



**PO Box 3529
Portland, OR 97208**

REQUEST FOR PROPOSALS

ORGANIZATION EFFECTIVENESS CONSULTING SERVICES AS REQUIRED

SOLICITATION NUMBER 2008-0026

April 7, 2008

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1. OVERVIEW

1.1 Introduction

The Port of Portland (Port) is soliciting proposals from experienced firms and individuals to provide organization effectiveness consulting services as required for projects currently in progress and yet to come. Proposals for two distinct scopes of services are sought:

Scope A (Section 1.3.1): Executive Development and Executive Coaching

Scope B (Section 1.3.2): Organization Assessment and Intervention Services

Interested parties may submit proposals for one or both of the scopes; however, a separate proposal must be submitted for each scope. The Port reserves the right to issue multiple contracts for these services. The selected firms will work in combination with the Port of Portland internal organization development department. Contracts will be for an initial term of two years, with an option to renew for two additional one year terms.

1.2 Background

The Port of Portland plays a vital role in stimulating and sustaining a strong regional business climate. All of the Port's employees are an integral part of its mission to enhance the region's economy and quality of life by providing efficient cargo and air passenger access to national and global markets.

Employment at the Port ranges from entry-level clerical and customer service jobs to technical, professional and management-level positions. Engineers, property managers, environmental managers and technicians, information technology specialists, community relations experts, and fire and safety personnel often join together to work on complex projects. Worksites include the Port's downtown administrative office building; Portland International Airport and its three smaller regional airports, located in Hillsboro, and Troutdale; and marine terminals located on both the Columbia River and Willamette River.

1.3 Scopes of Services

1.3.1 Scope A - Executive Development and Executive Coaching

The Port is seeking a consulting firm or individual consultant to design an executive development program in cooperation with the Port's internal organization development team. The selected consulting firm or individual consultant will then develop and implement the co-authored program. The executive development program will be exclusively for the seven person executive team. This program should contain a multi-rater assessment tool/process, a behavioral or personality assessment tool (preferably the Birkman) and a process by which to deliver assessment results to the executive team as a whole and deliver coaching to each director individually. Additional coaching and development work will be determined on a case-by-case basis.

1.3.1.1 Minimum Requirements

Executive Development and Executive Coaching

1. Firms must have a pool of several coaches to draw upon to meet the needs of the organization.
2. Firms must have coaches that have both significant business and coaching backgrounds. The Port requires coaches to have at least 10 years of business experience (as a non-coaching related senior manager or executive) and at least 5 years of executive coaching experience.
3. Firms must have access to a user-friendly, on-line multi-rater assessment tool.
4. Firms must be certified in a recognized behavioral or psychometric assessment tool that can be used in both team and individual coaching processes.
5. Firms must have a track record of effective coaching and have a robust but accessible coaching process/philosophy.

1.3.2 Scope B - Organization Assessment and Intervention Services

The Port's internal organization development team manages organization effectiveness assessments and team development. However, on occasion there are insufficient resources to manage the workload. The Port is seeking firms and individuals that have extensive experience in consulting, interpersonal and team dynamics, conflict management and organization development. The selected firm(s) or individual(s) will provide targeted organizational effectiveness assessments, recommendations and/or interventions to Port management on an as-needed basis.

1.3.2.1 Minimum Requirements

Organization Assessment and Intervention Services

1. Firms must have at least 10 years experience in organization assessment and organization effectiveness processes.
2. Firms must have experience working with executives, management, individual contributors and represented employees.
3. Firms must be familiar with standard consulting practices, conflict management, mediation, team and interpersonal dynamics.

2. PROPOSAL PROCESS

2.1 General

2.1.1 Evaluation Proposals will be evaluated by a Port evaluation team. The evaluation will be in accordance with Section 3.2.2 Evaluation Criteria, and may include requests by the team for additional information, oral discussions, site visits, and inquiries into the experience and responsibility of the proposer. The team will report its findings to the Port's Manager of Contracts and Procurement.

