



**PORT OF TACOMA
REQUEST FOR PROPOSALS
No. 070082**

REAL ESTATE MANAGEMENT SYSTEM

Issued by
Port of Tacoma
One Sitcum Plaza
P.O. Box 1837
Tacoma, WA 98401-1837

RFP INFORMATION	
Contact:	Heather Shadko, Procurement
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Phone:	(253) 428-8697
Submittal Date	MARCH 24, 2015 @ 2:00 PM (PST)

**PLEASE SUBMIT ALL CORRESPONDENCE AND PROPOSALS
VIA E-MAIL DIRECTLY TO THE PROCUREMENT CONTACT LISTED ABOVE
AND INCLUDE 'REAL ESTATE MANAGEMENT SYSTEM' IN THE SUBJECT
LINE**

PORT OF TACOMA
Request for Proposals (RFP) #070082
Real Estate Management System

The Port is soliciting proposals from firms interested in providing Software, consulting and technical support services for a Real Estate Management System that is Software-as-a-Service (SaaS), Cloud-based, or otherwise hosted off-premise.

A. BACKGROUND

The Port of Tacoma is a major center for container cargo, bulk, break-bulk, autos and heavy-lift cargo. Created by Pierce County citizens in 1918, the Port of Tacoma has become one of the largest container ports in North America and one of the top 50 in the world. The Port of Tacoma manages a diverse set of business operations relating to maritime trade. To learn more about the Port of Tacoma, visit www.portoftacoma.com.

The Port of Tacoma owns approximately 2,200 acres of valuable industrial uplands in Tacoma, WA. Of this total acreage, the Real Estate Department actively manages about 550 acres. The remaining property is used for marine terminals, bulk operations, auto storage, public access, mitigation properties, and transportation infrastructure (rail and truck queuing). Currently the Real Estate Department manages about 150 active leases for land, office and warehouse space. The goal is to lease properties at market rates and utilize the land in its highest and best use.

The Port maintains several enterprise and departmental software applications and platforms, including Microsoft Dynamics GP, Microsoft SharePoint, IBM Maximo Asset Management, Microsoft Dynamics CRM, Oracle Primavera Contract Management, Microsoft Dynamics Prophix CPM and Esri ArcGIS. The Port manages these applications on Microsoft Windows servers and Microsoft SQL databases. The Port has an in-house Information Technology department and technical, functional, and business process staff.

The Port intends to implement a Real Estate Management software solution to manage its properties and leases. A SaaS, cloud based, or otherwise off-premise hosted solution is sought. The Port is keen to implement a solution that fits with and minimizes functional overlaps between the Real Estate Management System and other software systems within its enterprise software portfolio. Specific solution requirements are defined in Attachment D.

The Port anticipates awarding a single contract to the selected vendor. The period of performance of the contract is three (3) years, with an option to extend for additional one-year terms to provide related services as required.

It should be noted by all vendors submitting proposals that procurement of a solution is subject to project authorization by the Port's IT Governance Committee. This authorization will not be finalized until all project costs are known and authorization may be declined.

The Port's Standard Terms and Conditions are included as Attachment B to this RFP. By submitting a Proposal, the Proposer represents that it has carefully read and agrees to be bound by the Port's Standard Terms and Conditions. Identify during the question submittal and response period, any sections you consider onerous, clarify why you consider these sections onerous, propose alternative language and describe why it is in the Port's best interests to adopt the alternative language.

Proposals submitted with altered or conditioned Terms and Conditions without prior written agreement from the Port will be considered non-responsive and not considered for evaluation.

B. SCOPE OF SERVICES:

Through this RFP the Port aims to select a Real Estate Management system that will increase the efficiency and effectiveness of the Port's property and lease management processes.

Proposing vendors are expected to provide all required components of the Real Estate Management solution. This is anticipated to consist of vendor supplied software, implementation services (including design, configuration, testing and deployment), hosting services, and ongoing support services.

The overall solution may include:

- Software and all required licenses or subscription fees
- Ongoing solution support and maintenance services
- Software implementation services, including software design and configuration services for all solution components
- Training services
- Documentation
- Application hosting services

The overall solution implementation will be formally managed as a project by the vendor, with a defined scope, schedule and budget. A work breakdown structure, task and dependency-driven project schedule, and issues log are to be maintained. Solution design, configuration, implementation and testing will be appropriately managed. Project risks and task progress will be formally communicated. The Port will assign a Project Manager to act as a focal point for vendor communications.

