



RFP No. TRN066

PROFESSIONAL, TECHNICAL AND EXPERT SERVICES

**City of Portland, Oregon
February 9, 2009**

REQUEST FOR PROPOSALS

for

Division Streetscape & Reconstruction Project

PROPOSALS DUE: March 2, 2009 by 4:00 p.m.

Envelope(s) shall be sealed and marked with RFP # and Project Title.

Submit one (1) original and five (5) complete copies of the Proposal to:

City of Portland
Bureau of Transportation
ATTN: Pat Boyd
1120 SW 5th Avenue, Room 900
Portland, OR 97204

Refer questions to:

Pat Boyd
Phone: (503) 823-7031
Fax: (503) 823-3453
Email : patrick.boyd@trans.ci.portland.or.us

GENERAL INSTRUCTIONS AND CONDITIONS

DIVERSITY IN EMPLOYMENT AND CONTRACTING REQUIREMENTS

The City of Portland seeks to extend contracting opportunities to Minority Business Enterprises, Women Business Enterprises and Emerging Small Businesses (M/W/ESBs) in order to promote their economic growth and to provide additional competition for City contracts. Therefore, the City has established an overall 20% utilization goal in awarding PTE contracts to ESBs. No goal is set for the use of M/WBE firms, but the City is committed to ensuring that such firms receive opportunities and equal consideration to be awarded City PTE contracts.

ENVIRONMENTALLY PREFERABLE PROCUREMENT

In accordance with the City's Sustainable City Principles and the City's Sustainable Procurement Policy, the City of Portland values the use of products or services that minimize the negative human health and environmental impacts of City operations. Therefore, proposers are encouraged to incorporate environmentally preferable products or services into their responses wherever possible. "Environmentally preferable" means products or services that have a lesser or reduced effect on human health and the environment when compared with competing products or services that serve the same purpose. This comparison may consider raw materials acquisition, production, manufacturing, packaging, distribution, reuse, operation, maintenance, or disposal of the product or service. To view the above City policies go to www.portlandonline.com and navigate to "Charter, Code & Policies Documents".

INVESTIGATION- The proposer shall make all investigations necessary to inform it regarding the service(s) to be performed under this request for proposal.

SPECIAL CONDITIONS - Where special conditions are written in the Request for Proposal, these special conditions shall take precedence over any conditions listed under the Professional, Technical and Expert Service "General Instructions and Conditions".

CLARIFICATION OF REQUEST FOR PROPOSAL- Proposers who request a clarification of the RFP requirements must submit questions in writing to the person(s) shown in the REFER QUESTIONS TO section on the cover of this RFP, or present them verbally at a scheduled pre-submittal conference, if one has been scheduled. The City must receive written questions no later than the date stated herein. The City will issue a response in the form of an addendum to the RFP if a substantive clarification is in order.

Oral instructions or information concerning the request for proposal given out by Bureau or Office managers, employees or agents to prospective proposers shall not bind the City.

ADDENDUM – Any change to this RFP shall be made by written addendum issued no later than 72 hours prior to the proposal due date. The City is not responsible for any explanation, clarification or approval made or given in any manner except by addendum.

COST OF PROPOSAL- This Request for Proposal does not commit the City to pay any costs incurred by any proposer in the submission of a proposal or in making necessary studies or designs for the preparation thereof, or for procuring or contracting for the services to be furnished under the request for proposal.

CANCELLATION – The City reserves the right to modify, revise or cancel this RFP. Receipt and evaluation of proposals or the completion of interviews do not obligate the City to award a contract.

LATE PROPOSALS- Proposals received after the scheduled closing time for filing will be returned to the proposer unopened.

REJECTION OF PROPOSALS- The City reserves the right to reject any or all responses to the Request for Proposal if found in the City's best interest to do so. In the City's discretion, litigation between the

City and a proposer shall be cause for proposal rejection, regardless of when that litigation comes to the City's attention and regardless how the consultant's proposal may have been scored. Proposals may also be rejected if they use subcontractors or subconsultants who are involved in litigation with the City. Proposers concerned about possible rejection on this basis should contact the City before submission of a proposal for a preliminary determination of whether its proposal will be rejected.

CITY OF PORTLAND BUSINESS LICENSE - Successful consultant shall obtain a current City of Portland Business License prior to initiation of contract and commencement of the work.

WORKERS COMPENSATION INSURANCE – the successful consultant shall be covered by Workers Compensation Insurance or shall provide evidence that State law does not require such coverage.

CERTIFICATION AS AN EEO AFFIRMATIVE ACTION EMPLOYER-

Proposers must be certified as Equal Employment Opportunity Affirmative Action Employers as prescribed by Chapter 3.100 of the Code of the City of Portland. The required documentation must be filed with the Bureau of Purchases, City of Portland, prior to contract execution.

EQUAL BENEFITS PROGRAM – Proposers must provide benefits to their employees with domestic partners equivalent to those provided to employees with spouses as prescribed by Chapter 3.100 of the Code of the City of Portland. The required documentation must be filed with the Bureau of Purchases, City of Portland, prior to contract execution.