2.1.2 Obligation to Award The issuance of this RFP, and the receipt and evaluation of proposals does not obligate the Port to award a contract. The Port will not pay any costs incurred in responding to this RFP. The Port may cancel this RFP or reject any or all proposals in accordance with ORS 279B.100

2.1.3 Commencement of Work The successful proposer(s) may not commence work until receipt of a fully executed contract.

2.1.4 Questions All questions pertaining to this RFP must be directed to the Port's Contracts and Procurement Department, attention Margaret Marriott. Ms. Marriott may be contacted via phone at 503.944.7585 or e-mail at margaret.marriott@portofportland.com. Questions received fewer than five (5) days prior to the deadline for receipt of proposals may not be considered.

2.2 Pre-proposal Interpretation of Contract Documents

2.2.1 Changes to RFP

2.2.1.1 The Port reserves the right to make changes to the RFP. Changes will be made by written addendum which will be issued to all prospective proposers on the Port's list of RFP holders.

2.2.1.2 Prospective proposers may request or suggest any change to the RFP by submitting a written request. The request shall specify the provision of the RFP in question, and contain an explanation for the requested change. The request must be submitted at least five (5) calendar days prior to the date set for receipt of proposals.

2.2.1.3 The evaluation team will evaluate all requests submitted, but reserves the right to determine whether to accept the requested change.

2.2.2 Amend or Withdraw Proposal A proposer may amend or withdraw its proposal any time prior to the time and date established for submission of proposals.

2.3 Public Disclosure of Proposals

2.3.1.1 Any information provided to the Port pursuant to this RFP is subject to public disclosure pursuant to Oregon's public records laws (ORS 192.410 to 192.505).

2.3.1.2 The general requirement for public disclosure is subject to a number of exemptions. Each page containing information deemed by the proposer to remain exempt from public disclosure after proposals have been evaluated (e.g., pages containing trade secret, economic development information, etc.) should be plainly marked. A general statement that all or certain parts of the proposal are exempt from public disclosure will not be effective unless each page on which those parts appear has been marked in accordance with this section.

2.3.1.3 The fact that a proposer marks certain information as exempt from disclosure does not mean that the information is necessarily exempt. The Port will make an independent determination regarding exemptions applicable to information that has been properly marked. Information that has not been properly marked may be disclosed in response to a public records request. When exempt information is mixed with nonexempt information, the nonexempt information must be disclosed. The Port will redact pages that include both exempt and nonexempt information to allow disclosure of the nonexempt information.

2.3.1.4 Unless expressly provided otherwise in this RFP or in a separate communication, the Port does not agree to withhold from public disclosure any information submitted in confidence by a proposer unless the information is otherwise exempt under Oregon law. The Port considers proposals submitted in response to this RFP to be submitted in confidence only until the Port's evaluation is complete, and agrees not to disclose proposals until the Port has completed its evaluation of all proposals and publicly announced the results.

2.4 Submission of Proposals

2.4.1 Requirements Each proposer's submission(s) in response to this RFP must:

2.4.1.1 Include **one original** (marked as such) and **4 copies** of each proposal.

2.4.1.2 Be submitted in a sealed envelope that is plainly marked "Proposal to Provide Executive Development and Executive Coaching" and/or "Proposal to Provide Organization Assessment and Intervention Services" and that bears the proposer's name and address; and

2.4.1.3 Be received by the Port's Contracts and Procurement Manager, Craig Johnsen, at 121 NW Everett Street, 5th Floor, Portland, OR 97209 (Mailing address: PO Box 3529, Portland, OR 97208) by 3:00 p.m. on Monday, April 28th, 2008. The Port, at its option, may decline to consider late submissions.

2.5 RFP Schedule

2.5.1 Deadlines

2.5.1.1 The following schedule is tentative and is subject to change at the sole discretion of the Port:

- 4/07/2008 Issuance of RFP
- 4/28/2008 3 p.m. for receipt of proposals
- 5/19 – 20/2008 Interviews (if required)
- 5/23/2008 Selection of apparent successful proposers announced
- 6/15/2008 Contracts begin

2.5.2 Period of Irrevocability Proposals will be offers that are irrevocable for a period of sixty (60) days after the time and date proposals are due. Proposals will contain the name, address, telephone number and email address of an individual or individuals with authority to bind the company during the period in which the proposal will be evaluated.

