



**PORT OF TACOMA
REQUEST FOR PROPOSALS
No. 069275**

PROJECT MANAGER – SOFTWARE SYSTEMS

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

RFP INFORMATION	
Contact:	Nadine Bonds, Procurement
Email Addresses:	procurement@portoftacoma.com
Phone:	(253) 383-5841
Submittal Date	FEBRUARY 10, 2011 @ 4:00 PM (PST)

***PLEASE SUBMIT ALL CORRESPONDENCE AND PROPOSALS VIA E-MAIL
DIRECTLY TO THE PROCUREMENT SPECIALIST LISTED ABOVE AND
INCLUDE 'PROJECT MANAGER – SOFTWARE SYSTEMS' IN THE SUBJECT LINE***

PORT OF TACOMA
Request for Proposals (RFP)
Project Manager – Software Systems

A. BACKGROUND

A major gateway to Asia and Alaska, the Port of Tacoma (Port) is a leading North American seaport, handling more than \$25 billion in trade and 1.5 million TEUs (20-foot equivalent units) in 2009.

The Port is among the top 10 container ports in North America, as well as a major center for bulk, breakbulk and project and heavy-lift cargoes, and automobiles and medium-duty trucks.

Located on Commencement Bay, a natural, deep-water harbor in Southern Puget Sound, the Port of Tacoma is an independent municipal corporation that operates under state-enabling legislation. Created by Pierce County citizens in 1918, the Port has 2,400 acres (972 hectares) that are used for shipping terminal activity and warehouse, distributing, and manufacturing.

More information on the Port is available on our website at www.portoftacoma.com .

The Port is soliciting proposals for Consultants interested in providing Project Management services for Port software systems integrations, implementations, and upgrades.

B. SCOPE OF SERVICES

The Port has plans for multiple software system integrations, implementation and upgrade projects starting in 2011. The selected Consultants will work as an independent contractor and provide Project Management expertise in the management of these projects.

Equipment / Work Space

To ensure the security of the Port's computer network, computer equipment will be provided for the services required in this RFP. All other equipment will be the Consultant's responsibility to obtain. Work space may be available, depending on the Port's availability, but will not be dedicated for the services required.

Contract Term

The Port will issue 2 separate contracts from this RFP. One contract will focus on finance systems projects. The second contract will focus on all other non-finance system projects. The term for these contracts will depend on the Port's requirements and needs for these services, but are anticipated to be between 4 to 8 months in duration. The Port is expecting Consultants will work 40 hours a week; this may vary depending on the Port's staff workload and scheduling.

Required Experience

Consultants must have the following experience:

- Project Management of software integration, implementation, and upgrade projects. Project Management training and certifications preferred.
- Leading and managing approaches, deliverables, decisions, communications and logistics of software integration, implementation, and upgrade projects.
- Planning, execution and management of assigned projects, including meeting facilitation, issue management, and resource allocations.
- Managing stakeholders expectations.
- Developing project documentation, including, but not limited to Project Charters, scope of services for Request for Proposals, Issues Log's, Project Plans, etc.
- Business Process Analysis, requirements definition, and process and systems design.
- Minimum of 6 years of increasingly responsible experience in Project Management including working with Enterprise class systems and operations.
- Demonstrate enthusiasm, vitality and creativity as well as a strong customer service attitude.
- Treat all individuals with courtesy, dignity and respect.
- Actively support and clearly communicate the goals, objectives and strategies of the IT department and the organization.

Additional preferred experience for Consultants interested in providing Project Management services for non-finance related systems are:

- Experience managing projects to implement or upgrade Microsoft SharePoint 2010 Intranet sites
- Experience managing projects to implement or upgrade Logistic yard operations systems projects

Additional preferred experience for Consultants interested in providing Project Management services related to finance systems are:

- Experience working directly with Finance department staff
- A solid understanding of finance processes and functions.
- Experience managing projects for finance related business functions including treasury and budget systems.

C. DELIVERABLES:

Deliverables will include, but are not limited to project documentation, including project plans containing project schedules, work breakdown structure (WBS), resource requirements, weekly status reports, issue logs and technical and functional reference documentation.

D. COMPENSATION:

Please present detailed information on the Consultant's proposed fee structure for the services proposed. Travel costs will not be reimbursed under this solicitation. Proposed hourly rates and price schedule should be broken down for each of the proposed key personnel, including any discounts for minimum or fixed scopes. Please specify any additional fees, charges, expenses that are, or may be, billable to the Port according to the Port's Reimbursable Guidelines (Attachment B). All rates quoted shall be full cost and include all taxes and other government fees, and shall be valid throughout the contract period unless otherwise amended and agreed to by both parties in writing.

