a description of the services provided for that reference. References may be checked at Prosper Portland’s discretion.

**7.3 Project Approach and Understanding**

Maximum Points Allotted for this Criterion: **15**

Provide a clear and concise description of your understanding of Prosper Portland’s needs and the approach you propose to complete the work described in this RFP, including (1) specific personnel assigned to perform the tasks; (2) approximate timeframe to perform and complete the work, highlighting milestones; (3) type of Work Products produced; (4) whether you can fulfill the performance schedule listed in Section 6 of this RFP; and (5) any recommended deviations from the Work Requirements listed in Section 5.

**7.4 Promotion of Certified Firms**

Maximum Points Allotted for this Criterion: **15**

Prosper Portland is committed to increasing contracting and subcontracting opportunities for State of Oregon certified disadvantaged, minority-owned, women-owned, and emerging small business enterprises (collectively, “Certified Firms”) in order to promote their growth, capacity-building, and economic success of these businesses. As part of your response to this RFP, address the following:

- **Certification Status.** Is your firm currently a Certified Firm or has your firm recently applied for certification with the State of Oregon’s Certification Office of Business Inclusion and Diversity (“COBID”)?
- **Subcontracting Plan.** Do you intent to subcontract any element of the work described in this RFP? If so, provide the following information (a) the name(s) of the Certified Firms(s) and (b) the aspects of the work that will be subcontracted to Certified Firm(s)
- **Past Experience.** Have you subcontracted or partnered with any Certified Firm(s) on any project(s) within the past thirty-six (36) months? If so, indicate both the project(s) and the role of the Certified Firm(s) on the project(s)?

**7.5 Price Proposal**

Maximum Points Allotted for this Criterion: **25**

Propose the **total estimated cost** to effectively complete the work and requirements described in the Statement of Work section this RFP. The total estimated cost must include:

- **Hourly rates of each personnel** assigned to perform work under the Contract as well as the **estimated number of hours** each personnel will be expected to complete each task. A RANGE OF HOURLY RATES IS NOT ACCEPTABLE.

- Any direct or indirect **reimbursable expenses**, including travel expenses, and any other expenses necessary to complete the work. State whether reimbursable expenses will be billed at direct cost or at cost plus a mark-up percentage.

All unspecified costs will be borne by Contractor.

## 8.0 CONTRACT REQUIREMENTS

- 8.1 **Form of Agreement.** The Proposer selected to perform the work described in this RFP will be invited to enter into a Personal Services Contract (the “Contract”) with Prosper Portland. The terms and conditions that will govern the Contract can be found in on Prosper Portland’s website [\[link\]](#). PROPOSERS WHO PROPOSE CHANGES TO ANY CONTRACT TERM OR CONDITION MUST INCLUDE THEIR PROPOSED CHANGES IN THEIR PROPOSAL; HOWEVER PROSPER PORTLAND IS UNDER NO OBLIGATION TO ACCEPT ANY SUCH PROPOSED CHANGES. The Contract will become effective upon execution by both parties.
- 8.2 **Compensation and Payment.** The “Not to Exceed” value of the Contract will be based on the sum of all proposed costs including reimbursable expenses. Contractor’s personnel and reimbursable expenses, up to the Not to Exceed amount, will be payable on the basis of the Contractor’ time and materials. Prosper Portland PAYMENT TERMS: NET 30 DAYS.
- 8.3 **Contract Term.** The initial term of the Contract will be for a period of seven (7) months, ending June 30, 2018, which may be extended upon the mutual written agreement between the parties to the Contract. Contractor should anticipate, however, that Prosper Portland is hopeful to complete the project sooner and the contract may not last the entire seven (7) months.
- 8.4 **Intentionally Omitted.**
- 8.5 **Contract Compliance.** The Contractor must comply with the following before Prosper Portland will execute any Contract with that firm:
- Be a legal entity that has the authority to [transact business in the State of Oregon](http://www.filinginoregon.com/business/index.htm) <<http://www.filinginoregon.com/business/index.htm>>
  - [Be certified as an Equal Employment Opportunity \(EEO\) employer](http://www.portlandonline.com/omf/index.cfm?&c=45665) through the City of Portland <<http://www.portlandonline.com/omf/index.cfm?&c=45665>>
  - Provide insurance documents consistent with the requirements listed below.
- The conditions in this section apply only to the successful Proposer and are not a condition to submit a proposal in response to this RFP.
- 8.6 **Insurance Requirements.** Prior to execution of the contract, Contractor must furnish Prosper Portland with proof of the following types of insurance:
- **Workers' Compensation Insurance** in compliance with ORS 656.017, which requires subject employers to provide workers’ compensation coverage for all their subject workers, unless exempt under ORS 656.027.

- **Commercial General Liability (CGL)** insurance provided on an occurrence basis with a combined single limit of not less than **\$1,000,000** each occurrence, **\$2,000,000** general aggregate. Contractor shall endorse the following as an additional insured on the CGL policy: **“The Portland Development Commission, the City of Portland, and each of their respective officers, agents, and employees.”**
- **Automobile Liability** with a combined single limit of not less than **\$1,000,000**, each accident, covering all owned, non-owned, or hired vehicles. If Contractor does not own any automobiles, Contractor agrees to maintain coverage for hired and non-owned automobiles.

