



PROSPER
PORTLAND

Building an Equitable Economy

REQUEST FOR PROPOSALS #16-18

ASSET MANAGEMENT SOFTWARE AND IMPELENTATION SERVICES

Proposals Due: July 12, 2017
by 2:00 PM (Pacific)

Direct all questions and submit one (1) signed hardcopy proposal and one (1) electronic proposal (on USB flash drive or CD-R) to Prosper Portland's SOLE POINT OF CONTACT for this RFP:

Kelly Hartle
Procurement Services Coordinator
Prosper Portland

222 NW Fifth Avenue
Portland, Oregon 97209
(503) 823-3298

HartleK@prosperportland.us (email)
<http://www.prosperportland.us> (www)

Prosper Portland highly encourages the participation of certified minority-owned, women-owned, disadvantaged, and emerging small businesses in this contract opportunity.

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1.0 REQUEST FOR PROPOSALS SUMMARY AND SCHEDULE

1.1 REQUEST FOR PROPOSALS DATA AND CONTACT INFORMATION

Request for Proposals Title: Asset Management Software
Solicitation Number: RFP #16-18
Solicitation Coordinator: Kelly Hartle, Procurement Services Coordinator
Contact Information: (503) 823-3298 (direct)
HartleK@prosperportland.us
Proposal Delivery Location: Prosper Portland
Attn: Kelly Hartle, Professional Services
222 NW 5th Avenue
Portland, OR 97209

1.2 SUMMARY

Through this Request for Proposals (this “RFP”), the Portland Development Commission d/b/a Prosper Portland (“Prosper Portland” or “we”), the economic development and urban renewal agency for the City of Portland, Oregon, requests competitive proposals for a hosted software solution, including implementation services, to enable real estate and property portfolio management, modeling, and analytics to support the Prosper Portland Business Model.

1.3 SCHEDULE OF SOLICITATION and CONTRACT AWARD EVENTS

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

Solicitation or Contract Award Event	Date
Request for Proposals Issued	June 19, 2017
Pre-Proposal Meeting	Not Applicable
Deadline for Questions and Requests for Changes*	June 29, 2017
PROPOSAL DUE DATE AND TIME (no later than)	JULY 12, 2017 by 2:00 PM (Pacific Time)
Finalist Product Demonstrations (<i>tentative</i>)	July 19 – 21, 2017
Notice of Intent to Award, Issued (<i>tentative</i>)	July 25, 2017
Deadline for Protest of Intent to Award	Seven (7) calendar days after Notice of Intent to Award is issued
Contract Execution and Start of Implementation	August 2017

* Prosper Portland may make a courtesy effort to contact interested parties that this schedule has changed, but interested parties are ultimately responsible for being aware of changes to this RFP by regularly checking the appropriate RFP folder on Prosper Portland’s website at www.prosperportland.us/bids (under “Open Public Bid Opportunities”).

2.0 PROSPER PORTLAND AND PROJECT BACKGROUND

2.1 ABOUT PROSPER PORTLAND

Created by Portland voters in 1958, Prosper Portland is the economic and urban development agency for the city of Portland. We focus on building an equitable economy by carrying out a comprehensive range of economic development programs that supports small businesses, improves access to workforce training, and creates jobs for Portland residents. We work with partners to drive public attention and resources to different areas of the city which helps Portland realize capital projects – parks, streetscape improvements, community centers – that would not happen on their own, making the city a better place to live for all Portlanders.

Our work is based on four cornerstones:

- ❖ Growing family-wage jobs
- ❖ Advancing opportunities for prosperity
- ❖ Collaborating with partners for an equitable city, and
- ❖ Creating vibrant neighborhoods and communities.

We support innovative civic solutions that promote mixed-income neighborhoods with both affordable and workforce housing, and that evolve in ways that honor cultural diversity. We prioritize property ownership and real estate projects with communities of color and in low-income neighborhoods to create assets that can be passed from one generation to the next.

View our website at <http://www.prosperportland.us>

2.2 ABOUT THE PROJECT

An underlying assumption of Prosper Portland’s Business Plan (Business Plan) is that the agency’s real estate portfolio will be used to create a long-term, sustainable revenue stream. This strategy includes not only the management of properties Prosper Portland currently owns, but the acquisition and development of properties that will help Prosper Portland in reaching this goal. Our portfolio consists of approximately 54 multi-family units, +/-200,000 square feet of commercial space, a 92 unit hotel, +/-194,000 square feet of industrial space, nine parking facilities totaling 912 parking stalls, as well as a significant quantity of unimproved land held for future development. In order to manage Prosper Portland’s assets to the level expected in the Business Plan, we must invest in tools that will allow the agency to improve lease management, value engineer operating costs, perform modeling and sensitivity analysis on current and proposed real estate assets, and support budgeting and reporting functions.