CONFLICT OF INTEREST - A proposer filing a proposal thereby certifies that no officer, agent or employee of the City who has a pecuniary interest in this request for proposal has participated in the contract negotiations on the part of the City, that the proposal is made in good faith without fraud, collusion or connection of any kind with any other proposer of the same call for proposals, and that the proposer is competing solely in its own behalf without connection with or obligation to, any undisclosed person or firm.

CONFIDENTIALITY – All information submitted by proposers shall be public record and subject to disclosure pursuant to the Oregon Public Records Act (ORS 192.410 et seq.), except such portions of the proposals for which proposer requests exception from disclosure consistent with Oregon Law. Any portion of a proposal that the proposer claims constitutes a "trade secret" or is "confidential" must meet the requirements of ORS 192.501(2) and ORS 192.502(4). If the entire proposal is marked as constituting a "trade secret" or being "confidential," at the City's sole discretion, such a proposal may be rejected as non-responsive.

If a request to inspect the proposal is made, the City will notify the proposer of the request. If the City refuses to release the records, the proposer agrees to provide information sufficient to sustain its position to the District Attorney of Multnomah County, who currently considers such appeals. If the District Attorney orders that the records be disclosed, the City will notify the proposer in order for the proposer to take all appropriate legal action. The proposer further agrees to hold harmless, defend and indemnify the City for all costs, expenses and attorney fees that may be imposed on the City as a result of appealing any decision regarding the proposer's records.

The Purchasing Agent has the authority to waive minor irregularities and discrepancies that will not affect the competitiveness or fairness of the solicitation and selection process.

These Professional, Technical and Expert Services Request for Proposal "General Terms and Conditions" are not to be construed as exclusive remedies or as a limitation upon rights or remedies that may be or may become available under ORS Chapter 279.

PART I

CONTRACT REQUIREMENTS

SECTION A

GENERAL INFORMATION

1. INTRODUCTION

The Project Management Division of the Portland Bureau of Transportation oversees significant capital projects within the Transportation Capital Improvement Program (CIP). The program focuses on transportation projects that enhance neighborhood access and livability, preserve and rehabilitate facilities, and support land use through improvements to the city street structures system. Successfully managing multi-modal, high quality, customer-oriented projects delivered in a timely manner is our goal.

2. BACKGROUND

The *Division Streetscape and Street Reconstruction Project* stems from the Division Green Street / Main Street Plan. The Plan was a collaborative effort between the Portland Bureau of Transportation, the Bureau of Planning, private consultants, and the community to improve the livability and economic vitality of the SE Division Street corridor through land use, transportation, and economic development strategies.

Once constructed, the *Division Streetscape and Street Reconstruction Project* will provide the roadway infrastructure, streetscape and traffic safety improvements that will support the main street area and surrounding neighborhood. The project will complement the significant public/private investment already taking place in the neighborhood.

Division Street, between SE 11th and 39th, is an existing paved roadway that is shared between automobiles, trucks, bicyclists, and pedestrians. SE Division Street is a 60 foot right-of-way with 36 feet of pavement between curbs. Between SE 11th and SE 28th Place, the parking lane becomes a travel lane for the two-hour peak, in the peak direction – 7 to 9 AM westbound and 4 to 6 PM eastbound. SE Division Street is classified by the City of Portland as a Neighborhood Collector, Major Transit Priority Street, Local Service Bikeway, City Walkway, and Truck Access Street. The posted speed limit is 25 mph.

During the development of the Division Green Street / Main Street Plan, the community identified the desire to have a more transit-oriented, economically vibrant and environmentally sustainable main street. The transportation concept is intended to balance the competing travel demands on Division Street, including traffic, transit, trucks, pedestrians, and bicyclists. In addition, community members would like the street to reflect their desire for a sustainable neighborhood and main street by incorporating green infrastructure into Division's design. The community identified a number of characteristics of the street that interfere with these desires – traffic volumes and speeds, the presence of pro-time (part time) lanes between SE 11th and 28th Place, inadequate opportunities for pedestrian crossings, and the lack of cohesiveness and pedestrian amenities along the street.

3. SCOPE OF WORK

The City of Portland Bureau of Transportation is seeking proposals from individuals, firms, teams or consultants, hereafter called "Proposer(s)," with demonstrated experience in street design, including green street/stormwater management design, traffic engineering, and public involvement. The City proposes to engage the successful Proposer for the following services:

- Develop concept plans and design alternatives for street improvements, especially with respect to green street/stormwater management;
- Facilitating public involvement via a citizen advisory group and open houses;
- Provide for community input and technical analysis; and
- Prepare planning level cost estimates

4. PROJECT FUNDING

The anticipated cost for the services described herein is \$80,000.00. The Proposer's proposal shall include the Proposer's true estimated cost to perform the work irrespective of the City's budgeted funds for this work.

5. TIMELINE FOR SELECTION

The following dates are proposed as a timeline for this project:

Written proposals due at 4:00 p.m.	March 2, 2009
Interviews, if deemed necessary	March 11, 2009
Selection committee recommendation	March 13, 2009
Contract negotiation with successful Proposer	March 17-31, 2009
Notice to proceed – work begins	April 8, 2009

The City reserves the right to make adjustments to the above noted schedule as necessary.

