



RFP No. BOEC007

PROFESSIONAL, TECHNICAL AND EXPERT SERVICES

City of Portland, Oregon
September 10, 2012

REQUEST FOR PROPOSALS

for

Project Management to Implement a 311 Call Center

PROPOSALS DUE: October 15, 2012 by 4:00 p.m.

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

SUBMITTAL INFORMATION: Refer to PART II, SECTION B.3 (PROPOSAL SUBMISSION)

Submit the Proposal to:

City of Portland
Laura Wolfe
Bureau of Emergency Communications
3732 SE 99TH Avenue
Portland, OR 97266

Refer questions to:

Laura Wolfe
Phone: (503) 823-4762
Email: laura.wolfe@portlandoregon.gov

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.

CITY SUSTAINABILITY OBJECTIVES – The City has a history of striving to be more sustainable in its operations and planning. Starting with the City's Sustainable City Principles (1994) the City has established a variety of policies to guide its work on sustainability, including: the Sustainable Procurement Policy, Green Building Policy, Climate Action Plan, and the Stormwater Management Manual (to view these and related City policies, go to the Portland Policy Documents Website: <http://www.portlandonline.com/auditor/index.cfm?c=26818>). As applicable to City procurement, these policies guide the City to buy products and services that reduce the City's negative environmental and social impacts, while maintaining fiscal health in the short and long term. As such, the City seeks to do business with firms that will actively contribute to the City's sustainability objectives.

ENVIRONMENTAL CLAIMS – Upon request, the vendor must provide and make publicly available verifiable evidence supporting every environmental claim made about the products or services provided to the City. Environmental claims for which verifiable evidence must be provided include any claim provided on products, product packaging, product or service sales literature and websites, and information provided to respond to this solicitation.

INVESTIGATION – The Proposer shall make all investigations necessary to be informed 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 meeting, 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 City bureaus, 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 rejected as non-responsive and 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 may 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 who are 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 Proposer shall obtain a current City of Portland Business License prior to initiation of contract and commencement of the work.

WORKERS' COMPENSATION INSURANCE – Successful Proposer 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 – Successful 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 Procurement Services, City of Portland, prior to contract execution.

EQUAL BENEFITS PROGRAM – Successful 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 Procurement Services, City of Portland, prior to contract execution.

LOCAL CONTRACTING – If the final evaluation scores are otherwise equal, the City prefers goods or services that have been manufactured or produced by a Local Business. The City desires to employ local businesses in the purchase, lease, or sale of any personal property, public improvements or services. The City wants the residents of the State of Oregon and SW Washington to benefit from optimizing local commerce and services, and the local employment opportunities they generate. [City of Portland Resolution #36260]

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 request for proposals, and that the Proposer is competing solely in its own behalf without connection with or obligation to, any undisclosed person or firm.

PUBLIC RECORDS – Any information provided to the City pursuant to this RFP shall be public record and subject to public disclosure pursuant to Oregon public records laws (ORS 192.410 to 192.505). Any portion of a proposal that the proposer claims as exempt from disclosure must meet the requirements of ORS 192.501(2) and ORS 192.502(4) and/or ORS 646.461 et seq. The fact that a proposer marks and segregates certain information as exempt from disclosure does not mean that the information is necessarily exempt. The City will make an independent determination regarding exemptions applicable to information that has been properly marked and redacted. Information that has not been properly marked and redacted may be disclosed in response to a public records request. When exempt information is mixed with nonexempt information, the nonexempt information must be disclosed.

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 Chief Procurement Officer 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 Instructions 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 mission of the Bureau of Emergency Communications (hereafter BOEC) is to serve the public by providing the vital link between citizens in need with the proper emergency service responder by means of the most efficient operating systems available.

2. BACKGROUND

The City of Portland (hereafter City) operates The Information and Referral (I&R) line, (503) 823-4000, which directs calls and concerns to the proper City or County Bureau/Department. This department is currently operated under of the Office of Neighborhood Involvement (ONI) and is located in City Hall office and the lobby of the Portland Building. Presently, the City has an intergovernmental agreement with Multnomah County to provide information and referral services for Multnomah County, as well as the City of Portland. The I&R staff is comprised of one (1) supervisor, and five (5) staff who answer questions or transfer callers to the appropriate agency as necessary. A future location will need to be identified and secured to accommodate the growth of the 311 system, as well as to house a backup 9-1-1 center.