Services will be provided at the Port's direction and discretion and may be provided in collaboration with Port IT staff or third party support vendors. Services may be provided onsite or remotely, at the Port's discretion.

C. DELIVERABLES:

Deliverables will include:

Software Solution and Licenses: All software and licenses required to operate the solution. If any third party software components are required, specify the required components and any related licensing implications in your proposal.

Software licensing requirements will be dependent upon the licensing model of the selected solution. For purposes of this proposal, Software licenses will be required to support the following users and environments:

System administrators	- 2
Real Estate Users/Clients	- 10
Environments	- 2 (Dev/Test and Production)

Specific solution requirements are defined in Attachment D. If any defined requirements have implications on licensing, ensure these are identified and included in the proposal submitted.

Hosting Agreement (as applicable): Software hosting agreement specifying levels of service and SLA's, security, management, data center infrastructure, etc.

Support and Maintenance Agreement (as applicable): Software technical support and maintenance agreements, providing the Port with access to technical support staff, software bug fixes and service packs, and the right to future releases of software purchased.

Project Management Deliverables: Work breakdown structure, task and dependency-driven project schedule, weekly status reports including risk and task progress updates, issues log, test scripts and results.

Training: End user and administrator training and training materials.

System Documentation: Comprehensive system documentation including infrastructure designs and System Administration Manuals.

Solution Configurations: All configuration files and detailed documentation defining system, infrastructure and environment configurations.

Solution Implementation: A tested and accepted solution implementation.

D. RFP ELEMENTS & EVALUATION CRITERIA:

Proposals should present information in a straightforward and concise manner, while ensuring complete and detailed descriptions of the firm's/team's abilities to meet the requirement of this RFP. Emphasis will be on completeness of content. The written proposals should be prepared in the sequential order as outlined below.

Proposals are limited to 25 numbered pages (8 ½ by 11 inch) **including** the cover letter and all appendices. All pages shall be in portrait orientation with 1 inch margins. Font

size shall be 11 point or larger. Proposals that do not follow this format will not be reviewed.

The cover letter shall include the RFP title and number as well as the name, title, email address, phone number and address of the proposing team's main contact and include the following information:

- Describe any claim submitted by any client against the firm within the past two years related to the services provided by the firm or its key personnel. For purposes of this request, "claim" means a sum of money in dispute in excess of 5% of the firm's fee for the services provided.
- Any real or perceived conflicts of interests for team members, inclusive of the prime, sub-consultants and key team members.

Proposals are to address, and will be evaluated upon, the following criteria:

INITIAL EVALUATION PHASE

1. Qualifications & Experience.....10 PTS

- Describe the qualification and experience of the firm submitting the proposal, including:
 - Length of time in business; length of time offering software and services similar to those proposed; market/vertical specializations.
 - Business history including patterns of growth, mergers or acquisitions; office locations.
 - Number and experience of staff; staffing model including identifying the level to which consultants used are staff or independent contractors.
 - Number of customers; number of current, active users of the proposed software.

2. Solution.....40 PTS

- Describe in detail the software solution proposed, including:
 - Software system; modules proposed to meet the solution requirements; functionality, features and capabilities; and other relevant information.
 - Software version history, future lifecycle plan, version release model.
- Describe in detail the solution provisioning model proposed. Include information on service type (SaaS, hosted, etc.), infrastructure utilized, security and redundancy considerations, multi-tenancy environments, data centers including third party information and physical locations, etc.
- Describe the how separate software modules or components can be used independently of other components without compromising overall system functionality.

- Describe in detail, including utilizing diagrams, the overall system and solution architecture and underlying technologies.
- Complete Attachment D, Solution Requirements. Define whether the software proposed and the overall solution meets or does not meet each requirement. Describe in functional and technical detail how each requirement is met, including any restrictions or exceptions.