SECTION B

WORK REQUIREMENTS

1. TECHNICAL OR REQUIRED SERVICES

The successful Proposer shall perform the tasks listed below for this project, and shall be expected to work closely with designated City personnel to accomplish these goals:

a. PROJECT MANAGEMENT

The project team will consist of City staff and the successful Proposer(s) team. Proposer shall coordinate with sub-consultants, City Project manager and City staff as needed throughout the duration of the project. Coordination will occur via telephone, written correspondence, email and meetings.

The successful Proposer shall:

Tasks:

1. Prepare work breakdown structure and critical path schedule for project tasks and deliverables.
2. Prepare for and attend project chartering meeting.
3. Attend project team coordination meetings every one to two weeks (up to 25 meetings).
4. Produce monthly invoices.
5. Produce monthly progress reports that reflect the project schedule and show the budgeted cost for each task, tasks completed/percent complete, actual cost/cost to date, earned value, billable hours per person per task, and cost of materials.

b. INTERNAL/TECHNICAL INVOLVEMENT

To ensure there is coordination between agencies and other city bureaus, a Technical Advisory Committee (TAC) will be established. This committee's participants will be responsible for providing technical assistance to the project team.

Tasks:

1. Participate in TAC meetings at identified times in the project process for technical assistance and input (up to 10 meetings).

c. PUBLIC INVOLVEMENT AND OUTREACH

Community involvement in this process will be critical to its success. A Citizen Advisory Committee (CAC) will meet regularly throughout the process and public workshops and open houses will be held at critical points. City staff will provide updates and information to affected neighborhood, community, and business groups as needed.

Tasks:

1. Facilitate public workshops and open houses (4).
2. Facilitate CAC meetings (up to 10, including one walking tour).
3. Produce community display boards for design alternatives, preferred alternative and design details.
4. Produce graphics for project goals, design alternatives, project newsletters (up to 4) and public meeting handouts.

d. **INVENTORY AND DATA COLLECTION**

Information on the existing conditions must be collected and presented in a format that will enable the project team to analyze the information and develop the list of opportunities and constraints. The inventory must include general project information and data required for mapping, and information on existing conditions and policies affecting the project area.

Tasks:

1. Compile general project data from the City and consultants.
2. Compile transportation data (as provided in Existing Conditions Report).
3. Compile Built Environment Data
 - o Building footprints and door openings.
 - o Building façade type and condition.
 - o Tenant information and type of business.
4. Compile Historical Information
5. Community Issues, Needs, and Values
 - o Summarize and synthesize the community's issues, needs, and goals informed by outreach efforts as part of this plan.

e. **DESIGN ALTERNATIVES AND PREFERRED ALTERNATIVE SELECTION**

Develop conceptual design alternatives based on the information derived from the inventory, project goals, design program, and input from the CAC, TAC, and the community. Prepare a summary of the features of each alternative including responsiveness to project goals, and benefits and drawbacks to provide a basis for the evaluation. Prepare planning level cost estimates for each design alternative for comparison to the budget. With CAC, TAC and community input, evaluate and prioritize the alternatives and recommend a preferred alternative. The preferred alternative will include conceptual design and identify the location of proposed improvements.

Tasks:

1. Develop a minimum of two and a maximum of four design alternatives for the project length (SE Division from 11th to 39th).
2. Develop planning level cost estimates for each design alternative.
3. Summarize features, responsiveness to project goals, benefits and drawbacks of each alternative.
4. Lead the CAC, TAC, and the community through an evaluation of the alternatives.
5. Synthesize the evaluation and recommend preferred alternative, including conceptual design and location of improvements.

f. **DESIGN DETAILS AND COST ESTIMATE**

Produce detailed designs of the improvements in the recommended preferred alternative, including the location and general alignment of the improvements, selection of materials and patterns, street furniture and landscaping. If necessary to meet budget projections, consultant will refine designs and location selections with CAC and community during this phase.

Tasks:

1. Develop design details for improvements in the preferred alternative, including location, horizontal alignment, selection of materials and patterns, street furniture, and landscaping details (if applicable).
2. Develop preliminary cost estimate for improvements.
3. Compare cost estimate to budget and refine design, if needed, with CAC and community input.

g. FINAL REPORT AND PLAN ADOPTION

Prepare a final report documenting the decision-making process, the inventory and analysis, project goals, design concepts and alternatives, design details, and cost estimate.

Tasks:

1. Refine any text, maps, graphics, and photographs produced in tasks Part I, Section B. to accommodate final report format.

2. WORK PERFORMED BY THE CITY

The City has assigned a project manager to oversee the successful Proposer's work and provide support as needed. In addition, the Bureau of Transportation has assigned project engineers who will review street design, stormwater design, and provide traffic engineering and modeling (through separate contract with Kittelson and Associates) work throughout the project and provide information about City policies and practices relating to design and operations.