2.6 Protests

2.6.1 Objections or Protests A proposer or prospective proposer who wishes to object to or protest any aspect of this procurement must deliver a written protest to the Manager of Contracts and

Procurement, 121 NW Everett Street, 5th Floor, Portland, OR 97209; mailing address, PO Box 3529, Portland, OR 97208; or Facsimile (503) 548-5812.

2.6.2 Timeliness

2.6.2.1 If the protest relates to matters that are apparent on the face of the solicitation documents or that are otherwise known or should have been known to the protester, the protest must be delivered no later than five (5) business days prior the deadline for the Port's receipt of offers.

2.6.2.2 If the protest relates to other matters, including but not limited to the award of the contract, it must be delivered as soon as possible, and in no event later than five (5) business days, after the protester knows or reasonably should have known of the award of the contract, the Port's intent to award the contract, or other matters to which the protest is addressed.

2.6.3 Delivery A protest is delivered, for the purposes of this paragraph, when it is actually received by the Port's Contracts and Procurement Department staff.

2.6.4 Late Protests

2.6.4.1 The Port may decline to review a late protest.

2.6.4.2 A protest shall be deemed to include only the documents timely delivered pursuant to this paragraph. It must clearly state all of the grounds for the protest and must include all arguments and evidence in support of the protest. Testimonial evidence may be submitted by affidavit. The Port may investigate as it deems appropriate in reviewing the protest, and will issue a written response to the protest. The Port may proceed with contract award, execution, and performance while a protest is pending.

3. PROPOSAL CONTENT AND EVALUATION CRITERIA

3.1 Preparation

3.1.1 Proposals should be prepared simply and economically, providing a straightforward, concise description of the proposer's ability to satisfy the requirements of this RFP. Submissions of technical literature, display charts, or other supplemental materials are the responsibility and within the discretion of the proposer. The Port will not be liable for any expense incurred in the preparation of proposals. Firms interested in being considered for this work must submit the following written information for review by the evaluation team.

3.1.2 Proposers are encouraged to provide complete information in their written proposals. However, except as provided otherwise below, each proposal in response to section 3.2.2 Part II A and section 3.2.3 Part II B shall be in a font size no smaller than 10 points and **shall not exceed 15 pages**, including pictures or diagrams. Each side of a sheet of paper is considered one page. Double-sided printing is encouraged. Pages should be numbered consecutively and fastened in the upper left-hand corner only. There should be no other bindings, such as comb-binders, presentation folders, 3-ring binders, etc. **If a proposer exceeds the page limit in responding to section 3.2.2 or section 3.2.3, the Port will consider the information on the first 15 pages, and may decline to consider information beyond the page limitation.**

3.2 Format Proposals shall conform to the following format:

3.2.1 Part I - Proposal Form The proposal form follows this section of the RFP. Proposers must complete the Proposal Form (Exhibit A) and include it as the first page of each proposal. This form does not count toward the page limitation.

3.2.2 Part II A - Required Submissions and Evaluation Criteria **Executive Development and Executive Coaching**

Proposals will be evaluated by the Port's evaluation team based upon the criteria shown below. If no criteria weighting is shown, then the criteria are listed in their relative order of importance. Although some of the criteria may be given more weight than others, each proposer is expected to provide the Port with a comprehensive proposal which allows the Port to do a complete evaluation against the criteria.