3. Work Approach.....20 PTS

- Describe the consultant's proposed project management approach. Include a draft project plan defining project phases, tasks, resources (both consultant and Port) and anticipated task durations.
- Assumptions and Risks: Define the assumptions made regarding accomplishing the Scope of Services. Define the factors the consultant believes are risks to the successful completion of this project and proposed mitigation strategies.
- Coordination & Communication: Provide a plan for communications and coordination between the Consultants team and the Port.
- Describe the consultants considerations for onsite or remote access performance of project tasks.
- Include a summary of innovative ideas and suggestions for enhancing the scope of services.
- Technical Support: Define the consultant's experience providing technical support services and describe the organizational support structures and processes established.

4. Compensation.....30 PTS

Present detailed information on the firm's proposed recurring and non-recurring costs for services proposed.

Compensation information MUST be provided separately from the proposal, in an individual PDF document.

- Include in cost proposal separate line items specifying and itemizing the cost for each proposed system component for hosting and maintenance.
- Implementation
 - Provide an estimated range, based upon previous experience, of the total services costs to implement the proposed solution.
- Specify all additional non-recurring fees, charges, expenses, etc. that are, or may be, billable to the Port.

All rates and costs/fees quoted shall be:

- **Fully burdened, including, but not limited to, administrative overhead and all direct/indirect expenses.**
- Quoted in US Dollars,

- Full cost inclusive of sales tax and other government fees, taxes and charges, and
- Valid throughout the contract period unless otherwise amended and agreed to by both parties in writing.

5. References 20 PTS

Ensure completion of a **minimum of 2 references** submitted using Attachment C. All references must be received by the Port by the proposal due date. The Port will evaluate the reference checks to assess the proposed team's overall performance and success of previous, similar work. Reference checks will also be utilized to validate information contained in the proposal. The Port may contact submitted reference sites directly to accomplish this.

FINAL EVALUATION PHASE (if applicable)

6. Interviews/Software Demonstrations 100 PTS

Software demonstrations will be conducted with the top-ranked proposers. Failure to participate in the interview process will result in the proposer's disqualification from further consideration. Software demonstrations will be held at the Port of Tacoma, Tacoma, WA. Travel costs will not be reimbursed for the interview.

Software demonstrations will be based on scripts provided by the Port. Software demonstrations are to be conducted in real time with live systems and data.

ATTACHMENT A – INSTRUCTIONS FOR PROPOSING

ATTACHMENT B – PERSONAL SERVICES TERMS AND CONDITIONS

ATTACHMENT C – REFERENCE QUESTIONNAIRE

ATTACHMENT D – SPECIFIC SOLUTION REQUIREMENTS

PROCUREMENT PROCESS

SOLICITATION TIMELINE:

Issuance of RFP	FEBRUARY 27, 2015
Last Day To Submit Questions	MARCH 16, 2015
Proposal packets due	MARCH 24, 2015 @ 2:00 PM (PST)
Short List Consultants*	APRIL 1, 2015
Interviews (if required)*	APRIL 14, 2015
Final Selection*	APRIL 21, 2015
Execute Contract*	MAY 2015

*Dates are tentative.

All status updates on the above solicitation timeline will be announced on the [Port's website for this solicitation](#).

VENDOR OBLIGATION

Port of Tacoma Requests for Bids, Requests for Proposals and Requests for Qualifications can be accessed on the Port's website, www.portoftacoma.com under 'Contracts'; 'Procurements'.

When viewing the details page for this procurement on the Port's Website firms have the option of subscribing to the Holder's List.



By subscribing to the Holder's List, firms will automatically be notified when new documents or changes relating to this procurement occur.

***Only those who have subscribed to the Holder's List will receive notifications throughout the procurement process, up until a firm is selected.**

COMMUNICATION / INQUIRES

Proposers who, relative to this scope of services, contact any individuals or Commission members representing the Port, other than the Procurement Representative listed on the RFP may be disqualified from consideration.

Written questions about the meaning or intent of the Solicitation Documents shall only be submitted to the Procurement Department, procurement@portoftacoma.com (**Solicitation Name** in the subject line).

Proposers who may have questions about provisions of these documents are to email their questions by the date listed above. The Port will respond to all written questions submitted by this deadline.

ADDENDA

The Port may make changes to this Solicitation. Oral or other interpretations, clarifications or submittal instructions will be without legal effect. Any information modifying a solicitation will be furnished in a formal, written addendum. If at any time, the Port changes, revises, deletes, increases, or otherwise modifies the Solicitation, the Port will issue a written Addendum to the Solicitation. Addenda will be posted to the Port's web site and conveyed to those potential submitters who have requested to be placed on the Holder's List.