Specific duties the City will perform include:

a. PROJECT MANAGEMENT

1. Overall project management and monitoring
2. Prepare project process diagram
3. Agenda, facilitation, and notes for project chartering meeting
4. Agendas and meeting notes for project team coordination meetings

b. INTERNAL/TECHNICAL INVOLVEMENT

1. Technical Advisory Committee roster.
2. Technical Advisory Committee meeting scheduling, agendas, and summaries

c. PUBLIC INVOLVEMENT AND OUTREACH

1. Citizen Advisory Committee Roster
2. CAC meeting agendas and summaries
3. Project database/mailling list
4. Project newsletters (4) and distribution list
5. Public workshops and open house meeting notices, handouts, and summaries
6. Web page hosting and posting of project information
7. Neighborhood, community and business group presentations
8. Media advisories and distribution lists

d. INVENTORY AND DATA COLLECTION

1. Synthesis of community's issues, needs, and goals
2. Provide consultant with project background, history, and existing conditions information.
3. Synchro/Simtraffic analysis of existing conditions (via separate contract with Kittelson and Associates)

e. DESIGN ALTERNATIVES AND PREFERRED ALTERNATIVE SELECTION

1. Summary of the CAC, TAC, and community evaluations of the alternatives
2. Geometric and operational analysis of the design

3. Synchro/Simtraffic models of preferred alternative(via separate contract with Kittleson and Associates)

f. **DESIGN DETAILS AND COST ESTIMATE**

1. Provide cost estimating methodology

g. **FINAL REPORT AND PLAN ADOPTION**

1. Summarize process, products, project and design concepts.
2. Publish report, in both hard copy and digital format.

The City will provide the successful Proposer with:

1. All deliverables described in Part I, Section B.2 (Work Performed by the City)
2. Building footprint, curb line, property line/tax lot, sidewalk widths and planting strip width and locations will be provided by ESRI shape file or DXF file format as well as aerial photos of the project area.

Other tasks the City will perform include the following:

- Managing and staffing the CAC, TAC, and public workshops
- Preparing meeting notices, agendas, summaries for CAC, TAC, and public workshop
- Managing logistics for CAC, TAC, and public workshops, including all meeting room arrangements
- Reviewing all work produced by the successful Proposer, including review for quality and conformance with city policies and accepted professional practices.

3. DELIVERABLES AND SCHEDULE

Deliverables shall be considered those tangible resulting work products that are to be delivered to the City such as reports, draft documents, data, interim findings, drawings, schematics, training, meeting presentations, final drawings and reports. The successful Proposer is encouraged to provide any deliverables in accordance with the City's Sustainable Paper Use Policy. The policy can be viewed at: <http://www.portlandonline.com/omf/index.cfm?c=37732>.

Deliverables and schedule for this project shall include:

a. **PROJECT MANAGEMENT**

Deliverables:

- Produce monthly progress reports

Schedule:

- Ongoing throughout project duration

b. **INTERNAL/TECHNICAL INVOLVEMENT**

Deliverables:

- Participate/present technical information at up to 10 TAC meetings

Schedule:

- Ongoing throughout project duration
- TAC meetings will occur monthly

c. **PUBLIC INVOLVEMENT AND OUTREACH**

Deliverables:

- CAC meetings – preparation, facilitation, and participation (up to 10 meetings)
- Public Workshops – preparation and participation (4 meetings)
- Graphics displays and presentations representing work to date for CAC meetings

and public workshops, and for project newsletters

Schedule:

- Ongoing throughout project duration
- CAC meetings will occur monthly
- Public workshops and/or newsletters will occur during the following tasks: Design Alternatives, Design Details and Cost Estimate, and Final Report and Plan Adoption

d. **DESIGN ALTERNATIVES AND PREFERRED ALTERNATIVE SELECTION**

Deliverables:

- Summary of the design alternatives for the project area in graphic and text form, including primary features, responsiveness to project goals, benefits and drawbacks of each alternative, and planning level cost estimates.
- Evaluations of the alternatives
- Preferred alternative, including conceptual design and location of improvements, graphic and text form.

Schedule:

- Design Alternatives, planning level cost estimates: 150 days from NTP
- Preferred alternative: 180 days from NTP

All deliverables and resulting work products from this contract will become the property of the City of Portland.

e. **DESIGN DETAILS AND COST ESTIMATE**

Deliverables:

- Design details for preferred alternative
- 1"=20' drawings of any locations in the preferred alternative
- Preliminary cost estimate

Schedule:

- Draft of all deliverables listed above: 210 days from NTP
- Final version of all deliverables listed above: within 10 days of receipt of comments from City
- Cost estimate and design refinements (if necessary): 240 days from NTP

f. **FINAL REPORT AND PLAN ADOPTION**

Deliverables:

- Text, maps, graphics, and photographs produced in previous tasks to accommodate final report format.

Schedule:

- 270 days from NTP

All deliverables and resulting work products from this contract will become the property of the City of Portland.

4. PLACE OF PERFORMANCE

Contract performance will take place primarily at the Proposer's facility. On occasion and as appropriate, work will be performed at City facilities, a third-party location or any combination thereof.

