



**PORT OF TACOMA  
REQUEST FOR PROPOSALS  
No. 070159**

**ENTERPRISE GIS SYSTEM AND DATA  
SERVICES**

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

<b>RFP INFORMATION</b>	
Contact:	Heather Shadko, Procurement
Email Addresses:	<a href="mailto:procurement@portoftacoma.com">procurement@portoftacoma.com</a>
Phone:	(253) 428-8697
Submittal Date	<b>JUNE 10, 2016 @ 2:00 PM (PST)</b>

**PLEASE SUBMIT ALL CORRESPONDENCE AND PROPOSALS  
VIA E-MAIL DIRECTLY TO THE PROCUREMENT CONTACT LISTED ABOVE  
AND INCLUDE 'ENTERPRISE GIS SYSTEM AND DATA SERVICES' IN THE  
SUBJECT LINE**

PORT OF TACOMA  
Request for Proposals (RFP) #070159  
Enterprise GIS System and Data Services

The Port is soliciting proposals from firms interested in providing consulting and technical support services relating to the Port's Enterprise GIS on an as-needed basis. The Port licenses Esri's ArcGIS suite of software, Latitude Geocortex Essentials, and NSG Port Solution.

**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.

The ports of Seattle and Tacoma joined forces in August 2015 to form The Northwest Seaport Alliance, unifying management of their marine cargo facilities and business to strengthen the Puget Sound gateway and attract more marine cargo and jobs for the region. The NWSA is the first of its kind in North America. The third-largest container gateway in North America, the NWSA delivers less congestion, closer proximity to Asia and award-winning ease of doing business.

Marine cargo operations in the north and south harbors supported more than 48,000 jobs in 2013, generating nearly \$4.3 billion in economic activity. That same year, maritime cargo activity generated \$379 million in state and local taxes, which support education, roads and police and fire protection in communities.

To learn more about the Port of Tacoma and The Northwest Seaport Alliance, visit [www.portoftacoma.com](http://www.portoftacoma.com) and [www.nwseaportalliance.com](http://www.nwseaportalliance.com).

The Port of Tacoma currently utilizes Esri ArcGIS (for Server, for Desktop, and Online) to map the Port's assets, infrastructure, and geographic information, and display this information. The Port uses Latitude's Geocortex Essentials solution as a development platform for GIS applications built on top of Esri ArcGIS viewers, and uses the NSG Port Solution, a set of third-party viewer application tools. The Port intends to build integrations with other enterprise systems and expose data and applications to the public in the future.

Enterprise GIS was implemented at the Port in 2009. The Port upgraded from ArcGIS 10.1 to ArcGIS 10.2 in 2014, and upgraded to the version 10.3.1 in 2016. Geocortex Essentials and the NSG Port Solution were both implemented in 2014. The Port of Tacoma's Enterprise GIS implementation is currently on-premise, with a small subscription to ArcGIS Online.

Since 2013, the Port has utilized the services of third party Esri Partners to provide Enterprise GIS services related to security projects through FY 2011 and FY 2014 Port Security Grant Program (PSGP) funding. The Port has an in-house Information

Technology department and in-house technical and functional resources responsible for the support of GIS.

Attachment A to the RFP contains the Instructions and Information for proposing to the solicitation.

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. Taking exceptions to these terms and conditions or conditioning your proposal on terms and conditions other than the Port's will render your proposal non-responsive.

### **B. SCOPE OF SERVICES:**

Through this RFP, the Port intends to competitively select up to four (4) qualified and experienced firms, up to two (2) per category listed below, to work with a defined scope on a task-order basis, with task-orders issued for services as-needed.

Anticipated projects are listed below. Scopes of work will be defined by the specific engagement:

#### Category A: Development and Support Services

- Solution consulting
- Solution designs
- System/Platform design
- System configuration
- Modified systems environments
- System documentation
- Software development
- Software testing
- Test plans
- Technical services
- Integration development
- Infrastructure design
- Break/fix support
- Escalated or advanced support
- Project Management
- Version upgrades
- Other related services as required

#### Category B: Data Services

- Data creation
- Data collection
- Data maintenance

- Project Management
- Database design
- Data Analysis
- Other related services as required

Contracts will be awarded by category. Firms must be able to perform all tasks in the category bid. Firms may submit proposals for either category or both.