The heart of the 311 system is a centralized entry point for all non-emergency phone calls and service requests, making it easier for the community to sift through the complex layers of government. 311 allows City Bureaus and County Departments to evaluate their customer service, service requests and business operations through a single point of intake. 311 provides one easy-to-use number for the community to access a wide range of government services, while providing Bureaus and Departments with an efficient, organized, detailed tool to help manage and improve the way they do business. By working together, City Bureaus, County Departments and 311 will streamline the way citizens access local government branches into one cohesive unit - with one goal in mind: to serve the City of Portland and Multnomah County more efficiently.

A 311 service will free up the emergency 9-1-1 system from having to deal with non-emergency calls. The 311 system streamlines non-emergency service requests with one centralized phone number for almost all local government provision situations - from potholes to business licenses to parks reservations. A 311 Call Center also provides an essential role in emergency preparedness and response. With an effective 311 Call Center in place, local government will be much better prepared in its emergency communication response role

3. SCOPE OF WORK

The City is seeking proposals from product neutral individuals, firms, teams or consultants, hereafter called Proposer(s), with demonstrated technical experience and project management skills in implementing 311 customer service centers, to perform a comprehensive assessment/evaluation of the City's organization, infrastructure, and business processes as it relates to customer service functions and what would be required to perform a phased implementation of a world class consolidated 311 call center.

Proposer will facilitate the City's goal to implement a 311 Customer Service Center that transitions the City to a new generation of technology that centralizes citizen requests and responses through a comprehensive public sector and citizen focused customer service center. The City anticipates that the successful consultant will provide services in three phases. Phase 2 and the retention of the Project Manager, is predicated upon

the successful completion of Phase 1, and Phase 3 and the retention of the Project Manager, on the successful completion of Phase 2.

Phase 1 – Assessment. Phase 1 is focused on establishing the business case for implementation of Portland 311. A comprehensive analysis of the City’s “As Is” call taking environment will be conducted, a “To Be” citywide service delivery model will be recommended, and the City’s readiness, capabilities, and capacity to implement the recommended model will be assessed.

Phase 2 – Implementation Plan. Based on the recommendations produced during Phase 1, a detailed implementation plan will be developed. The plan will identify activities, tasks, timing, resources, responsibilities, budget, change management strategies and risk mitigation requirements for successful deployment of the 311 Call Center.

Phase 3 – Project Management Services. Upon the City’s determination to go forward with the recommendations of Phases 1 and 2, Phase 3 will commence. The Implementation Plan developed in Phase 2 will be activated, resulting in mobilization of resources toward successful design, development, and deployment of the Portland 311 Call Center.

4. PROJECT FUNDING

The City has not determined the anticipated cost for the requested services. 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.

SECTION B

WORK REQUIREMENTS

1. TECHNICAL OR REQUIRED SERVICES

This project will be divided into three (3) phases as identified below. 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.

Project Phases and Work Schedule. For each Phase, the Proposer shall develop a complete detailed project plan (Project Plan and Work Schedule) as approved by the City. Each Project Plan and Work Schedule shall, at a minimum: (i) include detailed schedules that specify a detailed level of activity, including the planned start dates, completion dates, hours and other required resources for activities to be performed by Proposer (and City where applicable) pursuant to the Project for which such Project Plan and Work Schedule was developed; (ii) identify any pre-existing hardware, software, components and/or tools to be used; (iii) include a detailed list of the deliverables and milestones (with planned delivery/completion dates) and the project management reports that will be provided; (iv) describe any assumptions made in compiling the plan; (v) define roles and responsibilities of Proposer and applicable City personnel; (vi) provide a risk assessment and cost/benefit analysis for the Project; (vii) assess the extent to which resources are available and required to perform each Project. Following approval by City, Proposer shall perform such work in accordance with the applicable Infrastructure Project Plan and Work Schedule.

Phase 1 – Assessment

Conduct a comprehensive assessment and analysis of the City’s current state with regard to its readiness for implementation of a 311 system. 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. The assessment should include, but not be limited to the following areas:

- A review of each City department and the City at large, including an evaluation

of each department's service functions that would make use of a streamlined service delivery currently provided as walk-in, phone, or internet.