5. PERIOD OF PERFORMANCE

The City anticipates having the successful Proposer begin work immediately upon contract execution with submittal of final deliverables to the City occurring by **December 15, 2009**.

6. PUBLIC SAFETY

Public safety may require limiting access to public work sites, public facilities, and public offices, sometimes without advance notice. The Proposer shall anticipate delays in such places and include the cost of delay in the proposed cost. The successful Proposer's employees and agents shall carry sufficient identification to show by whom they are employed and display it upon request to security personnel. City project managers have discretion to require the successful Proposer's employees and agents to be escorted to

and from any public office, facility or work site if national or local security appears to require it.

7. INSURANCE

The successful Proposer(s) shall agree to maintain continuous, uninterrupted coverage of all insurance as required by the City. There shall be no cancellation, material change, reduction of limits or intent not to renew the insurance coverage(s) without a 30-day written notice from the successful Proposer or its insurer(s) to the City.

Workers' Compensation Insurance in compliance with ORS 656.017, which requires subject employers to provide Oregon workers' compensation coverage for all their subject workers (firms with one or more employees, unless exempt under ORS 656.027).

General Liability Insurance with a combined single limit of not less than \$1,000,000 per occurrence for Bodily Injury and Property Damage. It shall include contractual liability coverage for the indemnity provided under this contract, and shall provide that the City of Portland, and its agents, officers, and employees are Additional Insureds but only with respect to the successful Proposer's services to be provided under this Contract.

Automobile Liability Insurance with a combined single limit of not less than \$1,000,000 per occurrence for Bodily Injury and Property Damage, including coverage for owned, hired, or non-owned vehicles, as applicable.

Professional Liability Insurance with a combined single limit of not less than \$1,000,000 per claim, incident, or occurrence. This is to cover damages caused by negligent acts, errors or omissions related to the professional services to be provided under this contract. If insurance coverage is provided on a "claims made" basis, the successful Proposer shall acquire a "tail" coverage or continue the same coverage for three years after completion of the contract, provided coverage is available and economically feasible. If such coverage is not available or economically feasible, contractor shall notify City immediately.

Certificates of Insurance: As evidence of the insurance coverages, the successful Proposer shall furnish acceptable insurance certificates to the City at the time signed contracts are returned to the City. The certificate will specify all of the parties who are Additional Insureds and will include the 30-day cancellation clause as identified above. Insuring companies or entities are subject to City acceptance. If requested, complete policy copies shall be provided to the City. The successful Proposer shall be financially responsible for all pertinent deductibles, self-insured retentions, and/or self-insurance.

SECTION C

1. INDEX

2. SAMPLE CONTRACT

ATTACHMENTS

Exhibit A [Division Green Street / Main Street Plan \(February 2006\)](#)

The Professional, Technical and Expert Services Contract is the City's standard contract and will be used as a result of this selection process. A sample contract can be viewed at: <http://www.portlandonline.com/shared/cfm/image.cfm?id=27067> .

PART II

PROPOSAL PREPARATION AND SUBMITTAL

SECTION A

PRE-SUBMITTAL MEETING/CLARIFICATION

1. PRE-SUBMITTAL MEETING
2. RFP CLARIFICATION

There will be no pre-submittal meeting or site visit scheduled for this project.

Questions and requests for clarification regarding this Request for Proposal must be directed in writing, via email or fax, to the person listed below. **The deadline for submitting such questions/clarifications is Thursday, February 19, 2009.** An addendum will be issued no later than 72 hours prior to the proposal due date to all recorded holders of the RFP if a substantive clarification is in order.

Pat Boyd
Bureau of Transportation
1120 SW 5th Avenue
Portland, Oregon 97204

E-mail: Patrick.boyd@trans.ci.portland.or.us
Phone: (503) 823-7031
Fax: (503) 823-3453

SECTION B

PROPOSAL SUBMISSION

1. PROPOSALS DUE

Sealed proposals must be received no later than the date and time, and at the location, specified on the cover of this solicitation. The outside of the envelope shall plainly identify the subject of the proposal, the RFP number and the name and address of the Proposer. It is the Proposer's responsibility to ensure that proposals are received prior to the specified closing date and time, and at the location specified. Proposals received after the specified closing date and/or time shall not be considered and will be returned to the Proposer unopened. The City shall not be responsible for the proper identification and handling of any proposals submitted to an incorrect location.

2. PROPOSAL

Proposals must be clear, succinct and not exceed **12** pages. Section dividers, title page, and table of contents do not count in the overall page count of the proposal. Proposers who submit more than the pages indicated may not have the additional pages of the proposal read or considered.

For purposes of review and in the interest of the City's Sustainable Paper Use Policy and sustainable business practices in general, the City encourages the use of submittal materials (i.e. paper, dividers, binders, brochures, etc.) that contain post-consumer recycled content and are readily recyclable. The City discourages the use of materials that cannot be readily recycled such as PVC (vinyl) binders, spiral bindings, and plastic or glossy covers or dividers. Alternative bindings such as reusable/recyclable binding posts, reusable binder clips or binder rings, and recyclable cardboard/paperboard binders are examples of preferable submittal materials. Proposers are encouraged to print/copy on both sides of a single sheet of paper wherever applicable; if sheets are printed on both sides, it is considered to be two pages. Color is acceptable, but content should not be lost by black-and-white printing or copying.