SUBMITTAL PROCESS

Proposals must be received via email on or before the date and time outlined on the front page of this RFP. Send your electronic submittal to:

procurement@portoftacoma.com.

Name of Firm, RFP Title (Subject Line)

Please submit one electronic copy in Adobe Acrobat PDF format, including all appendices. Submittals need to be limited to **9 MB in total email size**. It is the Consultant's responsibility to verify the receipt of the submittal. Electronic verification will be provided upon request.

***Late proposals will not be accepted by the Port. Proposals received after the stated date and time will not be reviewed and shall be deemed non-responsive.**

All proposals submitted shall be valid and binding on the submitting firm for a period of ninety days following the Proposal submittal deadline and for any extension of time granted by the submitting firm.

EVALUATION AND AWARD PROCESS

An evaluation team will review each proposal and evaluate all responses received based upon the criteria listed herein. The Port may request clarifications or additional information, if needed. After the evaluation team individually scores each proposal, the scores are tallied and the firms are ranked based on the scores.

A selection may be made based on the proposals and initial evaluation criteria alone. Alternatively, the evaluation team may create a short list of the top ranked firms and invite the short listed firms in for interview and/or check references. Scores for reference checks and interviews will be tallied and added to the short listed firm's initial evaluation scores. Final selection will be based on reference checks and interviews.

The Port intends to select the Proposer who represents the best value to the Port and begin the negotiation and award process based on the evaluated scores.

The selected Consultant will be invited to enter into contract negotiations with the Port. Should the Port and the selected firm(s) not reach a mutual agreement, the Port will terminate negotiations and move to the next highest ranked firm and proceed with negotiations.

The Port reserves the right to accept or reject any or all information in its entirety or in part and to waive informalities and minor irregularities and to contract as the best interest of the Port may require. The Port reserves the right to reject any or all Proposals submitted as non-responsive or non-responsible.

Procedure When Only One Proposal is received

In the event that a single responsive proposal is received, the Proposer shall provide any additional data required by the Port to analyze the proposal. The Port reserves the right to reject such proposals for any reason.

GENERAL INFORMATION

News releases pertaining to this RFP, the services, or the project to which it relates, shall not be made without prior approval by, and then only in coordination with, the Port.

COSTS BORNE BY PROPOSERS

All costs incurred in the preparation of a Proposal and participation in this RFP and negotiation process shall be borne by the proposing firms.

SMALL BUSINESS AND DISADVANTAGED BUSINESS OPPORTUNITIES

The Port of Tacoma encourages participation in all of its contracts by MWBE firms certified by the Office of Minority and Women's Business Enterprises (OMWBE). Participation may be either on a direct basis in response to this solicitation/invitation or as a subcontractor to a Bidder/Proposer. However, unless required by federal statutes, regulations, grants, or contract terms referenced in the contract documents, no preference will be included in the evaluation of bids/submittals, no minimum level of MWBE participation shall be required as a condition for receiving an award and bids/submittals will not be rejected or considered non-responsive on that basis. Any affirmative action requirements set forth in federal regulations or statutes included or referenced in the contract documents will apply. The selected firm will be required to show evidence of outreach.

PUBLIC DISCLOSURE

Proposals submitted under this Solicitation will be considered public documents and, with limited exceptions, will become public information and may be reviewed by appointment by anyone requesting to do so following the conclusion of the evaluation, negotiation, and award process. This process is concluded when a signed contract is completed between the Port and the selected Consultant.

If a firm considers any portion of its response to be protected under the law, the vendor shall clearly identify each such portion with words such as "CONFIDENTIAL," "PROPRIETARY" or "TRADE SECRET" on each page for which the protection is sought. If a request is made for disclosure of such portion, the Port will notify the vendor of the request and allow the vendor not less than ten (10) days to seek a protective order from the Courts or other appropriate remedy and/or waive the claimed confidentiality. Unless such protective order is obtained and provided to the Port by the stated deadline, the Port will release the requested portions of the Proposals. By submitting a response the vendor assents to the procedure outlined in this paragraph and shall have no claim against the Port on account of actions taken under such procedure.