Currently the asset management team uses spreadsheets to manage properties and track income/expenses and an Access database to track property contracts and leases.

Prosper Portland is issuing this RFP to select an asset management software system and its related installation, configuration, implementation, and training services to increase the agency’s efficiency and provide better management information for the organization’s leadership.

2.3 RESOURCES PROVIDED BY PROSPER PORTLAND

For project oversight, Prosper Portland will assign an Executive Sponsor for project execution, a dedicated Project Manager to the effort, and will also have subject matter experts assigned on an as-needed basis.

3.0 SYSTEM REQUIREMENTS

This section describes Prosper Portland’s system requirements. If selected from this RFP, the Vendor must provide, configure, and implement a fully-functional asset management system (the “Software”).

3.1 GENERAL REQUIREMENTS

Prosper Portland requires the proposed Software solution be a commercial-off-the-shelf product delivered as software as a service (“SaaS”) through the internet. The Software should require only limited customization to implement and maintain.

3.2 LICENSING REQUIREMENTS

The proposed Software must include all software and licenses required to operate. Software licensing requirements will be dependent upon the licensing model of the selected solution. For the purposes of this RFP, software licenses will be required to support the following users and environments:

- Asset and property management clients: three (3)
- Administrators: one (1)
- Finance clients: one (1)

3.3 SOFTWARE FEATURES

The proposed system should include or provide:

- Robust valuation ‘suite’ with the ability to perform discounted cash flow (“DCF”), easily manipulate components such as the cap rate, discount rates, lease and vacancy assumptions, operating expense annual escalations, annual rent escalations; and to calculate net present value (“NPV”), cash on cash return, and internal rate of return (“IRR”).
- Detailed, easy to read, and visually appealing reporting capabilities for both property-level and portfolio-level performance.
- The ability to create ‘hypothetical’ models for potential acquisitions, dispositions, and developments and view impact on portfolio-level performance without overwriting existing ‘in-place’ operating information.
- Track actual income and expenses on an individual property level (including the ability to break out individual tenants), compare historical to actual income and expense levels, and forecast income and expenses.
- Robust lease administration tools including the ability to track key lease terms and maintain property level rent rolls.
- Analyze individual proposed lease transactions against budgeted returns.

- Track payables and receivables by property, tenant, and vendor.
- Track critical dates, such as lease expirations, rent escalations, and insurance expirations.
- Calculate prorated common area maintenance (“CAM”) expenses/charges.
- Track leases, amendments, and options.
- Calculate loan debt service and impact on cash flow, including variables such as loan amount, fees, interest rate, prepayment penalties, loan term, and amortization period
- Build pro-formas and perform sensitivity analysis on properties currently in portfolio as well as future investments.
- Create capital improvement budgets and distinguish between operating and capital expenses.
- Create a dashboard that allows Prosper Portland’s Leadership Team to obtain portfolio information easily and efficiently, as well as staff to share information easily with Board of Commissioners and other stakeholders.
- Data import/export functionality for integration into external systems.

3.4 OPTIONAL FEATURES

Ideally, the Software should also include:

- Document management functionality, including the ability to import and associate external documents (e.g., Adobe Acrobat, Microsoft Excel) with asset information.
- Access for mobile/tablet devices.
- Capabilities for future ‘add-ons’ in construction management, payment processing, work order management, and other related functions.
- Track appraised values.
- A means to test our configuration and use of the Software outside of the Production environment during and/or after go-live.

4.0 IMPLEMENTATION SERVICES

Selected Vendor must also provide all services (the “Services”) listed below. In their pricing, Proposers must include all system configuration, installation, testing, and training costs associated with all elements of the proposed Software.

4.1 IMPLEMENTATION COORDINATION

Vendor shall:

- 4.1.1 Provide Prosper Portland with a solution design document to include all licensed modules, functionality, and configuration.
- 4.1.2 Coordinate the implementation of the Software with Prosper Portland’s Project Manager on an agreed-upon project schedule.

- 4.1.3 Configure the Software as needed.
- 4.1.4 Track, resolve, and/or escalate issues in a timely manner.

4.2 END-USER DOCUMENTATION

Vendor shall provide documentation on the Software; e.g., those manuals, technical documents, or other written guidance or instructions that are customarily provided to Vendor's customers.