All submittals will be evaluated on the completeness and quality of the content. Only those Proposers providing complete information as required will be considered for evaluation. The ability to follow these instructions demonstrates attention to detail.

3. ORGANIZATION OF

Proposers must provide all information as requested in this Request for Proposal (RFP).

PROPOSAL

Responses must follow the format outlined in this RFP. Additional materials in other formats, or pages beyond the stated page limit(s) may not be considered. The City may reject as non-responsive at its sole discretion any proposal or any part thereof, which is incomplete, inadequate in its response, or departs in any substantive way from the required format. Proposal responses shall be organized in the following manner:

1. Cover Letter
2. Project Team
3. Proposer's Capabilities
4. Project Approach and Understanding
5. Diversity in Employment and Contracting Requirements
6. Proposed Cost
7. Supporting Information

SECTION C

EVALUATION CRITERIA

1. COVER LETTER

By submitting a response, the Proposer is accepting the General Instructions and Conditions of this Request for Proposal (reference second page of the RFP) and the Standard Contract Provisions of the Professional, Technical and Expert Services contract. The Cover Letter must include the following:

- RFP number and project title
- name(s) of the person(s) authorized to represent the Proposer in any negotiations
- name(s) of the person(s) authorized to sign any contract that may result
- contact person's name, mailing or street addresses, phone and fax numbers and email addresses

A legal representative of the Proposer, authorized to bind the Proposer in contractual matters must sign the Cover Letter.

BUSINESS COMPLIANCE

The Proposer must be in compliance with the laws regarding conducting business in the City of Portland before an award may be made. The Proposer shall be responsible for the following:

Certification as an EEO Affirmative Action Employer

All Proposers must be certified as Equal Employment Opportunity Employers as prescribed by Chapter 3.100 of the Code of the City of Portland. Failure to receive EEO certification prior to the date and time of bid opening may result in delaying the award of the contract. Details of certification requirements are available from the Bureau of Purchases, 1120 SW Fifth Avenue, Room 750, Portland, Oregon 97204, (503) 823-6855, website: <http://www.portlandonline.com/omf/purchasing>

Non-Discrimination in Employee Benefits (Equal Benefits)

Proposers are encouraged to submit the Equal Benefits Compliance Worksheet/Declaration Form with their response. If not submitted, you will be contacted and required to provide this form prior to contract award; otherwise your proposal may be rejected. If your company does not comply with Equal Benefits and does not intend to do so, you must still submit the Form. The Equal Benefits Compliance Worksheet/Declaration Form can be obtained from the following web site: <http://www.portlandonline.com/omf/purchasing>

Fill out the form properly. You may call the Bureau of Purchases at 503-823-6855 to ensure you correctly complete the form. You may also call the contact listed on the front page of this solicitation document for assistance.

There are five options on the Worksheet/Declaration Form to pick among. They range from full compliance (Options A, B, C), to one that requires

advance authorization by the City (Option D – Delayed Compliance), to Non Compliance. Select the option that is true of your company's standing at the time you submit your proposal. You cannot change your answer after you submit the Worksheet/Declaration Form.

Option D is only used if you have an official waiver from the City. Waivers are only issued by the Bureau of Purchases.

The Form provides the City your declared Equal Benefit status. However, the City issues the final determination of your Equal Benefit status for purposes of contract award.

If information on your form is conflicting or not clearly supported by the documentation that the City receives, the City may seek clarification to ensure we properly classify your compliance.

Business License

All Proposers must be in compliance with the City of Portland Business License requirements as prescribed by Chapter 7.02 of the Code of the City of Portland. Details of compliance requirements are available from the Revenue Bureau License and Tax Division, 111 SW Columbia Street, Suite 600, Portland, Oregon 97201, (503) 823-5157, website: <http://www.portlandonline.com/omf/index.cfm?c=29320>

If your firm currently has a business license and is EEO certified, include in the Cover Letter your firm's City of Portland Business License number as well as the Equal Employment Opportunity (EEO) expiration date.

2. PROJECT TEAM

This criterion relates to the project principal, project manager, key staff and subconsultants. The basic question concerns how well the key staff's qualifications and experience relate to the services requested. The response should address the following:

- Approximate number of people to be assigned to the project.
- Extent of company's principal member's involvement
- Team qualifications and experience on similar or related projects:
 - o Qualifications and relevant experience of prime consultant
 - o Qualifications and relevant experience of sub-consultants, if any
 - o Project manager's experience with similar projects
- Names of key members who will be performing the work on this project, and:
 - o Their responsibilities on this project
 - o Current assignments and location
 - o Experience on similar or related projects
 - o Unique qualifications
 - o Percentage of their time that will be devoted to the project

3. PROPOSER'S CAPABILITIES

This criterion relates to the firm's capabilities and resources in relation to this work. This section might include organizational charts, a comment regarding lines of authority and responsibility, a statement regarding how the Proposer's firm is prepared to respond promptly to problems, program changes, or other information that would be necessary in order to evaluate the Proposer's response. This section should:

- Describe similar projects performed within the last 5 years, which best characterize firm's capabilities, work quality and cost control.
- Describe similar projects with other government agencies.
- Describe firm's resources available to perform the work for the duration of the project and other on-going projects.
- Describe firm's internal procedures and/or policies associated or related to work quality and cost control.

