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.

Online and on-site loan software support and maintenance, loan software upgrades, latest version of tax-related documents, remote access to address any issues and/or questions, and remote access to loan structuring to address issues. Annual cloud hosting which allows for online applications and indicated status of application, workflow and task, alert capabilities, and latest version of all cloud-based functions and cloud-based backups.

2. Vendor/Contractor/Service Provider Name:	3. Amount of Request:
BMI Associates, Inc. dba Portfol Software	$0.00
4. Term of contract (shall not exceed 12 months), if applicable:	5. Prior SPO-001, Sole Source (SS) No.:
From: 10/28/2026 To: 11/02/2026	26-08

6. Describe in detail the following:

a. The unique features, characteristics, or capabilities of the goods, service or construction.

Support and maintenance of the Portfol Loan Software system of which BMI Associates, Inc. is the sole provider with the requisite proprietary rights, expertise, and capability to perform the required work per Sole Source No. 2020-05.

b. How the unique features, characteristics or capabilities of the goods, service or construction are essential for the department

The services provided are essential to ongoing operations. All Mālama loans are currently housed and managed within this system, making it a critical component of program functionality. Transitioning to another vendor at this time would result in significant service disruption, including potential impacts to loan servicing, data access, and program administration.

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 five loan software providers and one of these providers were licensed to provide services for Portfol Loan Software. BMI Associates Inc. confirmed there is no other vendor licensed to provide technical assistance for the Portfol Loan Software system as stated on Sole Source No. 2020-05.

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, Northridge Lending System, Loan Pro Services, and Blend as stated on the Sole Source No. 2020-05.

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
Alison Roney	*OHA Procurement*		*alisonr@oha.org*
*Chris Stanley**	*OHA Procurement*		*chriss@oha.org*

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

10/22/2026
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

Chief Procurement Officer (CPO) Comments:

☐ Approved ☐ Disapproved ☐ No Action Required

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Chief Procurement Officer Signature *Date*