The initial period of performance will be for one (1) year, with an option to extend for additional four 1-year terms up a maximum of five (5) years.

When the Port identifies a need for contracted GIS work a summary of the requirements will be sent to all selected firms using the Task Order in Attachment D. The requirements will include a description of the project along with a specific scope of work and any other pertinent information.

Available firms will submit proposals for completing the scope of work and include timelines and cost estimates. The Port will review submitted proposals and select a firm to complete the task. If multiple firms are available to complete the task, the Consultant's qualifications for the scope of work described, staff skill sets, availability and rates shall be considered during selection.

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

### **C. DELIVERABLES:**

Deliverables will vary based on the Task Order.

### **D. RFP ELEMENTS & EVALUATION CRITERIA:**

Proposals should present information in a straightforward and concise manner, while ensuring complete and detailed descriptions of the proposing team and the team's ability 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 12 numbered pages (8 ½ by 11 inch) **including** the cover letter and any submitted appendices, but **excluding** the compensation proposal and references. 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 may be deemed nonresponsive.

The cover letter shall include the RFP Title and Number, Name, Title, Email Address, Phone Number and Addresses 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.....30 PTS

- Describe the qualification and experience of the firm submitting the proposal, including:
  - Length of time in business; length of time offering services similar to those proposed.
  - Business history including patterns of growth, mergers or acquisitions; office locations.
  - Market/vertical specializations. Number and business type of customers. Describe why this experience is relevant to the Port of Tacoma.
  - Define any sub-consultants, and their roles and responsibilities.

- For Category A: Identify the level and type of Esri Business Partner relationship the firm submitting the proposal holds, and the length of time the firm has held this relationship.

- For Category A: Provide brief resumes of the Key Personnel of the firm (and any sub-consultants) with responsibilities for Esri and Geocortex services. Include working titles, degrees, certificates, licenses, training and technical experience. Key Personnel must have a minimum of five years of directly relevant experience performing work of similar type and complexity.

Desired Certifications and Training for Key Personnel include:

- Geocortex Essentials training (please state specific training taken)
- GIS Professional (GISP) Certification
- Project Management Institute - Project Management Professional (PMP)
- For Category B: Provide brief resumes of the Key Personnel of the firm (and any sub-consultants) with responsibilities for Esri services. Include working titles, degrees, certificates, licenses, training and technical experience. Key Personnel must have a minimum of two years of directly relevant experience performing work of similar type and complexity.

Desired Certifications and Training for Key Personnel include:

- GIS Professional (GISP) Certification
- Project Management Institute - Project Management Professional (PMP)
- Describe the organizational or team structure(s) of the Key Personnel.

2. Recent Projects.....30 PTS

- Include a list of contracts/projects in the last three years for services relevant to the Port of Tacoma and relevant to the items listed in the Scope of Services. Provide a description of the project deliverable, work conducted, services provided, and benefits attained. Additional relevant information includes the size of the project in budget and number of team members, size of customer, type of business or industry, number of change orders processed, and original and actual schedule.

3. Work Approach.....20 PTS

- 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.
- Assumptions and Risks: Define the factors the consultant believes are risks to the successful completion of Enterprise GIS projects and propose mitigation strategies.
- Coordination & Communication: Provide a plan for communications and coordination between the Consultants team and the Port.
- Task Order Services: Define the consultants experience providing task order type services.
- Technical Support: Define the consultants experience providing technical support services and describe the organizational support structures and processes established.

4. Compensation.....20 PTS

Present detailed information on the firm's proposed fee structure for the services proposed.

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

Include a Rate Sheet that specifies the labor category and hourly rate of each member of the proposed team, or of each specific project role.

All rates quoted shall be:

- **Fully burdened, including, but not limited to, per diem, administrative overhead, travel, lodging, and transportation (all direct/indirect expenses included); (Firms submitting for Category A must submit a fully burdened rate minus per diem, travel and lodging. Firms submitting for both categories may submit two rate sheets, one for each category.)**
- 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.....30 PTS

Ensure completion of a minimum of 3 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.