- Review the current access points into City and County services.
- Assess Citywide / Countywide Bureau and Department business processes, technology and customer service practices and make recommendations for implementation of a 311 center.
- Develop, administer and analyze citizen satisfaction survey data and data from any focus groups conducted from a 311 perspective.
- Meet with key stakeholders, including, executives, top management, line staff, citizens, partners and associates of the City to gain additional perspectives needed to produce the deliverables.
- Conduct an Assessment of the City's Capabilities and Limitations.
 - Identify and Assess Customer Service Oriented Departments
 - Identify and Assess Existing City Customer Service Oriented Infrastructures
 - Review and identify the impact of the existing structure both from an organization perspective and from a system (technical) perspective.
 - Call Center operations structure
 - Applications and technology platform consolidation
 - Internal and external communications requirements
- Cost/benefits analysis of the potential implementation of a 311 Customer Service Center considering the existing capabilities of the City. This cost analysis should include the total costs for implementation, and resulting savings to be gained from efficiencies achieved through the centralized 311 center.
- Identify and analyze other relevant factors for purposes of assessing the current state of readiness for the implementation of 311
- Assess and document Customer Support Business Processes
- Identify "AS IS" Environment that should be reengineered:
 - Current call types by Department
 - FAQ's , Service Requests, Directory, etc. calls
 - Current service level agreements
 - Current call volumes
 - Current customer interactions
 - Current customer service channels
 - Business process flows
 - Current customer service oriented technology
 - Costs of customer interactions
- Perform a gap analysis of current service delivery with best practices from a 311 perspective.
 - Identify "Core Departments"
 - Estimate call types and volumes, including growth models
 - Recommend call center hours
 - Estimate staffing requirements, including peak periods.
 - Estimate skill set requirements
 - Estimate training requirements

- Identify Knowledge Base requirements
 - Recommend Implementation Project Governance Model
 - Recommend Call Center Operations Governance model
 - Recommend communications planning model
 - Technology enhancement recommendations (phone, network)
 - Back Office Interface/Integration recommendations
 - Facility enhancement recommendations (build out, furnishing)
 - Identify Risks/Challenges
 - ◆ Operational
 - ◆ Organizational
 - ◆ Cultural
- Develop a change management plan which includes strategies to most effectively combine disparate bureaus and offices together for the 311 project. This plan shall make recommendations with regard to the most successful way to garner support from all bureaus for this effort.
 - Develop staffing policies and recommendations to ensure the 311 Call center is staffed with qualified and trained individuals to meet the high demands of a 311 call center environment.
 - Create a high-level plan which will identify the requirements that will be included in an RFP for a Customer Relationship Management (CRM) solution incorporating the principles that lead to a successful CRM implementation.
 - Work with City staff to identify and recommend required CRM software and hardware. Define a proposed architecture for the overall CRM solutions; the proposed architecture will focus on the 311 call center, CRM software, and the integration with existing systems.
 - Review the City's portal strategy and current Internet service capabilities and provide recommendation on integrating into the 311 software's online service offerings.
 - Develop Project Cost Estimates:
 - Staffing
 - Technology
 - Facility
 - Other
 - Identify grant funding opportunities for the 311 Project.
 - Follow security requirements of the City and protect the confidentiality of all materials provided.

Phase 2 – Implementation Plan

Upon review and acceptance of the assessment, develop an implementation plan together with a work schedule leading up to deployment of a 311 customer service center. The implementation plan must be based in part on the findings in the assessment and agreed upon by the City. The Implementation Plan must be detailed and shall, at a minimum include a schedule that specifies a detailed level of activity, including the planned start dates, completion dates, responsible staff and other required activities to be performed by consultant and by the City.

Phase 3 – Project Management Services

Precise execution of the Implementation Plan is imperative to the successful launch and deployment of the 311 call center. The consultant will provide oversight,

management and roll-out support for the project through both soft and hard launch of the 311 customer service center by established due dates.

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:

Phase 1 - Stage 1, will incorporate the first 4 tasks identified in this Statement of Work:

- Task 1 – Assess Capabilities and Limitations
- Task 2 – Develop Gap Analysis and Recommendations
- Task 3 – Develop Project Cost Estimates
- Task 4 – Conduct Value Assessment

Upon completion of this stage Proposer will summarize and present their initial findings to the City, including detailed projections of cost and high level benefits of implementation. Once Stage 1 is completed the City will have the option of continuing with the remainder of the project with Phase 2.

Based on the recommendations produced during Phase 1, a detailed implementation plan will be developed. The plan will identify the necessary activities, tasks, timing, resources, responsibilities, budget, and risk mitigation requirements for successful deployment of the 311 Call Center.

Upon the City's determination to go forward with the recommendations of Phases 1 and 2, Phase 3 will commence. The Implementation Plan developed in Phase 2 will be activated, resulting in mobilization of resources toward successful design, development, and deployment of the City of Portland 311 Call Center.

Successful Proposer should have experience in the following areas:

- Prior 311 Call Center implementation project management
- PMI Certified
- Documented experience working with municipal governments
- General understanding of 9-1-1 and public safety dispatch operations;
- Demonstrated technical expertise with CRM Systems
- Understand CRM and its relationship to a 311 Center.
- Understand the architecture of connections between all participating agencies
- Excellent documentation and reporting skills
- Excellent verbal and written communication skills and working ability with Microsoft Word, Excel, Power Point and Project software.