ATTACHMENT B

Port of Tacoma Terms And Conditions Personal Services Agreement

In consideration of the mutual covenants, obligations, and compensation to be paid by the Port to Consultant, it is agreed that:

1. Key Personnel

The Consultant and/or its subconsultants' key personnel, as described in its Consultant selection submittals, shall remain assigned for the duration of the Project unless otherwise agreed to by the Port.

2. Relationship of the Parties

Consultant, its subconsultants and employees, is an independent Contractor. Nothing contained herein shall be deemed to create a relationship of employer and employee or of principal and agent.

3. Conflicts of Interest

Consultant warrants that it has no direct or indirect economic interest which conflicts in any manner with its performance of the services required under this Agreement. Consultant warrants that it has not retained any person to solicit this Agreement and has not agreed to pay such person any compensation or other consideration contingent upon the execution of this Agreement.

4. Compliance with Laws

Consultant agrees to comply with all local, state, tribal and federal laws and regulations applicable to the project, including building codes and permitting regulations existing at the time this Agreement was executed and those regarding employee safety, the work

place environment, and employment eligibility verifications as required by the Immigration and Naturalization Service. Consultant shall obtain all professional licenses and permits required to complete the scope of work as defined.

5. Records and other Tangibles

Until the expiration of six years after the term of this Agreement, Consultant agrees to maintain accurate records of all work done in providing services specified by the Agreement and to deliver such records to the Port upon termination of the Agreement or otherwise as requested by the Port.

6. Ownership of Work

The services to be performed by Consultant shall be deemed instruments of service for purposes of the copyright laws of the United States. The Port has ownership rights to the plans, specifications, and other products prepared by the Consultant. Consultant shall not be responsible for changes made in the models, programs, reports or other products by anyone other than the Consultant. Consultant shall have free right to retain, copy and use any tangible materials or information produced but only for its own internal purposes. Use of models, programs, reports or other products prepared under this Agreement for promotional purposes shall require the Port's prior consent.

7. Disclosure

All information developed by the Consultant and all information made available to the Consultant by the Port,

and all analyses or opinions reached by the Consultant shall be confidential and shall not be disclosed by the Consultant without the written consent of the Port.

8. Compensation

As full compensation for the performance of its obligations of this Agreement and the services to be provided, the Port shall pay Consultant as specified in the Agreement.

9. Payment Schedule

Consultant shall submit detailed numbered invoices showing contract number, description of work items being invoiced, title of project, total authorized, total current invoice, balance of authorization, labor categories, hours, and hourly rate by the 10th of the month to be paid by the end of the current month, unless other terms are agreed to by the parties.

10. Costs and Disbursements

Consultant shall pay all costs and disbursements required for the performance of its services under this Agreement.

11. Insurance - Assumption of Risk

a) As a further consideration in determining compensation amounts, the Consultant shall procure and maintain, during the life of this Agreement, such commercial general and automobile liability insurance as shall protect Consultant and any subconsultants performing work under this Agreement from claims for damages from bodily injury, including death, resulting there from as well as from claims for property damage which may arise under this Agreement, whether arising from operations conducted by the Consultant, any

subconsultants, or anyone directly or indirectly employed by either of them.

- b) With respect to claims other than professional liability claims, Consultant and its subconsultants agree to defend, indemnify and hold harmless the Port of Tacoma, its appointed and elective officers and its employees from and against any and all suits, claims, actions, losses, costs, penalties and damages of whatever kind and nature, including attorney fees and costs by reason of any and all claims and demands on it, its officers and employees, arising from the negligent acts, errors or omissions by the Consultant in the performance of the Consultant's professional services.
- c) With respect to professional liability claims only, Consultant and its subconsultants agree to indemnify and hold harmless the Port of Tacoma, its appointed and elective officers and its employees from and against any and all suits, claims, actions, losses, costs, penalties and damages of whatever kind and nature, including attorney fees and costs by reason of any and all claims and demands on it, its officers and employees, arising from the negligent acts, errors or omissions by the Consultant in the performance of the Consultant's professional services.

12. Standard of Care

Consultant shall perform its work to conform to generally accepted professional standards. Consultant shall, without additional compensation, correct or revise any errors or omissions in such work.

13. Time

Time is of the essence in the performance by the Consultant of the services required by this Agreement.

