



**STATE PROCUREMENT OFFICE  
NOTICE & REQUEST FOR SOLE SOURCE**

TO: Chief Procurement Officer

FROM: Native Hawaiian Revolving Loan Fund  
*Name of Requesting Department*

*Pursuant to HRS §103D-306 and HAR chapter 3-122, Subchapter 9, the Department requests sole source approval to purchase the following:*

1. Describe the goods, services, or construction to be procured.  
Annually Cloud hosting products which allows for online applications and indicates status of application, workflow and task alert capabilities, provides latest version of all cloud based functions, and cloud based backups. Provide online and on-premises loan software support and maintenance, which includes, loan software upgrades (including the latest versions to all tax related documents), remote access to address any issues and/or questions, and remote access to loan structuring to address issues.

2. Vendor/Contractor/Service Provider Name: BMI Associates, Inc. dba Portfol Software	3. Amount of Request: \$8,000.00
4. Term of contract (shall not exceed 12 months), if applicable: From: <u>1-May-20</u> To: <u>31-Dec-20</u>	5. Prior SPO-001, Sole Source (SS) No.:

6. Describe in detail the following:

a. The unique features, characteristics, or capabilities of the goods, service or construction.  
The service provided will be for the Portfol loan software system, which BMI is the only organization that can provide services.

b. How the unique features, characteristics or capabilities of the goods, service or construction are essential for the department  
The NHRLF program would not be able to operate Portfol, which means the program could not longer process or service loans.

7. Describe the efforts and results in determining that this is the only vendor/contractor/service provider who can provide the goods, services or construction.

The NHRLF staff contacted the five loan software providers and none were licensed to provide services for Portfol. Also, discussed with the President of BMI and he indicted they had not lisensed anyone to provide technical assistance.

8. Alternate source. Describe the other possible sources for the goods, services, or construction that were investigated but did not meet the department's needs.

The NHRLF staff contacted Oracle, Turnkey Lender, Nothridge Lending System, Loan Pro Services, and Blend.

9. Identify the primary responsible staff person(s) conducting and managing this procurement. (Appropriate delegated procurement authority and completion of mandatory training required.)

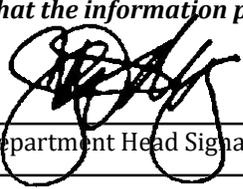
\*Point of contact (Place asterisk after name of person to contact for additional information).

Name	Division/Agency	Phone Number	E-mail Address
Charmaine Matsuura	OHA/Procurement	808-594-0273	<a href="mailto:charmainem@oha.org">charmainem@oha.org</a>

Department shall ensure adherence to applicable administrative and statutory requirements, including HAR chapter 3-122, Subchapter 15, Cost or Pricing Data if required.

**All requirements/approvals and internal controls for this expenditure is the responsibility of the department.**

**I certify that the information provided is to the best of my knowledge, true and correct.**

  
\_\_\_\_\_  
Department Head Signature

3/25/2020

\_\_\_\_\_  
Date

**For Chief Procurement Officer Use Only**

Date Notice Posted: \_\_\_\_\_

Submit written objection to this notice to issue a sole source contract within seven calendar days or as otherwise allowed from date notice posted to:

[state.procurement.office@hawaii.gov](mailto:state.procurement.office@hawaii.gov)

Chief Procurement Officer (CPO) Comments:

- Approved       Disapproved       No Action Required

\_\_\_\_\_  
*Chief Procurement Officer Signature      Date*