3.2.2.1 Qualifications of Proposer

Provide a brief executive summary including the following information:

- (a) Organization financial health and years in business providing Executive Coaching Services
- (b) Business status e.g. private or public owned firm
- (c) Availability of Portland-area firm management personnel

3.2.2.2 Project Team

- (a) Provide resumes of proposed staff containing business and coaching experience (Include as an Appendix. Not included in 15-page limit.)
- (b) Provide psychometric assessment certifications and examples of utilization

3.2.2.3 Project Approach

- (a) Provide a comprehensive proposal for working through the executive development project

- (b) Describe your coaching process and provide examples of coaching effectiveness for at least two recent clients of similar size and structure
- (c) Provide guest access to the firm's online multi-rater survey tool

3.2.2.4 Fees

- (a) Describe coaching services including assessments, telephone contacts and any other service element. List all fees and costs associated with these services, as well as listing hourly rates for all staff, including position titles. Please also describe costs for the overall executive development project described in the scope of work. Itemize costs wherever possible

3.2.2.5 Emerging Small Business Participation

- (a) The Port is committed to increasing Emerging Small Business participation in Port business opportunities. Emerging Small Business (ESB) means, for the purposes of this solicitation and resulting contract(s), a for-profit small business enterprise that has been certified by the Oregon State Office of Minority, Women and Emerging Small Business (OMWESB, www.oregon.gov/DCBS/OMWESB/index.shtml) as an Emerging Small Business enterprise. ESBs may also be certified as disadvantaged, minority-owned, or women-owned businesses. However, for the purposes of this participation program, a business certified as a disadvantaged, minority-owned, or woman-owned business that is not *also* certified as an ESB will not be counted in determination of ESB participation.

- (b) Each fiscal year the Port establishes an annual ESB participation target which is different from the Federal disadvantaged business goal. If this project is to be funded in part or whole by Federal funds, there will be a separate section in this RFP explaining the Federal requirements. Even if there are no Federal requirements for this project, the Port strongly encourages all proposers to consider how they can help the Port achieve its ESB participation target. The proposal shall address the following:

- (i) Is the proposer an ESB certified by the OMWESB?
- (ii) Provide a narrative description of the proposer's experience in promoting ESB participation as partners, subcontractors, or suppliers on previous projects. Describe any innovative or successful measures that the proposer has undertaken to increase ESB participation on projects. Include a list of ESBs with which the proposer's firm has had a contractual relationship during the last 12 months.
- (iii) Describe portions of the work the proposer may be able to subcontract, and identify work items that could be performed by ESBs.
- (iv) Describe the actions and strategies the proposer will take to increase ESB participation in this work. Include names of ESBs that will be part of the team for this project.

3.2.2.6 References

- (a) Provide names and current contact information of at least two references who have direct knowledge of the firm's ability to execute required services
- (b) Provide names and current contact information of at least two references for individual coaches

3.2.3 Part II B - Required Submissions and Evaluation Criteria for Organization Assessment and Intervention/Consulting Services

Proposals will be evaluated by the Port's evaluation team based upon the criteria shown below. If no criteria weighting is shown, then the criteria are listed in their relative order of importance. Although some of the criteria may be given more weight than others, each proposer is expected to provide the Port with a comprehensive proposal which allows the Port to do a complete evaluation against the criteria.

3.2.3.1 Qualifications of Proposer

Provide a brief executive summary including the following information:

- (a)** Organization financial health and years in business providing Organizational Assessment and Intervention/Consulting Services
- (b)** Business status e.g. private or public owned firm
- (c)** Availability of Portland area firm management personnel

3.2.3.2 Project Team

- (a)** Provide resumes containing consulting experience and any pertinent education or certifications in mediation, conflict management or other related organization development area (Include as an Appendix. Not included in 15-page limit.)

3.2.3.3 Project Approach

- (a)** Description of organization assessment and consulting processes
- (b)** Provide examples of recent intervention, assessment and outcome

3.2.3.4 Fees

- (a)** Describe services included in the assessment process and list all fees and costs for assessment on a per day basis. Itemize costs wherever possible. List hourly rates for all staff, include position titles.

3.2.3.5 Emerging Small Business Participation

(a) The Port is committed to increasing Emerging Small Business participation in Port business opportunities. Emerging Small Business (ESB) means, for the purposes of this solicitation and resulting contract(s), a for-profit small business enterprise that has been certified by the Oregon State Office of Minority, Women and Emerging Small Business (OMWESB, www.oregon.gov/DCBS/OMWESB/index.shtml) as an Emerging Small Business enterprise. ESBs may also be certified as disadvantaged, minority-owned, or women-owned businesses. However, for the purposes of this participation program, a business certified as a disadvantaged, minority-owned, or woman-owned business that is not *also* certified as an ESB will not be counted in determination of ESB participation.