14. Assignability

Consultant shall not assign any interest in this Agreement and shall not transfer any interest in the Agreement to any party without prior written consent of the Port.

15. Term of this Agreement

The effective dates of this Agreement are as specified. This Agreement may be terminated by the Port for cause when the Port deems continuation to be detrimental to its interests or for failure of the consultant to perform the services specified in the Agreement. The Port may terminate this Agreement at any time for government convenience in which case it shall provide notice to the Consultant and reimburse the Consultant for its costs and fees incurred prior to the notice of termination.

16. Disputes

If a dispute arises relating to this Agreement and cannot be settled through direct discussions, the parties agree to endeavor to settle the dispute through a mediation firm acceptable to both parties, the cost of which shall be divided equally. The Port reserves the right to join any dispute under this Agreement with any other claim in litigation or other dispute resolution forum, and the Consultant agrees to such joinder, so that all disputes related to the project may be consolidated and resolved in one forum. Venue for any litigation shall be the Pierce County Superior Court of the state of Washington and the prevailing party shall be entitled to recover its costs and reasonable attorney's fees.

17. Extent of Agreement

This Agreement represents the entire and integrated understanding between the Port and Consultant and may be amended only by written instrument signed by both the Port and Consultant.

ATTACHMENT C
REFERENCES QUESTIONNAIRE

INSTRUCTIONS TO THE PROPOSER:

Proposers are allowed three (3) completed reference questionnaires. The completed references questionnaires must be from individuals, companies, or agencies with knowledge of the proposer's experience that is similar in nature to the products or services being requested by this RFP, and are within the last 3 years from the date this RFP was issued.

References not received prior to the RFP Closing Date and time will receive a score of "0" for that reference. References outside the 3 of years, and references determined to be not of a similar nature to the products or services requested by this RFP will also receive a score of zero (0) points. **Determination of similar will be made by using the information provided by the reference in Section II of the Reference Questionnaire, General Information and any additional information provided by the reference.**

If more than three (3) qualifying references are received, the first three (3) fully completed references received will be used for evaluation purposes. References will be averaged.

1. Proposers must complete the following information on page 2 of the "Reference's Response To" document before sending it to the Reference for response.
 - a. Print the name of your reference (company/organization) on the "REFERENCE NAME" line.
 - b. Print the name of your company/organization on the "PROPOSER NAME" line.
 - c. Enter the RFP Closing date and time in Instruction 5 (see the INSTRUCTIONS block.)
2. Send the "Reference's Response To" document to your references to complete.

NOTE: It is the proposer's responsibility to follow up with their references to ensure timely receipt of all questionnaires. Proposers may e-mail the Procurement Representative prior to the RFP closing date to verify receipt of references.

**REFERENCE QUESTIONNAIRE
REFERENCE'S RESPONSE TO:
RFP Number: 070082
RFP Title: Real Estate Management System**

REFERENCE NAME (Company/Organization): _____

PROPOSER NAME (Company/Organization): _____ has submitted a proposal to the Port of Tacoma, provide the following services: Real Estate Management System. We've chosen you as one of our references.

INSTRUCTIONS

1. Complete **Section I. RATING** using the Rating Scale provided.
2. Complete **Section II. GENERAL INFORMATION** (*This section is for information only and will not be scored.*)
3. Complete **Section III. ACKNOWLEDGEMENT** by manually signing and dating the document. (*Reference documents must include an actual signature.*)
4. E-mail **THIS PAGE** and your completed reference document, **SECTIONS I through III** to:

Procurement Representative: Heather Shadko

E-mail: procurement@portoftacoma.com
5. This completed document **MUST** be received no later than **March 24, 2015 at 2:00 p.m.** (Pacific Time). Reference documents received after this time will not be considered. **References received without an actual signature will not be accepted.**
6. DO **NOT** return this document to the Proposer.
7. In addition to this document, the Port may contact references by phone for further clarification if necessary.