- Describe firm's management and organizational capabilities.

4. PROJECT APPROACH AND UNDERSTANDING

This criterion relates to the Proposer's understanding and approach to the project. The Proposers should provide clear and concise understanding of the project by describing and clarifying any major issues based upon project information provided in this RFP, including attachment materials identified in Part I, Section C. For each phase of work, the project approach should:

- Describe the proposed work tasks and activities, the methodology that will be used to accomplish them, and identify the team members who will work on each task.
- Describe the proposed work products that will result from each task or activity.
- Identify points of input and review with City staff.
- Identify the time frame estimated to complete each task.

5. DIVERSITY IN EMPLOYMENT AND CONTRACTING REQUIREMENTS

The City is committed to increasing contracting opportunities for State of Oregon certified minority, women and emerging small business (M/W/ESB) enterprises. The City values, supports and nurtures diversity, and encourages any firm contracting with the City to do the same, maximizing M/W/ESB business participation with regard to all City contracts. As such, the City has established an overall 20% utilization goal in awarding PTE contracts to State of Oregon certified emerging small business (ESB) enterprises and has assigned at least 15% of the total points available on this solicitation to determine the award of this contract. No goal is set for the use of minority (MBE) and women business (WBE) enterprises, but the City is committed to ensuring that such firms receive opportunities and equal consideration to be awarded City PTE contracts.

All Proposers shall address the following in their proposals:

- Indicate if your firm is currently certified in the State of Oregon as an MBE, WBE and/or ESB, or if your firm has applied for certification with the State of Oregon's Office of Minority, Women and Emerging Small Business (OMWESB).
- Identify your current diversity of workforce and describe your firm's commitments to providing equal employment opportunities. Include in your response:
 - Number of total employees and description of type of work performed.
 - Number of minorities and women within your current workforce, broken out by ethnicity and positions held.
 - Any underutilization of minorities or women within your workforce and your firm's efforts to remedy such underutilization.
 - Any plans to provide innovative mentoring, technical training or professional development opportunities to minorities and women in your workforce in relation to this project, or plans to employ minorities and women to work on this project.
 - Description of the process your firm uses to recruit minorities and women.
- Have you subcontracted or partnered with State of Oregon certified M/W/ESB firms on any project within the last 12 months? If so, please describe the history of the firm's subcontracting and partnering with certified M/W/ESB firms. Include in your response:
 - List of State of Oregon certified M/W/ESB firms with which your firm has had a contractual relationship during the last 12 months.
 - Any innovative or successful measures that your firm has undertaken to work with M/W/ESB firms on previous projects.
 - Any mentoring, technical or other business development services your firm has provided to previous or current M/W/ESB subconsultants or partners, or will provide in relation to this project.
- Are you subcontracting any element of your proposal? Describe your firm's plan for obtaining maximum utilization of certified M/W/ESB firms on this project. Include in your response:

- Subcontracting opportunities your firm has identified in the scope of this project.
- Efforts made relating to outreach and recruitment of certified M/W/ESB firms. Did your firm advertise contracting opportunities in the *Daily Journal of Commerce*, *Skanner*, *Oregonian*, *Observer*, *El Hispanic News*, *Asian Reporter*, and/or other trade publications? Did your firm conduct any outreach meetings? Did your firm use the State's OMWESB certification list, or other source, as a basis for direct outreach? What were the actual results of any of the above efforts?
- Any proposals received from certified M/W/ESB firms. If any such proposals were rejected, provide reasons for rejection.
- Other efforts your firm used or proposes to use in relation to this project.

e. If your firm will be utilizing certified M/W/ESB firms on this project, please list those firms and detail their role within your proposal.

The City expects thoughtful consideration of all of the above Diversity in Employment and Contracting criteria in the preparation of proposals, and will enforce all diversity in workforce and M/W/ESB commitments submitted by the successful Proposer.

6. PROPOSED COST

The proposal shall include the Proposer's true estimated cost or fixed-price estimate for the proposed project approach irrespective of the City's anticipated cost. Additionally, this cost shall include the hourly rates of each person associated with the project as well as the estimated number of hours each staff member will be expected to work on each task.

7. SUPPORTING INFORMATION

Supporting material must include a minimum of **3 (three) references**, and may include other information pertinent to the project or work to be performed. References must include the contact person's name, agency, address, phone number, their role in the project (e.g., project manager, etc.), name of the project and when the work was done.