4.3 TRAINING

Prosper Portland's ability to utilize the Software quickly and efficiently is of paramount importance. As part of their proposals, Proposers should recommend training options available to Prosper Portland that would allow Prosper Portland staff to support and utilize the Software most effectively. This training must be Vendor-led training sessions at Prosper Portland's offices in Portland, Oregon though some classes may be provided in an online classroom setting or self-directed online training.

5.0 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 Evaluation Criteria and the needs of Prosper Portland. To facilitate evaluation, include a "Table of Contents" and organize your proposal in the order of the sections below.

5.1 COVER LETTER

Provide a summary of your proposal in a one or two-page cover letter. This cover letter should include the following:

- A brief history of your firm and the Software (including product name and version number) your firm proposes to provide Prosper Portland
- The name, mailing address, phone number, and email address of your primary point of contact for this RFP

5.2 VENDOR QUALIFICATIONS

Respond to the following in **five (5) pages or less**.

- Number of years Proposer's firm has been in operation and number of years Proposer's firm has been providing and implementing the Software described in Section 3 above.
- Provide an overview of your firm's personnel infrastructure and capacity to provide ongoing maintenance for the proposed product(s).
- **References.** Provide the following for at least three (3) successful implementations of your proposed product in the past three years. These implementations should be for organization similar to Prosper Portland (e.g. approximately 100 employees, public sector, etc.):
 - Company name
 - Product(s) implemented
 - Contact Person (including name, phone number, and email address)

References may or may not be checked at Prosper Portland's discretion.

- Disclose any and all judgments, pending or expected litigation or other real or potential financial reversals that might materially affect the viability or stability of the proposing organization or warrant that no such conditions exist.

Prosper Portland reserves the right to use any information or reference we may discover, including information based upon our own experience, in evaluating any proposal.

5.3 PRODUCT MATRIX

Complete Exhibit B of this RFP.

5.4 IMPLEMENTATION PROPOSAL

Propose the process and timeline to implement the Software. This should include:

- Time frame estimated to complete the implementation, highlighting any key milestones;
- Types of knowledge and skills and amount of Prosper Portland staff resources you recommend are necessary to complete the implementation; and
- A menu of available trainings options from which Prosper Portland may choose (see section 4.3 above).

Proposer should assume implementation should begin in August 2017 or shortly thereafter.

5.5 SOFTWARE SUPPORT

Describe what types of technical and end-user support that will be available to Prosper Portland through the life of the Software, including:

- Days/hours/time zone(s) of telephone and email support. Who provides these services?
- Detail any web-based support options that are available.
- Does the Software manufacturer maintain a user forum and/or listserv? If so, please state the web address(es).
- Describe how users are notified of software bugs and what steps the vendor normally takes to resolve software bugs.
- Describe the timing, procedures, and process for Software upgrades. What is the typical upgrade cycle?

5.6 PRICE PROPOSAL

5.6.1 **Subscription Costs.** Provide a detailed fixed price quote for the Software for a one-year, three-year, and five-year subscription term. If you are proposing more than one product/module, you may also submit a bundled cost in addition to the separate individual costs. Explain how subscription fees are calculated (e.g. per user, per year, etc.), if there are any quantity price breaks, and if software upgrades are included in the annual subscription cost or if there are any special upgrade costs.

5.6.2 **Implementation Fees.** Quote the price for implementing the Software, including any optional one-time costs. Also identify any reimbursable expenses (e.g., travel to/from Portland, Oregon) that are proposed.

5.6.3 **General Pricing Instructions.** While quoting the costs for the Software and Services, Proposer must observe the pricing instructions:

- All one-time and recurring costs and underlying assumptions must be clearly and fully disclosed.
- If any defined requirement has implications on licensing, ensure these are identified and included in the proposal.
- To the extent possible, ranges of fees or rates are discouraged. Pricing should be firm to the extent that requirements are clear.
- Regarding travel expenses, Proposers should note that Prosper Portland is a public entity that is operating with limited budget. Prosper Portland also has a policy on out-of-travel that restricts Prosper Portland’s employees, consultants, and contractors to travel in the most efficient and cost-effective manner. Proposers’ travel expenses should be estimated with this in mind. A copy of this policy is available upon request.
- Proposed product Software and Service costs will be compared to pricing proposed by competing firms and compared with information regarding current market costs for comparable services.

5.6.4 **Adjustments of Contract Pricing.** Unless otherwise agreed, annual adjustment of contract pricing will be considered upon written request from the Vendor to Prosper Portland. Please describe how you contract pricing is typically adjusted.