Section I. RATING

Using the Rating Scale provided below, rate the following numbered items by circling the appropriate number for each item:

Rating Scale	
Category	Score
Poor or Inadequate Performance	0
Below Average	1 – 3
Average	4 – 6
Above Average	7 - 9
Excellent	10

Circle **ONE** number for each of the following numbered items:

[SAMPLE QUESTIONS PROVIDED; REVISE QUESTIONS TO FIT YOUR RFP]

1. Rate the overall quality of the firm's services for changes or maintenance issues:

10 9 8 7 6 5 4 3 2 1 0

2. Rate the response time of this firm:

10 9 8 7 6 5 4 3 2 1 0

3. Rate how well the agreed upon, planned implementation schedule was consistently met and deliverables provided on time. *(This pertains to delays under the control of the firm):*

10 9 8 7 6 5 4 3 2 1 0

4. Rate the overall customer service and timeliness in responding to customer service inquiries, issues and resolutions:

10 9 8 7 6 5 4 3 2 1 0

5. Rate the knowledge of the firm's assigned staff and their ability to accomplish duties as contracted:

10 9 8 7 6 5 4 3 2 1 0

6. Rate the accuracy and timeliness of the firm's billing and/or invoices:

10 9 8 7 6 5 4 3 2 1 0

7. Rate the firm's ability to quickly and thoroughly resolve a problem related to the services provided:

10 9 8 7 6 5 4 3 2 1 0

8. Rate the firm's flexibility in meeting business requirements:

10 9 8 7 6 5 4 3 2 1 0

9. Rate the likelihood of your company/organization recommending this firm to others in the future:

10 9 8 7 6 5 4 3 2 1 0

Section II. GENERAL INFORMATION

1. Please include a brief description of the services provided by this firm for your business:

2. During what time period did the firm provide these services for your business?

Month:_____ Year:_____ to Month:_____ Year:_____

Section III. ACKNOWLEDGEMENT

I affirm to the best of my knowledge that the information I have provided is true, correct, and factual:

Signature of Reference

Date

Print Name

Title

Phone Number

Email Address

Attachment D - Solution Requirements

The following table provides a summary of the minimum, high level, requirements of a Real Estate Management system. The Port of Tacoma Real Estate Department manages approximately 150 active leases for land, office and warehouse space in Tacoma, WA.

Requirement	Met	Not Met	Description of How Requirement is Met, including Restrictions and Exceptions
Real Estate Requirements:			
Provides the ability to create and manage Real Estate Leases, Properties, and Billing.			
Properties / Leases are searchable by tenant, county parcel, Port parcel, and common address. Includes standard data fields for: <ul style="list-style-type: none"> • Street Address • Lessee ID • Lessee Name • Type of Lease (M to M, Term Lease, Hold Over) • Option to Extend • Date of Start of Lease • Date of Lease Termination • Monthly Rent (Building , Land, Easement, Cell Tower, Sign) forecast monthly amount for 5 years or duration of lease • Other Rent (Equipment, Wharfage, Dockage) forecast monthly amount for 5 years or duration of lease 			
Provides the ability to escalate leases based on timing and methods set forth in agreements, such as: <ul style="list-style-type: none"> • Escalation Type (CPI-U, Fixed %, Min/Max, Date of Escalation Anniversary) 			
Allows categorization of property by property type.			

Provides the ability to store insurance information.			
Provides the ability to store security deposit information.			
Provides the ability to store property deed information.			
Provides the ability to create and store/maintain lease abstracts.			
Provides the ability to store easement and encumbrance information related to leases or properties, and where needed account for them (payments, etc.).			
Provides Document Management and Records Management functionality including advanced search capabilities.			
Provides the ability to archive past tenant information.			
Provides a workflow, escalation or alerting capabilities, such as: <ul style="list-style-type: none"> • Renewal reminder triggers for insurance. • Reminders for security deposits. • Reminders for all escalations (and related items). • Reminders for regularly scheduled inspections. 			
Provides the ability to distribute Automatic Notifications for key events such as when new leases are signed, leases are terminated, etc., to specified stakeholders.			
Provides a capability for reporting items coming due in the coming month, including rents and other charges.			
Provides ability to facilitate verification of first month rent, insurance certificates and approved security deposit collection before occupancy.			
Provides ability to facilitate Tenant move-in inspection, including recording property condition both narratively and with digital photos.			
Provides the ability to track property projects, including the following data points: start date, incremental steps, current status, and completion date.			
Provides a capability to track and maintain a log of tenant interactions.			

