



## REQUEST FOR QUALIFICATIONS #19-09 COMMERCIAL TENANTING SERVICES

Proposals Due: February 21, 2020 by 2:00 PM (Pacific)

### 1.0 REQUEST FOR QUALIFICATIONS SUMMARY

Through this Request for Qualification (“RFQ”), Prosper Portland is seeking statements of qualifications and pricing (“proposals”) from qualified commercial, retail and merchandising consultants and licensed real estate brokers to provide support to Prosper Portland staff in implementing Prosper Portland’s goals identified in the agency’s 2015-2020 [Strategic Plan](#) through commercial redevelopment projects within the city’s urban renewal areas (URAs). Prosper Portland intends to award multiple contracts from this RFQ.

### 2.0 CONTACT AND PROPOSAL DELIVERY INFORMATION

Direct all questions and submit one (1) original, five (5) color photocopies, and one (1) soft-copy proposal (on CD-ROM or thumb-drive) in a sealed envelope to Prosper Portland’s Solicitation Coordinator for this RFQ no later than the deadline listed in Section 3.0:

Solicitation Coordinator*	Proposal Delivery Location
<b>Breanna Rodriquez,</b> Senior Project Program Specialist <b>(503) 823-3199</b> (direct) <a href="mailto:rodriquezb@prosperportland.us">rodriquezb@prosperportland.us</a> (email)	<b>Prosper Portland</b> <b>Attn: Breanna Rodriquez</b> <b>222 NW 5<sup>th</sup> Avenue</b> <b>Portland, OR 97209-3812</b>

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

### 3.0 PROCUREMENT SCHEDULE

PDC reserves the right to change this schedule for any reason.

Procurement Activity	Date
Request for Qualifications Issued	February 5, 2020
Deadline for Questions or Requests for Change	February 14, 2020
<b>Proposal Due Date and Time**</b>	<b>FRIDAY, FEBRUARY 21, 2020 BY 2:00 PM (PACIFIC)</b>
Notice of Intent to Award, issued ( <i>anticipated</i> )	March 4, 2020
Contract Effective Date ( <i>anticipated</i> )	March 9, 2020

\*\* 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

Created by Portland voters in 1958, Prosper Portland has been a driving force in Portland's reputation for vibrancy and livability. As Portland's urban renewal and economic development agency, Prosper Portland seeks to create one of the world's most globally competitive, healthy, and equitable cities. As part of its goal to achieve widely shared prosperity among all Portland residents, Prosper Portland is expanding its tools for job creation, placemaking, and economic opportunity.

Prosper Portland-sponsored commercial redevelopment and retail leasing activities seek to increase equitable opportunities for historically disadvantaged people and communities by providing access, technical assistance, and in some instances commercial affordability, to support business owners' development and expansion.

In alignment with [Strategic Plan](#) goals for equitable wealth creation, Prosper Portland aims to grow household income and wealth by providing technical support to emerging and small businesses and access to affordable commercial space. Prosper Portland will prioritize businesses owned by persons of color or low-income, or a long-term property owner ("Priority Businesses") from neighborhoods. Ideal tenants will contribute to an active ground floor experience, provide needed goods and services to the surrounding community, or are destination businesses that help to spark the retail district. It is anticipated services will be provided to smaller scale businesses with space needs of around 1,000 square feet or less.

Prosper Portland has dedicated resources for Priority Business owners seeking commercial and/or retail space in Prosper Portland sponsored projects including new development and other property re-positioning efforts within the city's Urban Renewal Areas (URAs). There are several tools that Prosper Portland will be utilizing to achieve its goals throughout the city, including but not limited to:

- Providing discounted rents in properties owned or controlled (master leased) by Prosper Portland;
- Matching grants for tenant improvements; and
- Technical assistance to businesses

Prosper Portland has multiple projects underway for ground floor retail in mixed use buildings and parking garages. Prosper Portland is seeking consultancy and broker expertise from firms with demonstrated experience in providing services to the priority business types listed above.

## 5.0 SCOPE OF SERVICES

Through this RFQ, Prosper Portland seeks to enter into Flexible Services Contracts ("Contract") with successful Proposer(s) (the "Consultant(s)") for one or more of these three (3) commercial tenancing service categories. Proposals can include *any combination* of these service categories:

1. Category One: **Space Planning**
2. Category Two: **Tenant Strategies**
3. Category Three: **Marketing and Brokerage Services**

Proposers **must clearly indicate** which category or categories of service they're offering in the cover letter of their RFQ submission.