- Do you typically increase prices in the first three years of the Software licensing? Or are multi-year agreements possible to minimize cost increases?
- How frequently do costs for your product typically escalate?
- Is there a typical percentage that these costs typically escalate?

5.7 CONTRACT FORMS

Please include your standard end-user license and support/maintenance agreements. Proposers should note that Prosper Portland is a public entity in Oregon and is subject to certain statutory requirements (e.g., tort claim limits, public records law) and will need to negotiate with the successful proposer on agreement terms that are acceptable to Prosper Portland.

5.8 PROPOSER CERTIFICATION

Complete and return EXHIBIT A of this RFP, the “Proposer Certification,” with your proposal.

SUMMARY OF SUBMITTAL REQUIREMENTS AND EVALUATION CRITERIA FOR THIS RFP	
EVALUATION CRITERIA (SCORED)	MAXIMUM POINTS
➤ Vendor Qualifications	10 Points
➤ Product Matrix (Exhibit B)	50 Points
➤ Implementation Proposal	10 Points
➤ Software Support	10 Points
➤ Price Proposal	20 Points
Total Available Points	100 Points

NON-SCORED SUBMITTAL REQUIREMENTS

➤ Cover Letter	Not Scored
➤ Contract Sample	Not Scored
➤ Proposer Certification (Exhibit A)	Not Scored

6.1 CONTRACT REQUIREMENTS

6.1 COMPLIANCE AND INSURANCE REQUIREMENTS

Consultant must comply with the following before Prosper Portland will execute the Contract with that firm:

- 6.1.1 **Authority to Transact in Business in Oregon.** Be a legal entity that has the authority to transact business in the state of Oregon.
- 6.1.2 **Portland Business License.** Obtain a city of Portland Business License.
- 6.1.3 **Equal Employment Opportunity (EEO).** Certify as an EEO employer.
- 6.1.4 **Insurance Requirement.** See the following section.

Fulfilling the requirements listed in this section is not a condition to respond to this RFP and apply only to the selected Proposer.

6.2 INSURANCE REQUIREMENTS

At all times during the term of the Contract, Consultant shall maintain, on a primary basis and at its sole expense, the following insurance:

- 6.2.1 **Workers' Compensation** insurance in compliance with ORS 656.017, which requires subject employers to provide workers' compensation coverage for their subject workers, unless exempt under ORS 656.027.
- 6.2.2 **General Liability (GL)** insurance on an occurrence basis with a combined single limit of not less than **\$1,000,000** each occurrence, **\$2,000,000** general aggregate. This insurance shall include personal injury liability, products, and completed operations.
- 6.2.3 **Insurance Certificates.** Prior to execution of the Contract, Consultant must transmit certificates evidencing the types and amounts of insurance listed above to the Solicitation Coordinator identified in Section 1.1 of this RFP. Contractor's insurance must be obtained from companies or entities that are authorized to provide insurance in 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.

7.0 CONDITIONS OF THIS RFP

All proposals submitted in response to this RFP are subject to the conditions of 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 (ORS) and other rules pertaining to procurement and contracting at Prosper Portland.

7.1 Proposal Preparation and Submission Instructions

7.1.1 **Quantities of Proposals.** Proposers must submit the following materials which must be received by Prosper Portland at the proposal delivery location listed in Section 1.1 of this RFP no later than the “Proposal Due Date and Time” listed in Section 1.3 of this RFP:

- One (1) color hard-copy proposal
- One (1) electronic copy on a USB flash drive or CD-ROM in either Adobe Acrobat or MS Word

7.1.2 **Packaging and Labeling.** Proposals must be submitted in a sealed package or envelope. To ensure proper identification and handling, the package or envelope must be **clearly marked** with the following:

- RFP Solicitation Number
- Proposer’s name and address
- Date and time proposals are due
- Name and address of Prosper Portland’s Solicitation Coordinator for this RFP

PROSPER PORTLAND IS NOT LIABLE FOR ANY LOST, LATE, OR IMPROPERLY MARKED PROPOSALS.

7.1.3 **Form of Proposal.** Proposals must be typewritten on 8.5” x 11” white paper in no less than 11-point typeface. NO ORAL, EMAIL OR FACSIMILE PROPOSALS WILL BE ACCEPTED. Proposals should address the submittal requirements of this RFP in a clear, concise, and direct manner. Unnecessarily elaborate or lengthy proposals are not desired.