(b) Each fiscal year the Port establishes an annual ESB participation target which is different from the Federal disadvantaged business goal. If this project is to be funded in part or whole by Federal funds, there will be a separate section in this RFP explaining the Federal requirements. Even if there are no Federal requirements for this project, the Port strongly encourages all proposers to consider how they can help the Port achieve its ESB participation target. The proposal shall address the following:

- (i)** Is the proposer an ESB certified by the OMWESB?

(ii) Provide a narrative description of the proposer's experience in promoting ESB participation as partners, subcontractors, or suppliers on previous projects. Describe any innovative or successful measures that the proposer has undertaken to increase ESB participation on projects. Include a list of ESBs with which the proposer's firm has had a contractual relationship during the last 12 months.

(iii) Describe portions of the work the proposer may be able to subcontract, and identify work items that could be performed by ESBs.

(iv) Describe the actions and strategies the proposer will take to increase ESB participation in this work. Include names of ESBs that will be part of the team for this project.

3.2.3.6 References

(a) Provide names and current contact information of at least two references who have direct knowledge of the firm's ability to execute required services

(b) Provide names and current contact information of at least two references for individual staff

4. EVALUATION PROCEDURES

4.1 Competitive Range

An evaluation team will determine which proposals are within the competitive range in accordance with the evaluation criteria set forth in Section 3. Only those proposals determined to be within the competitive range will be considered for award.

4.2 Evaluation Team Members

One or more evaluation team members may conduct an initial evaluation of all proposals, using the evaluation criteria set forth in Section 3, and may identify a subset of proposals as finalists for further evaluation by the evaluation team. After the initial evaluation, members of the evaluation team may perform any of their functions individually, or as a group consisting of two or more evaluation team members. If particular functions are performed by individual evaluation team members or by a group consisting of less than the full evaluation team, the evaluation team members performing the functions shall report to the full team a summary of the information gathered or conclusions reached. A report of final evaluation results and any recommendation regarding award of a contract may be made to the Executive Director or the Executive Director's designee without the participation of all evaluation team members, provided that a majority of evaluation team members participate.

4.3 Interviews

Selected proposers may be invited to participate in an interview stage of the evaluation process. Proposers should be prepared to respond to questions related specifically to their proposals and other pertinent matters with respect to the RFP.

Exhibit A

Port of Portland

Organization Effectiveness Consulting Services as Required

- ☐ Scope A (Section 1.3.1): Executive Development and Executive Coaching
- ☐ Scope B (Section 1.3.2): Organization Assessment and Intervention Services

Solicitation No. 2008-0026

The undersigned proposer submits this proposal in response to the Port of Portland's (Port's) Request for Proposal (RFP) dated March 18, 2008 for the contract named and scope checked above.

The proposer warrants that proposer has carefully reviewed the RFP and that this proposal represents proposer's full response to the requirements described in the RFP. The proposer further warrants that if this proposal is accepted, the proposer will contract with the Port, agrees to all terms and conditions found in the attached sample contract, and will provide all necessary labor, materials, equipment, and other means required to complete the work in accordance with the requirements of the RFP and contract documents.

The proposer further warrants that the proposer has not and will not discriminate, in violation of ORS 279A.110, or any other local, state or federal law, against any minority, women or emerging small business enterprise or other protected individuals, in the development or presentation of this proposal, or in obtaining any required subcontract.

The proposer hereby acknowledges the requirement to carry or indicates the ability to obtain the insurance required in Section 14 of the sample contract (Exhibit B).

Indicate in the affirmative by initialing here: _____

The proposer hereby acknowledges receipt of Addendum Nos. __, __, __, __, __ to this RFP.

Name of Proposer: _____
Business Address: _____

Telephone Number: _____
Fax Number: _____
Email Address: _____

Authorized Signature: _____
Printed/Typed Name: _____
Title: _____
Date: _____