Project-specific work will be ordered through a Work Order as described in Section 2 of Exhibit A of the Contract template (see: [http://www.pdc.us/Libraries/RFP/FSC\\_TEMPLATE\\_pdf.sflb.ashx](http://www.pdc.us/Libraries/RFP/FSC_TEMPLATE_pdf.sflb.ashx)).

The scope of each service category is as follows:

#### 5.1 Category One: **Space Planning**

- Space Programming
  - Assist Prosper Portland with optimal space demising, layout, and identifying opportunities to activate space storefronts.
  - Provide and exchange technical information and considerations with project team regarding shell delivery and projected tenant improvements to verify projections, maximize marketability of the space, and streamline leasing process.
  - Provide input on location and program for utilities, trash, and other services/systems.
  - Provide expertise around restaurant space development needs early in design development and work with the project architect to incorporate infrastructure requirements in architecture and engineering drawings.
  - In limited circumstances, owner may request Consultant provide similar space planning services for prospective tenants.
- Review and advise about regulatory processes.
- Conduct analysis of property history to identify potential barriers (i.e. grandfathered approvals, unpermitted work, conditional use, triggers for upgrades).
- Review of architectural drawings, renderings, elevations, demising, and signage plans.

#### 5.2 Category Two: **Tenanting Strategies**

- Curate tenanting plans for spaces owned or controlled by Prosper Portland that reflect a mix of tenant types, sizes, and business maturation that are localized to specific geographies taking into account an area's market opportunity and demographics.
- Clearly define use requirements and include either desirable uses only and/or uses that are not allowed.
- Advise on market conditions and demand by business type.
- Perform financial analyses including return calculations for lease rates, terms and conditions, in addition to other cost and benefit analysis for different development/tenanting strategies that meets Prosper Portland's tenant and financial goals.

#### 5.3 Category Three: **Marketing and Brokerage Services**

- Provide necessary market listing services including, but not limited to, developing marketing materials, developing brands for buildings/projects, identifying prospective tenants, developing marketing strategies, showing space to prospective tenants, preparing financial analyses including return calculations

to compare tenant proposals, and recommending lease rates, terms and conditions.

- Help identify and prioritize prospective tenants using established criteria and existing neighborhood goals.
- Experience working with restaurants and their specific space and infrastructure needs.
- Document prospective tenant interest and provide reports to Prosper Portland’s project manager upon request.
- Participate in community outreach and marketing events and activities.
- Proactive outreach to underrepresented groups.
- Engage with Prosper Portland sponsored service providers (e.g., Hacienda CDC, Hispanic Metropolitan Chamber, Immigrant and Refugee Community Organization (IRCO), Micro Enterprise Services of Oregon (MESO), Native American Youth and Family Center (NAYA), Neighborhood House – Childcare Improvement Project, PSU Business Outreach Program, and others as directed by Prosper Portland) to source potential tenants.
- Assist and advise Prosper Portland in negotiating terms and conditions of agreements consistent with federal and state laws and Prosper Portland strategic and financial objectives and requirements.
- Participate in meetings with prospective lessees, Prosper Portland staff, and neighborhood representatives.
- Prepare for Prosper Portland’s signature any disclosures required by state or local law.
- Other work related to property leasing as may be required.

## 6.0 SUBMITTAL REQUIREMENTS

To offer these services to Prosper Portland, submit a proposal **NOT EXCEEDING SEVEN (7) PAGES** that includes the following:

1. A **cover letter** clearly indicating which categories of services(s) your firm proposes to provide. Include the name, mailing address, phone number, and email address of your primary point of contact for this RFQ. (Not Scored)
2. Briefly describe the **experience of your firm and personnel** as it relates to those services identified above (citing a minimum of two (2) projects for each proposed category) and include relevant experience with building/space renovations and new construction. (Maximum points: 15)
3. Describe your **approach** to service delivery including your experience working with public partners or through public-private partnerships. (Maximum points: 15)
4. A summary of your commitment to **social equity** including specific experience working with those Priority Businesses described in Section 4.0 above. Indicate if your firm is currently a Certified Firm or recently applied for certification with the State of Oregon’s Certification Office of Business Inclusion and Diversity (“COBID”). (Maximum points: 12)

5. Propose a **compensation structure** for your scope of services. For instance, if you have selected both consultancy and brokerage services the structure could be a percentage rent for brokerage and an hourly fee for consulting services. (Maximum points: 8)