8.7 **Insurance Certificates.** As evidence of coverage and prior to execution of the Contract, the Contractor must provide certificates of insurance to Prosper Portland listing the Portland Development Commission at 222 NW 5th Avenue; Portland, OR 97209 as a certificate holder. The certificate should be sent to the attention of the Solicitation Coordinator identified in Section 2.0 of this RFP. Insuring companies or entities are subject to Prosper Portland’s acceptance and must be licensed to provide insurance in the state of Oregon. Contractor’s insurance shall be primary insurance, and any commercial insurance or self-insurance maintained by the City of Portland and/or Prosper Portland shall not contribute to it.

## 9.0 GENERAL CONDITIONS OF THIS RFP

All proposals submitted in response to this RFP are subject to the conditions and requirements contained within this RFP. All matters not specifically addressed in this RFP or the Contract, will be governed by Prosper Portland’s Local Contract Review Board Administrative Rules as well as applicable Oregon Revised Statutes and other rules pertaining to procurement and contracting at Prosper Portland.

- 9.1 **Proposal Preparation and Submission Instructions.** You must email your proposal to the Solicitation Coordinator identified in Section 2 of this RFP no later than the “Proposal Due Date and Time” listed in Section 3. Your proposals must be typewritten, formatted for printing on 8.5” x 11” paper, in no less than 11-point font, and should not exceed a file size of four megabytes (4 MB). You are encouraged to follow-up with a phone call to the Solicitation Coordinator if receipt of your proposal was not confirmed prior to the time proposals are due. **IN NO CASE WILL PROSPER PORTLAND BE LIABLE FOR ANY LOST, LATE, OR UNDELIVERABLE PROPOSALS.**
- 9.2 **Preparation Costs.** Prosper Portland is not responsible for any costs you might incur in the preparation or submission of a proposal for this RFP.
- 9.3 **Questions and Changes to this RFP.** Any requests for clarification or change to any matter contained in this RFP must be submitted by email to the Solicitation Coordinator listed in Section 2 of this RFP no less than five (5) business days prior to the date proposals are due. Any material change or clarification of any matter contained in this RFP will be issued in the form of a written Addendum to this RFP. Oral comments offered by Prosper Portland staff will not modify this RFP in any way.

- 9.4 **Public Records and Disclosure.** All proposals submitted in response to this RFP will become the property of Prosper Portland and will be subject to public disclosure pursuant to Oregon Public Records Law (ORS 192), except those portions of proposals that are clearly marked as exempt from ORS 192. Any such portion of a proposal must (1) meet the requirements of ORS 192.501(2), (2) be clearly marked as “Confidential,” and (3) be easily separable from the rest of the proposal to facilitate public review of the non-confidential portions of the proposal. IF THE ENTIRE PROPOSAL IS MARKED “CONFIDENTIAL” OR “PROPRIETARY,” THE PROPOSAL WILL NOT BE DEEMED TO HAVE BEEN SUBMITTED IN CONFIDENCE.
- 9.5 **Method of Evaluation.** All responsive proposals will be reviewed and scored by an evaluation committee. Using the Evaluation Criteria listed in Section 7 of this RFP, evaluators will use their judgment to score the qualifications of the proposed personnel per section 6.0 above, competitiveness of cost, and other factors referenced in Section 7.0 of this RFP. Prosper Portland will then add individual committee members’ scores to produce an initial ranking. The highest-ranked Proposer(s) will be considered the finalist Proposer(s).
- 9.6 **Selection Process and Award Notice.** At Prosper Portland’s option, formal interviews with the Finalist Proposer(s) may be part of the evaluation process of this RFP. If interviews are not conducted, Prosper Portland will award the Contract to the highest-ranked responsive Proposer. If two or more finalists are interviewed, Prosper Portland reserves the right to either re-score the finalists’ proposals or use the original scores solely as the basis to determine the list of finalists and re-rank the proposals based on the combined strength of the finalists’ proposal and interview.
- 9.7 **Consent of Terms.** By submitting a proposal in response to this RFP, you: (1) agree to make your proposal a binding offer to Prosper Portland for a period of sixty (60) calendar days after the date proposals are due; (2) have read, understand, and agree to be bound by all work requirements (Section 5), contract requirements (Section 8), RFP general conditions (this Section 9), and contract terms and conditions (Section 8) contained in this RFP (including any addenda issued for this RFP); and (3) and that the information provided in your proposal is true and accurate.
- 9.8 **Reservation of Rights.** Prosper Portland, in its sole discretion, reserves the right to change, extend the deadline or cancel this RFP; to reject any or all proposals received in response to this RFP; to decide whether a proposal does or does not substantially comply with the requirements of this RFP; to waive any minor informality of a proposal; to obtain references regarding any Proposer’s past performance from any source; and to negotiate the terms, pricing, and requirements of a Contract with the successful Proposer. Neither issuance of this RFP nor evaluation of proposals obligates Prosper Portland to award a contract from this RFP.

**END OF THIS RFP**