7.2 **Pre-Proposal Meeting.** A pre-proposal meeting is not scheduled for this RFP.

7.3 **Questions and Requests for Changes to this RFP.** All material questions and requests for changes to any matter contained in this RFP must be submitted in writing to the Solicitation Coordinator identified in Section 1.1 of this RFP. Questions and requests for changes may be sent by email (preferred), mail, or fax and must contain the following:

- RFP solicitation number and title
- RFP section being questioned
- Specific question or request for change

All such questions and requests for changes must be submitted to the Solicitation Coordinator no later than 2:00 PM (Pacific Time) on the “Deadline for Questions and Requests for Changes” listed in Section 1.3 of this RFP.

7.4 **Clarification and Changes to this RFP.** All material clarifications and changes to any matter contained in this RFP will be issued in the form of a written addendum to this RFP. Unless otherwise stated, Proposers are not required to return addenda with their proposal; however, Proposers are responsible for making themselves aware of, obtaining, and incorporating any changes made in any addendum into their final proposal. Failure to do so may cause the Proposer’s proposal to be rejected.

Up to the date and time proposals are due, it is the responsibility of all parties interested in this RFP to refer frequently to Prosper Portland's Contract Opportunities website (www.prosperportland.us/bids) to check for any addenda that have been issued for this RFP. Prosper Portland may make a courtesy effort to notify interested parties that an addendum has been issued for this RFP; however, interested parties are ultimately responsible for being aware of addenda issued by Prosper Portland and modifying their proposal accordingly.

- 7.5 **Preparation Costs.** Proposers responding to this RFP do so at their own expense and Prosper Portland will not reimburse any expenses incurred by Proposers in the preparation or submission of a proposal to this RFP; including costs associated with any meeting, demonstration, interview, or subsequent negotiations that may be requested or required.
- 7.6 **Sole Point of Contact.** After this RFP has been issued and before the Contract is in effect, direct all questions, comments, and requests for changes regarding this RFP or the anticipated contract to the Solicitation Coordinator identified in Section 1.1 of this RFP.
- 7.7 **Restrictions on Communications.** Proposers must not communicate with members of the Evaluation Committee, the Prosper Portland Board of Commissioners or any Prosper Portland employee not specifically named in this RFP, except upon invitation by Prosper Portland in a formal interview by the RFP Solicitation Coordinator. Doing so may be cause for proposal rejection. Prosper Portland will not hold "one-on-one" meetings with any interested party during the RFP process outside of a formal interview.
- 7.8 **Section Headings.** The section headings and titles used in this RFP are for convenience only and in no way modify the scope or intent of any provision contained in this RFP.
- 7.9 **Public Records and Disclosure**
- 7.9.1 All proposals submitted in response to this RFP will become the property of Prosper Portland and will be subject to disclosure pursuant to the Oregon Public Records Law (ORS 192), except those portions of a proposal that a Proposer requests exemption from disclosure consistent with ORS 192.
- 7.9.2 Any portion of a proposal that a Proposer claims to constitute a "trade secret" must meet the requirements of ORS 192.501(2) and be easily separable from the proposal to facilitate review of the non-confidential portion of the proposal. All such sections in a proposal must be CLEARLY AND CONSPICUOUSLY marked with the following:
- "This information constitutes a trade secret under ORS 192.501(2),
and shall not be disclosed except in accordance with Oregon Public
Records Law, ORS 192."**
- 7.9.3 If a Proposer marks every page or includes a blanket statement that the entire proposal is "Confidential" or "Proprietary," the statutory requirement is not met and any proposal marked that way will not be deemed to have been submitted in confidence. Upon request, the entirety of such a proposal will be disclosed.
- 7.9.4 Prosper Portland will take reasonable measures to hold in confidence all proposal contents marked in the way described above, but shall not be liable for the release of

any information when required by law or court order, whether pursuant to ORS 192 or otherwise.

7.9.5 After award, the Contract between Prosper Portland and the successful Proposer will be a public document and no part of the Contract can be designated as “Confidential.”

7.9.6 Unless this RFP is cancelled, proposals and evaluation results will not be made a part of the public record until Prosper Portland has issued its Notice of Intent to Award.

7.10 **Information Submitted.** It is the sole responsibility of each Proposer to submit information related to the submittal requirements contained in this RFP and Prosper Portland is under no obligation to request additional information if it is not included within your proposal. However, Prosper Portland may request Proposers submit additional information during or after the proposal evaluation period; or overlook, correct, or require a Proposer to correct any obvious clerical or mathematical error(s) in their proposal.