2. WORK PERFORMED BY THE CITY

The City will assign a Project Manager along with a 311 Project Committee who will oversee the successful Proposer's work and provide support as needed. The Project Manager and 311 Project Committee will primarily be involved in providing overall leadership and guidance to the project, participating in status meetings, and providing input to the final report. The City's Project Manager will work closely with the successful proposer to ensure the City's goals are met by helping to coordinate the City's involvement, address issues that may arise, and review and approve project activities. The City Project Manager will also be responsible for review and acceptance of project deliverables. Additionally the Project Manager and 311 Project Committee will:

- a. Authorize projects
- b. Authorize expenditures, cost overruns, change orders
- c. Review reports

The City's Bureau of Technology Services Staff and other City Subject Matter Experts (SMEs) will be called upon to provide their knowledge and expertise based on their skill sets. Specifically individuals responsible for specific applications, the City's network and

communications, and internet, will be called upon to share knowledge and evaluate recommendations throughout the course of the phase.

The City front line operations Departmental Subject Matter Experts will be called upon to share their knowledge and evaluate recommendations. Additionally they will be asked to disseminate project team communications to their departments.

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 shall provide deliverables electronically in a format mutually-agreed upon with the City. Any hard-copy submittals shall be double-sided and on a minimum 30% PCW recycled content paper to the extent possible. Hard-copy submittals shall be presented in readily recyclable bindings (no plastic covers).

The City anticipates that the successful consultant will provide services in three phases. Phase 2 and the retention of the Project Manager, is predicated upon the successful completion of Phase 1, and Phase 3 and the retention of the Project Manager on the successful completion of Phase 2. The City reserves the right to stop the project and re-solicit for a different Consultant at the completion of each phase of the project. Deliverables and schedule for this project shall include:

Phase 1 – Deliverables

Proposer shall complete and submit a comprehensive written Final Assessment/Report which includes at a minimum but not limited to:

- a. Executive Summary
- b. 311 vision and strategy
- c. 311 Business Plan
- d. Business case detailing the estimated costs, tangible and intangible benefits for the recommended architecture and strategy.
- e. Report describing the current or existing state of service delivery and customer relations throughout the City and all customer groups.
- f. The enterprise view of customer service delivery
- g. Comparison to other successful 311 implementations; including market data relative to 311 implementations, ROI, etc.
- h. Detailed strategy and next steps to successful implementation of a 311 solution at the City with phases delineated for the entire 311 project; make key recommendations which include but are not limited to:
 - o Recommended governance and organizational structure
 - o Bureau and department integration plans and timelines
 - o Detailed tasks, task assignments, status, start and finish dates
 - o Recommendation for Call Center long-term physical location for the 311 center
 - o Staffing requirements - staffing strategies
 - o Change management strategies
 - o Facility and design recommendations
 - o Hardware / Software requirements
 - o Operational periods
 - o Expected call center metrics
 - o Peak periods
 - o Wait times
 - o Cost per call, etc.
 - o Training requirements
 - o Initial estimated implementation budget
- i. High level budgetary estimate for the plan

- j. List of stakeholders and how each stakeholder was involved in the process
- k. List of any relevant out-of-scope factors found during the data collection phase
- l. Create a database/spreadsheet containing the quantified results of the data collection organized such that the City staff will be able to query, summarize, and otherwise analyze the data
- m. Develop business scenarios that depict departmental processes
- n. Identify and make recommendations on those service delivery business processes which need to be modified through a common Customer Relationship Management (CRM) and 311 Call Center
- o. Develop requirements list for the City's 311 functionality and CRM
- p. Develop a list of the City's legacy customer management systems with recommendations on which could be replaced with the CRM and which would need to be kept and integrated into the 311 Call Center operations
- q. Develop a draft report
 - o. Submit to 311 Project Committee for review and comment
 - o. Incorporate comments into final document
 - o. Develop Final Report. The Final Report shall aggregate all deliverables to provide a roadmap to the City for implementing 311, specifically providing results of Proposer's analysis and recommendations:
 - Overview of Recommendations
 - Anticipated Value (ROI)
 - Recommendation of Customer Service/Call Center Governance
 - Recommendation of Call Center Organization
 - Business Case for 311
 - Financial Impact
 - Value Assessment
 - Other Benefits Process
 - Redesign Requirements
 - Technology Redesign/CRM Configuration Requirements
 - Benchmarks and Best Practices
 - Risk assessment
- r. Provide written weekly project status reports showing progress of tasks, accomplishments during the previous week, tasks to be completed the following week, obstacles and problems, and steps being taken to solve the problem
- s. Provide a final report of recommendations and review with key stakeholders who will be identified by the City at a later date. The Final Report will be presented to at minimum the following audience:
 - o. Mayor and City Council
 - o. 311 Project/Evaluation Committee
 - o. Other stakeholders which may be identified
- t. Submit a Monthly Subconsultant Payment and Utilization Report by the 15th of each month with invoice (reference Part II, Section C.5 of the RFP).
- u. Delivery of the Final Report must be on or before June 30, 2013