PART III

PROPOSAL EVALUATION

SECTION A

PROPOSAL REVIEW AND SELECTION

1. EVALUATION CRITERIA SCORING

Each proposal shall be evaluated on the following evaluation criteria, weighting and maximum points, as follows:

Criteria		Maximum Score
a.	Cover Letter	0
b.	Project Team	20
c.	Proposer's Capabilities	20
d.	Project Approach and Understanding	25
e.	Diversity in Employment and Contracting	15
f.	Proposed Cost	15
g.	Supporting Information	5
Total Points Available		100

2. PROPOSAL REVIEW

An evaluation review committee will be appointed to evaluate the proposals received. For the purpose of scoring proposals each of the committee members will evaluate each proposal in accordance with the criteria and point factors listed above. The evaluation committee may seek outside expertise, including but not limited to input from technical advisors, to assist in evaluating proposals.

The successful Proposer shall be selected by the following process:

- a. An evaluation committee will be appointed to evaluate submitted written proposals.
- b. The committee will score the written proposals based on the information submitted according to the evaluation criteria and point factors.
- c. The committee will require a minimum of **7 (seven)** working days to evaluate and score the written proposals.
- d. A short list of Proposers, based on the highest scores, may be selected for oral interviews if deemed necessary. The City reserves the right to increase or decrease the number of Proposers on the short list depending on the scoring and whether the Proposers have a reasonable chance of being awarded a contract.
- e. If oral interviews are determined to be necessary, the scores from the written proposals will be considered preliminary. Final scores, based on the same evaluation criteria, will be determined following the interviews.

All communications shall be through the contact(s) referenced in Part II, Section A.2 of the RFP. At the City's sole discretion, communications with members of the evaluation committee, other City staff or elected City officials for the purpose of unfairly influencing the outcome of this RFP may be cause for the Proposer's proposal to be rejected and disqualified from further consideration.

For contracts over \$100,000, the evaluation committee's recommendation for contract award will be submitted to the Portland City Council for approval. The City has the right to reject any or all proposals for good cause, in the public interest.

NOTE: In the City's discretion, litigation between the City and a Proposer shall be cause for proposal rejection, regardless of when that litigation comes to the City's attention and regardless how the Proposer's proposal may have been scored. Proposals may also be rejected if they use subcontractors or subconsultants who are involved in litigation with the City. Proposers concerned about possible

rejection on this basis should contact the City before submission of a proposal for a preliminary determination of whether its proposal will be rejected.

**3. CLARIFYING PROPOSAL
DURING EVALUATION**

During the evaluation process, the City has the right to require any clarification or change its needs in order to understand the Proposer's view and approach to the project and scope of the work.

CONTRACT AWARD

SECTION B

**1. CONSULTANT
SELECTION**

The City will negotiate and, if successful, award a contract to the highest scoring Proposer. Should the City not reach a favorable agreement with the highest scoring Proposer, at the City's sole discretion, the City shall terminate negotiations and commence negotiations with the second highest scoring Proposer and so on until a favorable agreement is reached. A consultant selection process will be carried out under Portland City Code Chapter 5.68.

**2. CONTRACT
DEVELOPMENT**

The proposal and all responses provided by the successful Proposer may become a part of the final contract. The form of contract shall be the City's Contract for PTE Services.

**3. AWARD REVIEW AND
PROTESTS**

REVIEW:

Following the Notice of Intent to Award, the public may view proposal documents. However, any proprietary information so designated by the Proposer as a trade secret and meeting the requirements of ORS 192.501(2) will not be disclosed unless the Multnomah County District Attorney determines that disclosure is required. At this time, Proposers not awarded the contract may seek additional clarification or debriefing, request time to review the selection procedures or discuss the scoring methods utilized by the evaluation committee.

PROTESTS OF CONTRACT AWARDS:

Protests may be submitted to the Purchasing Agent only for contracts in excess of the formal limit established by the City Auditor (reference <http://www.portlandonline.com/omf/index.cfm?a=74585&c=27353>), and only from those Proposers who would receive the contract if their protest were successful.

Protests must be received by the Purchasing Agent within seven (7) calendar days UNLESS OTHERWISE NOTED following the date of the City's Notice of Intent to Award was issued. The protest must specifically state the reason for the protest and show how its proposal or the winning proposal was mis-scored or show how the selection process deviated from that described in the solicitation document. The contract award process will be put on hold until the protest has been resolved.

Timely protests must include all legal and factual information regarding the protest, and a statement of the form of relief requested. Protests received later than specified or from other than the Proposer who would receive the contract if the protest was successful will not be considered. The exercise of judgment used by the evaluators in scoring the written proposals and interviews, including the use of outside expertise, is not grounds for appeal.

The Purchasing Agent may waive any procedural irregularities that had no material affect on the selection of the proposed contractor, invalidate the proposed award, amend the award decision, request the evaluation committee re-evaluate any proposal or require the bureau to cancel the solicitation and begin again to solicit new proposals. In the event the matter is returned to the evaluation committee, the Purchasing Agent shall issue a notice canceling the Notice of Intent to Award.

Decisions of the Purchasing Agent are final and conclude the administrative appeals process.