7.11 **Proposer Offer, Withdrawal, and Modification.** By submitting a proposal in response to this RFP, each Proposer agrees their proposal is a binding offer to perform the work described in this RFP for a period of ninety (90) calendar days from the date proposals are due. This period may be extended upon the mutual agreement between Prosper Portland and a Proposer. Proposals may be withdrawn or modified prior to the proposal due date and time by submitting a written request to the Solicitation Coordinator for this RFP. Proposals may not be withdrawn or modified after the proposal due date and time unless Prosper Portland agrees to the withdrawal or modification in writing.

7.12 **Method of Evaluation.** All responsive proposals will be reviewed and scored by an evaluation committee. The responsive proposals are those proposals that substantially comply with all required submittal procedures and requirements. This evaluation committee will include staff of Prosper Portland and potentially one or more external reviewers. Using the Evaluation Criteria listed in Section 5 of this RFP, evaluators will use their independent judgment to score the quality, completeness, and appropriateness of each Proposer’s written response as well as any relevant information that Prosper Portland may subsequently request or discover. 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).

7.13 **Proposer Demonstrations and Interviews.** Prosper Portland intends to invite the Finalist Proposers to interview with Prosper Portland staff and demonstrate their proposed Software product. Onsite interviews and demonstrations are strongly preferred, though not required. If requested, attendance at such an interview/demonstration is mandatory.

Prosper Portland further requires a live demonstration of the full product (and proposed version) in production (i.e., not a presentation with screen-shots of the product). The Prosper Portland interview room will have a PC with internet access, digital projector and screen. Finalist Proposers are encouraged to bring their own computing equipment (including software and internet connectivity) if the full product cannot be demonstrated with Prosper Portland’s equipment and configuration.

7.14 **Best and Final Offers (Optional).** Prosper Portland may choose to enter into discussions with one or more of the Finalist Proposer(s) and request revised proposals (the “best and final offers”). All such discussions and requests for best and final offers will be done fairly and for the

sake of receiving the best proposals based on the requirements and evaluation criteria contained in this RFP.

- 7.15 **Selection Process.** If product demonstrations are conducted, Prosper Portland reserves the right to either re-score the Finalist Proposer(s)' proposal(s) based on the interview(s) or use the original scores solely as the basis to determine the Finalist Proposer(s) and re-rank the proposals based on the combined strength of the Finalist Proposer(s)' proposal and interview.
- 7.16 **Determination of Responsibility.** In determining whether a Proposer meets the applicable standards of responsibility to perform the work described in this RFP, Prosper Portland may investigate the references, financial stability, credit history, and past performance of any Proposer, including service(s) provided to Prosper Portland, with respect to the Proposer's successful performance on other projects; compliance with contractual specifications and obligations; completion or delivery of a project on schedule and within budget; its lawful payment of suppliers, subcontractors, and employees; and other factors described in ORS 279B.110. Prosper Portland reserves the right to use any information or reference that may be discovered. Prosper Portland may postpone issuance of its Notice of Intent to Award in order to complete its determination of responsibility.
- 7.17 **Notice of Intent to Award.** After completion of the evaluation process, Prosper Portland will name an "apparent successful Proposer" and issue a Notice of Intent to Award ("NOIA") a contract to this Proposer. Identification of the "apparent successful Proposer" is procedural only and creates no right in the named Proposer to receive the Contract. All competing Proposers will be sent the NOIA by email. Once the NOIA has been issued, Proposers may view the materials in the RFP file by Solicitation Coordinator for this RFP.
- 7.18 **Protest of Selection Process.** Any protest of Prosper Portland's selection process must be submitted by email writing to the Solicitation Coordinator of this RFP within seven (7) calendar days of issuance of the NOIA. The Proposer's written protest must specify the legal, procedural, and/or factual grounds upon which the protest is based as well as a statement of relief requested. The judgment used by individual review committee members when scoring proposals is not grounds to protest the selection process. Protests not asserted or not properly asserted within the timelines described in this section will not be considered.
- 7.19 **Serial Negotiations.** After Prosper Portland has issued its NOIA and resolved all protests, Prosper Portland reserves the right to enter into limited negotiations with the apparent successful Proposer to finalize the pricing, modules to implement, Software terms and conditions, personnel, and other matters pertinent to the Software. If Prosper Portland, in its sole discretion, determines that such negotiations have reached an impasse, Prosper Portland reserves the right to terminate negotiations with that apparent successful Proposer and commence negotiations with the next highest-ranked responsive Proposer. This process may continue until an agreement is reached and the Contract is executed or Prosper Portland cancels this RFP.
- 7.20 **Reservation of Rights.** Prosper Portland, in its sole discretion, reserves the right to modify any matter contained in this RFP; cancel or suspend this RFP or to reject any or all proposals received in response to this RFP in accordance with ORS 279B.100; decide whether a proposal does or does not substantially comply with the submittal requirements and procedures described in this RFP; waive minor informalities of any proposal; obtain clarification or