Phase 2 – Deliverables

During the second phase of this project, the successful Proposer shall develop a list of standard features, which should be considered in the 311 solution. Successful Proposer will validate these with the City and document additional critical features as required by the City. This information will provide the City with selection criteria and a recommendation for selection of a CRM solution for the City's 311 program. The ultimate technology decisions will be based on the City's goals and objectives that will be facilitated by a business process review and business needs assessment prior to the development of an overall technology strategy. Additionally the proposer will:

- a. Develop a list of the City's legacy customer management systems with recommendations on which could be replaced with the CRM and those which need to be kept and integrated into the 311 Call Center operations
- b. Develop business scenarios that depict departmental processes

- c. Review the City's portal strategy and current Internet service capabilities and provide recommendation on integrating into the 311 software's online service offerings
- d. Documented high level requirements and functionality
- e. Work with City staff to identify and recommend required CRM hardware and software
- f. Develop requirements list for the City's 311 CRM functionality
- g. Provide a recommended CRM architecture and strategy
- h. Provide a written RFP for a CRM
- i. Provide a short list of CRM Proposers (minimum of three Proposers)
 - o Facilitate Proposer demonstrations for the City
 - o Develop scorecard to assist the City in rating Proposers
 - o Assist the City in rating Proposer
 - o Proposer selection and contract
- j. Aid in the procurement of a CRM system in conjunction with Portland City Code 5.33 and the Goods and Services department of Purchases
- k. Delivery of the Final written CRM solicitation by September 30, 2013

Phase 3 - Deliverables

Deliverables will principally require the consultant to participate in regularly scheduled meetings with staff, monitor progress, and provide all necessary management, leadership and technical support required to deploy the project.

Phase 3 shall include the following:

- a. Provide project management for the implementation of the selected CRM system
- b. Provide written reports to the 311 Project Team
- c. Attend Project team meetings as required
- d. Coordinate projects with Project Team

Each deliverable will be provided in draft electronic form for review, testing, and comment at least 30 days prior to project completion. All deliverables and resulting work products from this contract will become the property of the City of Portland.

Due to the confidential nature of the information available and the sensitivity to security needs of the City, the contractor will turn over any data or documentation used in the preparations of this report. No copies will be retained by the contractor. All documentation related to this project will be delivered to the City for retention.

All deliverables and resulting work products from this contract will become the property of the City of Portland. The City of Portland will own the copyright to any and all documents and products as a result of this project.

4. PLACE OF PERFORMANCE

Contract performance will take place primarily at the successful 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 for Phase 1, by June 30, 2013 and Phase 2, by September 30, 2013. The Phase 3 deliverable date will be determined by the City after the final deliverables for Phase 1 and Phase 2 have been received and reviewed.

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 obtain and maintain in full force, and at its own expense, throughout the duration of the contract and any warranty or extension periods, the required insurances identified below. The City reserves the right to require additional insurance coverage as required by statutory or legal changes to the maximum liability that may be imposed on Oregon cities during the term of the contract. Successful Proposer shall provide evidence that any or all subcontractors performing work or providing goods or services under the contract have the same types and amounts of insurance coverage as required herein or that the subcontractor is included under the Successful Proposers policy

Workers' Compensation Insurance: Successful Proposer shall comply with the workers' compensation law, ORS Chapter 656 and as it may be amended. Unless exempt under ORS Chapter 656, The Successful Proposer and any/all subcontractors shall maintain coverage for all subject workers for the entire term of the contract including any contract extensions.

Commercial General Liability Insurance: Successful Proposer shall have Commercial General Liability (CGL) insurance covering bodily injury, personal injury, property damage, including coverage for independent successful Proposer's protection (required if any work will be subcontracted), premises/operations, contractual liability, products and completed operations, in per occurrence limit of not less than \$1,000,000, and aggregate limit of not less than \$2,000,000.

Automobile Liability Insurance: Successful Proposer shall have automobile liability insurance with coverage of not less than \$1,000,000 each accident. The insurance shall include coverage for any auto or all owned, scheduled, hired and non-owned auto. This coverage may be combined with the commercial general liability insurance policy.