E. PROPOSAL ELEMENTS:

Interested Consultants are encouraged to submit qualifications and experience in a brief, concise Proposal. Proposals are limited to 10 numbered pages (8 ½ by 11 inch) **excluding** the cover letter and appendices. **Proposals that exceed 10 pages will not be reviewed.** Resumes are not included in the page count but may be added as an appendix using a maximum of 3 pages per prospective Consultant. At a minimum, proposals should address:

1. Specify if you are proposing for finance projects, non-finance projects, or both;
2. The Consultant's ability to perform the scope of services, including availability, education, registrations, certifications, and experience;
3. Business Process Analysis experience;
4. Consultant's experience in performing the tasks similar to those identified under the Scope of Services. If applicable, include experience of working directly with, and managing projects for finance related business functions. Provide a maximum of 2 resumes of prospective candidates for each project(s) you are proposing too;
5. Ability of the Consultant to communicate and work effectively with client firms, regulators and other stakeholders involved in the work. Describe your proposed method for ensuring ongoing client and Consultant satisfaction throughout the engagement;
 - a) If Consultant is hired through a firm, describe how the firm will manage issues and problems that may arise between the Consultant and Port;
6. Commitment of the Consultant to meet scope of services;
7. List of recent projects in the last 3 years, to include a point of contact, contact information and brief description for services relevant to the items listed in the Scope of Services as performed by the key personnel. Only projects completed by the Consultant will be considered;
8. The firm's claim history. Describe any claim submitted by the firm to any client, or submitted by any client against the firm, within the past 2 years related to the professional 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 10% of the firm's fee for the services provided;
9. List any exceptions your firm may have to accepting the Port's standard Terms and Conditions (Attachment A). Describe the nature of any exceptions to the Port's standard Terms and Conditions and firm's proposed alternative.

F. PROCUREMENT PROCESS

Issuance of RFP	JANUARY 27, 2011
Proposal packets due	FEBRUARY 10, 2011 @ 4:00 PM (PST)
Short List Consultants	FEBRUARY 16, 2011
Interviews (if required)	FEBRUARY 22 & 23, 2011
Execute Contract	MARCH 7, 2011

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 'Business Opportunities'; Professional and Personal Services; Current Opportunities.

To document interest in a project, the Port strongly encourages Submitters to email the Port at procurement@portoftacoma.com (Firm Name and Solicitation Name in subject line) to request placement on the document Holders List for this solicitation. Provide the Main Contact Name, Address, Email, and Phone number to be included on the RFP Holders List. Firms requesting to be placed on the Holders List will receive electronic notification regarding any issued addenda or other important information concerning the solicitation.

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.

COMMUNICATION / INQUIRES

All communication and inquiries shall be sent to procurement@portoftacoma.com. Proposer's who, relative to this scope of work, contact any individuals or Commission members representing the Port, other than procurement@portoftacoma.com, may be disqualified from consideration. No oral answers will be binding by the Port.

INTERPRETATIONS

Written questions about the meaning or intent of the Solicitation Documents shall only be submitted to Nadine Bonds, procurement@portoftacoma.com (Firm Name and Solicitation Name in subject line). Submitters who may have questions about provisions of these documents are to email their questions at least **four (4) calendar days** prior to the deadline for submittals. The Port will respond to all written questions submitted.

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 to all bidders by a formal, written addendum. If at any time, the Port changes, revises, deletes, clarifies, increases, or otherwise modifies the Solicitation, the Port will issue a written Addendum to the Solicitation. Addenda will be posted at the Port's web site and conveyed to those potential submitters who have requested to be placed on the Holder's List.

EVALUATION CRITERIA AND AWARD PROCESS

An evaluation team will review the proposals and evaluate all responses received based upon the criteria listed herein. The Port may request clarifications or additional information, if needed. A selection may be made based on the evaluation criteria alone or a combination of the evaluation criteria, references, and interviews.

The criteria outlined below will be used to evaluate the proposals and determine the **best value proposal**. A total of 150 points (excluding the potential for references and interviews) has been assigned to the Evaluation Criteria. Evaluators will use the points to score each proposal.

If applicable, the evaluation team will use the proposals to narrow the field to a short list of finalists. Finalists may have references checked and be scheduled for an interview by the Port. Results of the reference checks will have a Pass/Fail score and interviews will have a maximum of 100 points. Failure to participate in the interview process will result in a Proposer's disqualification from further consideration.

Finalists points will be added to the Evaluation Criteria for a total possibility of 250 points. The Port intends to select the best value Proposer and begin negotiations based on the highest scores.

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.

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 selected firm and proceed with negotiations.

Evaluation Criteria

		Weighting
1.	Knowledge and experience of the Consultant to perform software implementation and upgrade projects	0 – 25
2.	Experience of the Consultant in performing the services requested in the scope of service	0 – 35
3.	Experience in performing Business Process Analysis	0 – 20
4.	Ability of the Consultant to communicate effectively with all stakeholders	0 – 15
5.	Commitment to meeting scope and availability for work assigned	0 – 20
6.	Cost Proposal	0 – 25
7.	Accuracy and completeness of the proposal submitted.	0 – 10
	Total	150 Points

Finalists (if applicable)

1.	Results of reference checks for finalists	Pass/Fail
2.	Results of interviews for finalists	0 – 100
	Total	100 Points

G. 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, Project Manager – Software Systems (Subject Line)

Please submit 1 electronic copy in Adobe Acrobat PDF format, including all appendices. Submittals need to be limited to **8 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.