<p>Provides basic asset management functionality:</p> <ul style="list-style-type: none"> • Track and schedule repairs and inspections • Track expected useful life for major building or property systems, components, assets, etc. • Track historical repairs and capital improvements. 			
<p>Provides a Prospect tracking capability, to track & store prospect contact and interaction information.</p>			
<p>Provides Reports/Reporting capabilities to create reports, such as:</p> <ul style="list-style-type: none"> • Inventory Report by type (office, warehouse, land) with various characteristics: <ul style="list-style-type: none"> ➤ Size parameters (square footage, acreage, etc.) ➤ Rail access ➤ Water access ➤ Heavy lift ➤ Paved, gravel or dirt surface ➤ Warehouse parameters – level entry, dock height, ceiling height • Property Utilization Report by category – warehouse, land (yard), office • Occupancy/Vacancy Report – trend line analysis. • Capital Improvements / major repair history. • Building stacking chart • Lease Expiration Report – Property Availability report. • Hold Harmless Expirations • Insurance due dates. We normally have three policies per lease. • Rent escalation dates and calculations • Rent Roll Reports 			

<ul style="list-style-type: none"> Security deposit expiration and/or escalation (bonds, cash, secured CD) 			
Provides advanced graphical reporting capabilities.			
Reports are downloadable to Microsoft Excel.			
Provides the ability to create forms such as: <ol style="list-style-type: none"> Property Inquiry – completed by prospect (paper and electronic) Property Flyers Tenant Contact Form – All tenant contact and emergency contact information. Tenant Use Statement. Hold Harmless Agreements – provide tenants and contractors temporary access. Tenant Improvement Requests Maintenance Matrix Lease templates (month to month, Long-term, terminal) that can be “auto-populated” Lease Abstract providing a summary of individual leases and/or tenants. Template letters – security deposit, insurance issues, escalations, late payments, other miscellaneous notices. Term Sheets 			
Technical Requirements:			
Solution is Software as a Service (SaaS), cloud based, or otherwise off-premise hosted.			Failure to meet this requirement will eliminate proposals from consideration.
Data centers utilized are located within the United States.			
Data centers, server, storage, and network infrastructure utilized provide high levels of redundancy and availability.			

Network, server and storage infrastructure is actively monitored and managed for availability and performance.			
All solution components, including the code base, application, servers, web servers, databases, data at rest and in motion, and network infrastructure including firewalls, are developed, configured and maintained using industry standard cybersecurity best practices.			
Service Level Agreement provides for monthly 99.9% uptime guarantee with service credits if missed.			
Technical Support is available 07:00 to 18:00 PST/PDT.			
System provides a Mobile capability accessible through Windows, iOS and Android mobile device app's or mobile browsers and allowing access to property information, drawings, and other information stored in the system.			
System provides the ability to work offline and synchronize information when reconnected.			
Data Management Requirements:			
Allows bi-directional automated data transfers between the proposed system and other Port databases.			
Utilizes Web Services and/or published API's to maintain business rules and application logic.			
Provides an interface to the Port's ArcGIS database for the display of GIS maps and data layers within the proposed solution.			
Accommodates the Port's data structure for Asset Management data, consisting of the following object hierarchy: Parcel, Location, Space, Lease, and Lease Line.			
All software components can be used independently of other components without compromising overall system functionality.			
Accommodates Omni Class Construction data classification system.			

Solution utilizes a role-based access control security authentication/access model.			
Budgeting Requirements:			
Provides the capability to assist in budgeting future revenues.			
Provides the capability to use system data for projecting future revenues based on lease criteria (i.e. CPI, and other factors in the lease).			
Provides the ability to access system data for use within the Port's budgeting software system, Prophix, through an integration, ETL process, etc.			
Finance Requirements:			
Ability to support some form of Integration with GP for Billing (push or pull data)			
Ability to create custom Finance reports.			
Ability to project revenues, by period, for the life of each lease and summarize in a report.			
Ability to budget revenues by property, by period, and summarize in a report.			
Ability to produce budget vs. actual reporting for revenues by property, period, location, etc.			
Billing Requirements:			
Ability to process monthly rent billing showing detailed statement for various leased parcels, buildings, equipment, etc., and with appropriate general ledger distribution.			
Ability to generate Utility billing by lease on an allocated basis.			
Ability to generate and output a batch billing invoice data file.			
Ability to bill mid-month and manually bill anytime.			
Ability to handle Special billings (Balloon payments, reset to market rates).			