Professional Liability & Errors & Omissions Insurance: Successful Proposer shall have Professional Liability and/or Errors & Omissions insurance to cover damages caused by negligent acts, errors or omissions related to the professional services, and performance of duties and responsibilities of the Successful Proposer under this contract in an amount with a combined single limit of not less than \$1,000,000 per occurrence and aggregate of \$2,000,000 for all claims per occurrence. In lieu of an occurrence based policy, Successful Proposer may have claims-made policy in an amount not less than \$1,000,000 per claim and \$3,000,000 annual aggregate, if the Successful Proposer obtains *an unlimited* extended reporting period or tail coverage. Successful Proposer shall provide proof of insurance through satisfactory certificate(s) of insurance to the City.

Additional Insurance: As required by Federal Law or State Statute or City Code such as Bailees Insurance, Maritime Coverage, or other coverage as required by law,

Additional Insured: The liability insurance coverage, except Professional Liability, Errors and Omissions, or Workers' Compensation, shall be without prejudice to coverage otherwise existing, and shall name the City of Portland and its bureaus/divisions, officers, agents and employees as Additional Insureds, with respect to the Successful Proposer's activities to be performed, or products or services to be provided. Coverage shall be primary and non-contributory with any other insurance and self-insurance. Notwithstanding the naming of additional insureds, the insurance shall protect each additional insured in the same manner as though a separate policy had been issued to each, but nothing herein shall operate to increase the insurer's liability as set forth elsewhere in the policy beyond the amount or amounts for which the insurer

would have been liable if only one person or interest had been named as insured.

Continuous Coverage; Notice of Cancellation: The Successful Proposer agrees to maintain continuous, uninterrupted coverage for the duration of the Contract. There shall be no termination, cancellation, material change, potential exhaustion of aggregate limits or non renewal of coverage without thirty (30) days written notice from Successful Proposer to the City. If the insurance is canceled or terminated prior to completion of the Contract, Successful Proposer shall immediately notify the City and provide a new policy with the same terms. Any failure to comply with this clause shall constitute a material breach of Contract and shall be grounds for immediate termination of this Contract.

Certificate(s) of Insurance: Successful Proposer shall provide proof of insurance through acceptable certificate(s) of insurance to the City prior to the award of the Contract if required by the procurement documents (e.g., request for proposal), or at execution of Contract and prior to any commencement of work or delivery of goods or services under the Contract. The Certificate(s) will specify all of the parties who are endorsed on the policy as Additional Insureds (or Loss Payees). The insurance coverage required under this Contract shall be obtained from insurance companies acceptable to the City of Portland. The Successful Proposer shall pay for all deductibles and premium. The City reserves the right to require, at any time, complete, certified copies of required insurance policies, including endorsements evidencing the coverage the required.

SECTION C

1. INDEX

2. SAMPLE CONTRACT

ATTACHMENTS

Exhibit A First Tier Subconsultant Disclosure Form (submit with proposal)

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

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

2. RFP CLARIFICATION

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 five (5) days prior to proposal due date. 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.

Laura Wolfe
Bureau of Emergency Communications
3732 S.E. 99th Avenue
Portland, Oregon 97266

E-mail: laura.wolfe@portlandoregon.gov
Phone: (503) 823-4762

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 fifty (**50**) pages. Section dividers, resume's, supporting documentation title page, table of contents, or other attachment materials 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 requests the use of submittal materials (i.e. paper, envelopes, etc.) that contain post-consumer recycled content and are readily recyclable. Submittals shall **NOT** include 3-ring binders or any plastic binding, folders, or indexing materials. Reusable binding posts, clips or rings and recycled content paper envelopes or folders are examples of acceptable bindings. Submittals shall be printed 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.

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.

3. PROPOSAL SUBMISSION

For purposes of this proposal submission, the proposer shall submit: one (1) original printed copy and **five (5)** additional printed copies. If the proposer requests redactions please **an unprotected MS Word format document with redactions highlighted on a USB flash drive or CD**. If no redactions are requested please state that in the Cover Letter portion of your submittal. The entire proposal submittal must be received at the place and on or before the time and date specified on the cover page of this RFP document.

REDACTION FOR PUBLIC RECORDS: Any portion of a proposal that the proposer claims as exempt from disclosure must meet the requirements of ORS 192.501(2), ORS 192.502(4) and/or ORS 646.461 et seq. Proposers are required to submit a redacted copy of their proposal and all attachments. "Redaction" means the careful editing of a document to obscure confidential references; a revised or edited document thereby obscuring the exempt information but otherwise leaving the formatted document fully intact. **The redacted copy must be a complete copy of the submitted proposal, in which all information the Proposer deems to be exempt from public disclosure has been identified.**

When preparing a redaction of your proposal submission, a proposer must plainly mark, but leave readable, the redactions by highlighting the specific areas your firm asserts are exempt from public disclosure. In addition, a summary page identifying the pages where redactions occur shall be included with the proposal submission (summary is not included in page limitations). **If a proposer fails to submit a redacted copy of their proposal as required, the City may release the proposer's original proposal without redaction.** 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.