FINAL EVALUATION PHASE (if applicable)

6. Interviews (as requested by the Port).....100 PTS

If an award is not made based on the written evaluations alone, interviews 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. If interviews are conducted, they will be held at the Port of Tacoma, Tacoma, WA. Travel costs will not be reimbursed for the interview.

**ATTACHMENT A – INSTRUCTIONS FOR PROPOSING**

**ATTACHMENT B – PERSONAL SERVICES CONTRACT TEMPLATE & TERMS AND CONDITIONS**

**ATTACHMENT C – REFERENCE QUESTIONNAIRE**

**ATTACHMENT D – TASK ORDER**

## **PROCUREMENT PROCESS**

### **SOLICITATION TIMELINE:**

Issuance of RFP	MAY 13, 2016
Last Day To Submit Questions	MAY 26, 2016
<b>Proposal packets due</b>	<b>JUNE 10, 2016 @ 2:00 PM (PST)</b>
Short List Consultants*	JUNE 24, 2016
Interviews (if required)*	WEEK OF JULY 11, 2016
Final Selection*	JULY 18, 2016
Execute Contract*	AUGUST 2016

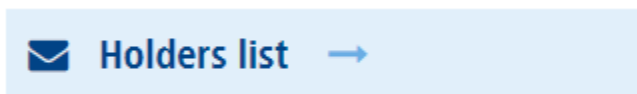
\*Dates are tentative.

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](http://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](mailto: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](mailto:procurement@portoftacoma.com).

Name of Firm, RFP Title (Subject Line)

Please submit proposal, including all appendices and compensation in separate Adobe Acrobat PDF format. 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

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### 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 description of work items being invoiced, title of project, total authorized, total current invoice, balance of authorization, by the 10<sup>th</sup> 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 "A"**

**HOURLY RATES**

**Consultant  
 Project Name**

<u>Personnel</u>	<u>Hourly Rates</u>
Sr. Consultant 2	\$
Sr. Consultant 1	\$
Consultant 2	\$
Consultant 1	\$
Project 2	\$

**All other fees will be paid per the Port of Tacoma Terms & Conditions.**

Additional labor categories are not authorized without prior written approval from the Port's Project Manager.

ATTACHMENT C  
REFERENCES QUESTIONNAIRE

**INSTRUCTIONS TO THE PROPOSER:**

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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 three years from the date this RFP was issued.

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: 070159  
RFP Title: GIS Service Support**

**REFERENCE NAME (Company/Organization):** \_\_\_\_\_

**PROPOSER NAME (Company/Organization):** \_\_\_\_\_ has submitted a proposal to the Port of Tacoma, provide the following services: Financial Audit Services. 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: Heather Shadko  
  
E-mail: [procurement@portoftacoma.com](mailto:procurement@portoftacoma.com)
5. This completed document **MUST** be received no later than **June 10, 2016 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

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

**Rating Scale**

<b>Category</b>	<b>Score</b>
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:

1. Rate the overall quality of the firm's services:

**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 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**

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

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

Month: \_\_\_\_\_ Year: \_\_\_\_\_ to Month: \_\_\_\_\_ Year: \_\_\_\_\_

**Section III. ACKNOWLEDGEMENT**

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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



# TASK ORDER

Contract Number: \_\_\_\_\_

GL/Project Number: \_\_\_\_\_

Task Number:

**Consultant Name:** \_\_\_\_\_

**Project Manager:** \_\_\_\_\_

**Scope of Work:** Short description of project work goes here.

**Estimated Time:** \_\_\_\_\_

**Rate Structure:** Task / Day / Hour (circle one)

**Rate:** \$ \_\_\_\_\_

**Project Estimate:** \$ \_\_\_\_\_

**Deliverables:** List of all deliverables are to be listed here.

**Revision?** Yes / No (circle one) Date: \_\_\_\_\_

\_\_\_\_\_  
Consultant Date

**Approved By:**

\_\_\_\_\_  
Project Manager Date