additional information to properly evaluate a proposal; obtain references regarding any Proposer's past performance from any source; and negotiate a contract with the successful Proposer. Neither issuance of this RFP nor evaluation of any proposal(s) obligates Prosper Portland to award a contract from this RFP.

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EXHIBIT A. PROPOSER CERTIFICATION

Each Proposer must complete and return this page with their proposal.
Failure to do so may be grounds for proposal rejection.

RFP #16-18, Asset Management Software

- 8.1 You acknowledge receipt of addenda number ____ through ____ or N/A.
- 8.2 If awarded a contract from this RFP, prior to contract execution, you agree to satisfy all contract compliance requirements listed in Section 6.1 of this RFP.
- 8.3 To the best of your knowledge, your firm is not in violation of any local, state or federal tax law.
- 8.4 You certify your proposal is genuine and not made in the interest of or on behalf of any undisclosed person, firm or corporation; you have not solicited or induced any person, firm, or corporation to refrain from proposing; and you have not sought by collusion or fraud to obtain any advantage over any other Proposer or over Prosper Portland.
- 8.5 You certify that a) your firm has no business or personal relationships with any other company or person that could be considered a conflict of interest to Prosper Portland; and b) the Key Personnel identified to perform work under an awarded contract and/or the principals of your firm do not have any business or personal relationships with any Prosper Portland officer or employee that is not clearly disclosed in your proposal.
- 8.6 The undersigned warrants that he/she is an authorized representative of the Proposer; has read, understands and agrees to be bound by all RFP instructions, work requirements, and contract terms and conditions contained herein (including all addenda issued for this RFP); that the information provided in your proposal is true and accurate; and that providing incorrect or incomplete information may be cause for proposal rejection or contract termination.

SIGNATURE BLOCK

Proposer’s Legal Business Name: _____

Signature: _____ Date of Proposal: _____

Printed Name and Title: _____

Phone Number: _____ Email Address: _____

Proposer’s Mailing Address: _____

Proposer’s Primary Point of Contact for this RFP (if different): _____

Phone Number: _____ Email Address: _____

EXHIBIT B PRODUCT MATRIX

Please check the appropriate service/fee boxes to the right of each question. For example, if a service is currently available and is included in your base fee you would check both “Included in Base Service” and “Included in Base Fee” boxes. Feel free to use the “Vendor Comments or Description” box for additional information or if any items are checked under “Available for Add’l Fee.”

Please use comments/descriptions space provided for any item where the check-box is greyed-out.

		Included in Base Service	Anticipated in future version	Included in Base Fee	Available for Additional Fee	Not Supported	Vendor Comments, Description, or Additional Cost
1	Technical Information						
1.1	What are the <i>minimum</i> recommended desktop configuration requirements for the Software?						
1.2	What clients does your Software support?						
1.3	System availability: Describe the standard system availability and Service Level Agreements. Attach current schedule of regularly scheduled system maintenance (“System Down Time”) Describe your notification process for system down time, both scheduled and unscheduled What restitution will be paid if system availability is not met?						
1.4	Will you provide Prosper Portland with a complete and updated solution design document after Go-Live?						
1.5	What was your scheduled, as well as unplanned system downtime for the last four quarters?						
2	Data Security & Retention						
2.1	Describe system security for Prosper Portland’s data. Please address the following areas:						

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2.2						
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2.14						

		Included in Base Service	Anticipated in future version	Included in Base Fee	Available for Additional Fee	Not Supported	Vendor Comments, Description, or Additional Cost
2.15	Describe your disaster recovery infrastructure and failover ability?						
2.16	Are your data, system controls and administrative procedures audited by an independent firm on a regular basis?						
2.17	Describe your policy for covering liabilities that arise due to negligence and errors on your part.						
3	System and Network Performance						
3.1	Network Implications: Describe the implications, if any, for Prosper Portland's network infrastructure						
4	System Enhancement Requests/Upgrades						
4.1	What is the process for requesting a change to your system?						
4.2	Describe the timing, procedures and process for upgrades. What is the typical upgrade cycle?						
4.3	Describe how Prosper Portland would preview and test updates before they are released to production.						
4.4	Describe how Prosper Portland would be trained on updates before they are released to production.						
4.5	When your system is updated/upgraded, what type of IT support would be required on Prosper Portland's side?						
5	Permissions						
5.1	Describe how your system implements role-based access and different levels of permissions for various user roles.						
6	Administration						