H. GENERAL INFORMATION

TRANSPORTATION WORKER IDENTIFICATION CREDENTIAL (TWIC)

The Port does not anticipate the need for consultants to obtain a TWIC card. Should it become necessary, the following will apply:

TWIC is a credentialing program managed by the Department of Homeland Security (DHS), through the United States Coast Guard and the Transportation Security Administration. All credentialed merchant mariners and individuals who will need unescorted access to secure areas of a maritime regulated facility or vessel must obtain a TWIC. For more information on TWIC visit www.tsa.gov/twic.

The Consultant shall have a minimum of one TWIC compliant employee trained as an escort for every five workers not possessing TWIC cards working on a secured or restricted site. Each escort will be required to receive Terminal Operator provided escort training.

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 vendor 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 "BUSINESS SECRET". If a request is made for disclosure of such portion, the Port will determine whether the material should be made available under the law. If the material is not exempt from public disclosure law, the Port will notify the vendor of the request and allow the vendor five (5) days to take whatever action it deems necessary to protect its interests. If the vendor fails or neglects to take such action within said period, the Port will release the portions of the Qualifications deemed subject to disclosure. 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 A – PORT OF TACOMA TERMS AND CONDITIONS

ATTACHMENT B – REIMBURSABLE GUIDELINES

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. Compensation for vehicle usage will be paid at the current Internal Revenue Service allowable mileage reimbursement rate. Consultant's expenses will be reimbursed at cost, subject to attached guidelines, with the exception of all third party costs which will be reimbursed at cost plus the negotiated percentage markup.

9. Payment Schedule

Consultant shall submit detailed numbered invoices showing description of work items being invoiced, work order number, title of project, total authorized, total current invoice, balance of authorization, individual's names and titles, hours, hourly rate and all authorized expenses itemized, with backup, in accordance with the Port's "Guidelines for

Port of Tacoma Terms And Conditions

Personal Services Agreement

Consultant Fees and Reimbursable Items”, 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

Port of Tacoma Terms And Conditions Personal Services Agreement

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.

Port of Tacoma Guidelines for Consultant Fees and Reimbursable Items

General Considerations

These guidelines are intended to assist consultants in developing fee proposals; exceptions may be appropriate for the particular scope of work and should be specifically negotiated.

Rates and multipliers will remain in effect for the contract term unless renegotiated and agreed to by both parties in a written change order.

No overtime rates of pay will be paid.

Hourly Rates And Expenses

The Port expects that the proposed hourly rates or multiplier of hourly rates include all routine overhead and internal expenses of the consultant. Inclusion of expenses in the hourly rate or multiplier reduces the amount of backup documentation required to support each invoice and expedites payment.

The Port expects that the proposed hourly rate includes the equipment, tools, software and supplies required to perform the work.

Hourly rates should be identified for all classifications anticipated to be itemized on the consultant's invoice.

Reimbursables

The Port will reimburse the following expenses at cost (**when appropriate backup is provided**):

1. Printing of review and final sets of deliverables; all deliverables shall also be provided on formatted disk at no additional charge.
2. Postage/shipping cost for deliverables
3. Film development
4. Mileage at \$.505/mile
5. Long distance telephone charges
6. Computer disks

Project field supplies consumed in the work will be reimbursed at cost plus 8% markup.

Unless specifically negotiated, **the Port will not separately reimburse the firm for routine overhead and internal expenses**, including:

1. Computer software or hardware usage
2. Graphics supplies or plotter use
3. Digital camera or batteries usage
4. Communications (except long distance) including: Cell phone rental; Fax transmissions; and routine postage or courier.
5. Routine reproduction or copying, except for deliverables (see reimbursables)

Lab Samples and Analysis

The unit price should include analytical costs. Sampling should be scheduled to ensure that results are received when required at normal turnaround rates. 24-hour or rush turnaround rates will be paid only when specifically requested by the Port. Lab services provided by a third party will be reimbursed at cost plus 8% markup.

Subcontracted Services

When specifically negotiated with the Port, subcontracted services will be reimbursed at cost plus 8% markup.

Invoice Format Guidelines

Invoices must be numbered in a format that shows the firm's unique sequential numbering system for invoicing.

Invoices should show description of work items being invoiced, work order number, Contract number, title of project, total authorized, total current invoice, balance of contract, individual's names and titles, hours at hourly rate, authorized expenses itemized with backup. When applicable, the invoice must show the percentage completion of each task within the scope of work. Payment will not exceed the percentage of work completed.