## 7.0 CONTRACT REQUIREMENTS

- 7.1 **Form of Agreement.** The Proposer selected to perform the work described in this RFQ will be invited to enter into a Flexible Services Contract (the “Contract”) with Prosper Portland. The terms and conditions for the Contract can be [found in the template](#) on Prosper Portland’s website. *Any exceptions to Prosper Portland’s standard contract terms and conditions must be disclosed in your proposal.*
- 7.2 **Contract Term.** The initial term of the Contract will be for a period of **two (2) years** which may be extended for two (2) additional one-year terms on one (1) additional two-year term upon the mutual written agreement between the parties to the Contract.
- 7.3 **Contract Amounts.** If awarded a Contract to perform the Space Planning scope (Category 1) or Tenanting Strategies scope (Category 2), the initial, not-to-exceed contract amount will be \$50,000. If a Proposer is awarded both scopes of service, the initial Contract will be for an amount not to exceed \$75,000. If the Proposer is awarded the scope for Marketing and Brokerage Services (Category 3), the contract will not have a set not-to-exceed amount; rather the broker’s compensation will be based upon proposed commission structure.
- 7.4 **Insurance Requirements.** Insurance requirements are listed in Exhibit B of the [Contract template](#). The following types of insurance apply: (a) Workers compensation (if the Consultant is a “subject employer” under ORS Chapter 656), (b) General Liability, (c) Automobile Liability, and, only if the Proposer is awarded the scope for Marketing and Brokerage Services, (d) Professional Liability.

## 8.0 GENERAL CONDITIONS OF THIS RFQ

All proposals submitted in response to this RFQ are subject to the conditions and requirements contained within this RFQ. All matters not specifically addressed in this RFQ 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.

### 8.1 Proposal Preparation and Submission Instructions.

8.1.1 **Quantities of Proposals.** Proposers must submit the following which must be received by Prosper Portland at the location listed in Section 2.0 of this RFQ no later than the “Proposal Due Date and Time” listed in Section 3.0 above:

- **One (1) signed original**, hard-copy proposal
- **Five (5) color photocopies** of the same pages
- **One (1) electronic copy** of the proposal on CD-ROM or on a thumb-drive in Adobe Acrobat or Microsoft Word format

THE ORIGINAL PROPOSAL MUST BEAR AN ORIGINAL INK SIGNATURE AND MUST BE MARKED “ORIGINAL.”

8.1.2 **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:

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

Prosper Portland shall not be liable for any lost, late or improperly marked proposals.

8.1.3 **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.

8.2 **Preparation Costs.** Prosper Portland is not responsible for any costs you might incur in the preparation or submission of a proposal for this RFQ.

8.3 **Questions and Changes to this RFQ.** Any requests for clarification or change to any matter contained in this RFQ must be submitted by email to the Solicitation Coordinator no later than 5:00 p.m. (Pacific) on the date questions are due (see Section 3.0 above). Any material change or clarification of any matter contained in this RFQ will be issued in the form of a written Addendum to this RFQ. Oral comments offered by Prosper Portland staff will not modify this RFQ in any way.

8.4 **Public Records and Disclosure.** All proposals submitted in response to this RFQ 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.

8.5 **Evaluation Criteria and Process.** All responsive submissions will be reviewed and scored by an evaluation committee that will include Prosper Portland program staff and potentially one or more external partners. The "responsive submissions" are those submissions that substantially comply with all required submittal procedures and requirements of this RFQ. Using the Evaluation Criteria listed in Section 6 above, the evaluators will use their independent judgment to score the quality, competitiveness, and strength of each respondent's written submittal 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 for each service category. The highest-ranked proposer(s) in each service category will be considered the Finalist Proposer(s).

8.6 **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 RFQ. If interviews are not conducted, Prosper Portland will award the Contract(s) to the

highest-ranked responsive Proposers in each Service Category. 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.

- 8.7 **Consent of Terms.** By submitting a proposal in response to this RFQ, 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 contract requirements (Section 7), RFQ general conditions (this Section 8), and contract terms and conditions (see Section 7.1) contained in this RFQ (including any addenda issued for this RFQ); (3) certify that proposer is an independent contractor as defined by ORS 670.600 and under penalty of perjury is, to the best of the proposer's knowledge, not in violation of any local, state or federal tax law; (4) certify their proposal is truthful, genuine and not made in the interest of or on behalf of any undisclosed person, firm or corporation; (5) have no business or personal relationships with any other company or person that could be considered a conflict of interest to Prosper Portland; and (6) that the key personnel and principals identified to perform work under an awarded contract do not have any personal or business relationships with any Prosper Portland officer, commissioner, or employee.
- 8.8 **Reservation of Rights.** Prosper Portland, in its sole discretion, reserves the right to change, extend the deadline or cancel this RFQ; to reject any or all proposals received in response to this RFQ; to decide whether a proposal does or does not substantially comply with the requirements of this RFQ; 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 RFQ nor evaluation of proposals obligates Prosper Portland to award a contract from this RFQ.

**END OF THIS RFQ**