Unless expressly provided otherwise in this RFP or in a separate written communication, the City 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 City agrees not to disclose proposals until the City has completed its evaluation of all proposals and publicly announces the results.

Please refer to the GENERAL INSTRUCTIONS AND CONDITIONS for more information about confidential information within public records.

4. ORGANIZATION OF PROPOSAL

Proposers must provide all information as requested in this Request for Proposal (RFP). 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 proposal, 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
- full legal name of proposing business entity
- 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 address
- statement that no redactions are requested, if applicable

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

BUSINESS COMPLIANCE

The successful Proposer(s) 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

The successful Proposer(s) must be certified as Equal Employment Opportunity Employers as prescribed by Chapter 3.100 of the Code of the City of Portland prior to contract award. Details of certification requirements are available from Procurement Services, 1120 SW Fifth Avenue, Room 750, Portland, Oregon 97204, (503) 823-6855, website: <http://www.portlandonline.com>. To apply for certification go to our website at: www.ebidexchange.com/cityofportland.

Non-Discrimination in Employee Benefits (Equal Benefits)

The successful Proposer(s) must be in compliance with the City's Equal Benefits Program as prescribed by Chapter 3.100 of the Code of the City of Portland prior to contract award. Details of compliance requirements are available from Procurement Services, 1120 SW Fifth Avenue, Room 750, Portland, Oregon 97204, (503) 823-6855, website: www.portlandonline.com. To apply for certification go to our website at: www.ebidexchange.com/cityofportland.

Business License

The successful Proposer(s) 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 prior to contract award. 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, is in compliance with the Equal Benefits Program, and is EEO certified, include in the Cover Letter your firm's City of Portland Business License number, a statement that your firm's Equal Benefits Application has been approved as well as your Equal Employment Opportunity (EEO) expiration date.

2. PROJECT TEAM

Please provide the following:

- a. A detailed description of firm's approach to overall management and integration of all activities required by the scope of work, including the management

objectives and techniques that demonstrate how the work requirements will be met. Include how the firm will respond promptly to problems and any changes to scope of work.

Key personnel's resumes that demonstrate that the individual(s) meet the qualification and experience requirements for performing the work outlined in Part I, Section B.

3. PROPOSER'S CAPABILITIES

The Successful Proposer shall have the expertise, certifications, demonstrated experience, financial stability and staffing capacity to quickly initiate and sustain an undertaking of this magnitude. The assigned lead for this project shall be identified in the proposal and cannot be altered throughout the project unless agreed to by both the City of Portland and the selected firm.

- a. Describe similar projects performed within the last six (6) years, which best characterize firm's capabilities, work quality and cost control
- b. Demonstrate how the assigned lead consultant for this project has exemplary and applicable experience to manage a project and direct staff in support of a project this size
- c. Describe similar projects with other government agencies
- d. Describe firm's resources available to perform the work for the duration of the project and other on-going projects
- e. Describe firm's internal procedures and/or policies associated or related to work quality and cost control
- f. Describe firm's management and organizational capabilities.

4. PROJECT APPROACH AND UNDERSTANDING

The Proposer's approach and understanding of the project are important aspects of the RFP process. The Proposers should provide a 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:

- a. 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.
- b. Describe the proposed work products that will result from each task or activity.
- c. Identify points of input and review with City staff.
- d. Identify the time frame estimated to complete each task.
- e. Identify methodologies team members will use to reduce the environmental impact of completing the scope of work. Address meeting transportation/commuting practices, "green" meeting practices, use of teleconferencing or travel carbon offsets, and office practices that minimize waste generation and energy use.

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. 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. The City has assigned at least 15% of the total points available on this solicitation to this criterion to determine the award of this contract.

All Proposers shall address the following in their proposals:

- a. 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). Provide a copy of the State of Oregon certification letter confirming receipt of application, or a copy of the approval letter certifying your firm as a State of Oregon M/W/ESB (a copy of this letter does not affect the page-limit identified under Part II, Section B.2 of this document).