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6.1	What functions would an internal System Administrator perform on an ongoing basis at Prosper Portland (e.g., security, list of values maintenance, table maintenance etc.)?						
6.2	What functions, if any, would an IT developer and/or BSA need to perform on an ongoing basis at Prosper Portland?						
6.3	What functions, if any, would a web developer need to perform on an ongoing basis at Prosper Portland?						
6.4	Please describe any additional system administrative roles that Prosper Portland would need to provide.						
6.5	What resources are required by Prosper Portland to maintain system once implemented? In your answer please refer to both technical and business resources to be required.						
7	System Interfaces						
7.1	What are the methods for connection and transferring data between Prosper Portland and your system?						
7.2	Detail how required interfaces will work without compromising Prosper Portland's firewall or network security.						
7.3	What visibility do we have as to the status (i.e., success/failure, etc.) of data transfers?						
7.4	What asset management systems you're your Software currently pass data to/from?						
7.5	If you have an existing interface or extracts to Microsoft Dynamics, what is the current Dynamics version you support?						

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7.6	Are they pre-defined interfaces or extracts? If so, what standards are used in defining those interfaces?						
7.7	If an interface is built, what is your process for ensuring your application is fully compatible with new releases of Dynamics?						
8	Asset Management (required)						
8.1	Robust valuation 'suite' with the ability to perform discounted cash flow ("DCF"), easily manipulate components such as the cap rate, discount rates, lease and vacancy assumptions, operating expense annual escalations, annual rent escalations; and to calculate net present value ("NPV"), cash on cash return, and internal rate of return ("IRR").						
8.2	Detailed, easy to read, and visually appealing reporting capabilities for both property- level and portfolio-level performance.						
8.3	The ability to create 'hypothetical' models for potential acquisitions, dispositions, and developments and view impact on portfolio-level performance without overwriting existing 'in-place' operating information.						
8.4	Track actual income and expenses on an individual property level (including the ability to break out individual tenants), compare historical to actual income and expense levels, and forecast income and expenses.						
8.5	Robust lease administration tools including the ability to track key lease terms and maintain property level rent rolls.						

		Included in Base Service	Anticipated in future version	Included in Base Fee	Available for Additional Fee	Not Supported	Vendor Comments, Description, or Additional Cost
8.6	Analyze individual proposed lease transactions against budgeted returns.						
8.7	Track payables and receivables by property, tenant, and vendor.						
8.8	Track critical dates, such as lease expirations, rent escalations, and insurance expirations.						
8.9	Calculate prorated common area maintenance ("CAM") expenses/charges.						
8.10	Track leases, amendments, and options.						
8.11	Calculate loan debt service and impact on cash flow, including variables such as loan amount, fees, interest rate, prepayment penalties, loan term, and amortization period						
8.12	Build pro-formas and perform sensitivity analysis on properties currently in portfolio as well as future investments.						
8.13	Create capital improvement budgets and distinguish between operating and capital expenses.						
8.14	Create a dashboard that allows Prosper Portland's Leadership Team to obtain portfolio information easily and efficiently, as well as staff to share information easily with Board of Commissioners and other stakeholders.						
8.15	Data import/export functionality for integration into external systems.						
9	Asset Management (Optional)						
9.1	Document management functionality, including the ability to import and associate external documents (e.g., Adobe Acrobat, Microsoft Excel) with asset information.						
9.2	Access for mobile/tablet devices.						

		Included in Base Service	Anticipated in future version	Included in Base Fee	Available for Additional Fee	Not Supported	Vendor Comments, Description, or Additional Cost
9.3	Capabilities for future 'add-ons' in construction management, payment processing, work order management, and other related functions.						
9.4	Track appraised values.						
9.5	A means to test the Software outside of the Production environment during or after implementation						
10	Reporting						
10.1	What existing reports do you provide to the client? Please provide a list and samples of your delivered reports.						
10.2	What are your ad hoc reporting capabilities?						
10.3	What is your approximate cost, process and turn-around time for a custom report?						
10.4	Are Prosper Portland Administrators required to complete specific training on reports?						
10.5	Are you willing to provide on-site education during implementation?						