- b. 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.
- c. 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.
- d. Are you subcontracting any element of your proposal? Describe your firm's plan for obtaining maximum utilization of State of Oregon 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 State of Oregon certified M/W/ESB firms on this project, please list those firms and detail their role within your proposal. In addition, **all Proposers must submit Exhibit A - First Tier Subconsultant Disclosure Form 1** with their proposal, which requires Proposers to identify the following:
- The names of **all** subconsultants to be used on this project with subcontracts greater than or equal to \$10,000.
 - The names of all State of Oregon certified MBE, WBE and ESB firms. If firms have more than one certification (i.e., ESB and MBE, and/or ESB and WBE) note that on the form so that proper credit can be given for the ESB goal and for tracking MBE and WBE utilization.
 - The proposed scope or category of work for each subconsultant.
- If Proposers will not be using any subconsultants that are subject to the above disclosure requirements, Proposers are required to indicate "**NONE**" on the First Tier

Subconsultant Disclosure Form 1.

The City expects thoughtful consideration of all of the above Diversity in Employment and Contracting criteria in the preparation of proposals. The City will enforce all diversity in workforce and M/W/ESB commitments submitted by the successful Proposer, and the successful Proposer will be required to submit a completed Monthly Subconsultant Payment and Utilization Report to ensure that subconsultants are utilized to the extent originally proposed and submitted in its proposal. The successful Proposer will not be permitted at any time to substitute or add a subconsultant without the prior written approval of the Chief Procurement Officer. ALL subconsultants, including M/W/ESB firms, and first tier subconsultants shall be reported on the Monthly Subconsultant Payment and Utilization Report as well as contract amounts and payments. For reference, a copy of this form may be obtained at: <http://www.portlandonline.com/shared/cfm/image.cfm?id=119851> .

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.

Provide separate price proposals for each of the three project phases.

<u>Project Phase</u>	<u>Proposed Lump Sum</u>
a. Phase 1	\$ _____
b. Phase 2	\$ _____
c. Phase 3	\$ _____

7. SUPPORTING INFORMATION

Supporting material must include a minimum of **Three (3)** 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	25
d.	Project Approach and Understanding	25
e.	Diversity in Employment and Contracting	15
f.	Proposed Cost	15
g.	Supporting Information	0
	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 committee member 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 the evaluation process.

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 **ten (10)** 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 may be considered preliminary. Final scores, based on the same evaluation criteria, will be determined following the oral 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 may 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 who are 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

At any point during the evaluation process, the City is permitted, but is not required, to seek clarification of a proposal. However, a request for clarification does not permit changes to a proposal.

SECTION B

CONTRACT AWARD

1. CONSULTANT SELECTION

The City will attempt to reach a final agreement with the highest scoring Proposer. However, the City may, in its sole discretion, terminate negotiations and reject the proposal if it appears agreement cannot be reached. The City may then attempt to reach a final agreement with the second highest scoring Proposer and may continue on, in the same manner, with remaining proposers until an 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. Any information included as part of this contract shall be a public record and not exempt from disclosure, including items redacted from the proposal. 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 or confidential and meeting the requirements of ORS 192.501, 192.502 and/or ORS 646.461 et seq., 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:

Protests may be submitted to the Chief Procurement Officer only for formal solicitations resulting in contract(s) individually valued at or above the Formal Solicitation Process Dollar Threshold (reference www.portlandonline.com/omf/index.cfm?c=44169&a=74585), and only from those Proposers who would receive the contract if their protest was successful.

Protests must be in writing and received by the Chief Procurement Officer within seven (7) calendar days, UNLESS OTHERWISE NOTED, following the date the City's Notice of Intent to Award, Notice to Short List, or notification for non-responsiveness was issued. The protest must specifically state the reason for the protest and show how its proposal or the successful proposal was mis-scored, or show how the selection process deviated from that described in the solicitation document. No contract will be awarded until the protest has been resolved.

Protests must be timely and 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 Chief Procurement Officer may waive any procedural irregularities that had no material effect 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 Chief Procurement Officer shall

issue a notice canceling the Notice of Intent to Award.

Decisions of the Chief Procurement Officer are final and conclude the administrative appeals process.

4. KICK-OFF MEETING

If requested by the City, the successful Proposer shall begin work by attending an orientation meeting to take place within **10** days following execution of the contract. The successful Proposer shall then develop and maintain a comprehensive schedule for all elements of the project.

EXHIBIT A

CITY OF PORTLAND PROFESSIONAL TECHNICAL & EXPERT (PTE) SERVICES FIRST TIER SUBCONSULTANT DISCLOSURE FORM

CITY PTE DISCLOSURE REQUIREMENTS

The City's disclosure program was adopted to document the use of subconsultants on City projects over \$100,000; particularly Oregon certified Minority, Women and Emerging Small Businesses (M/W/ESBs).

This Request for Proposal (RFP) requires submission by the Proposer of the First Tier Subconsultant Disclosure Form. When the contract amount of a first-tier subconsultant furnishing services, labor or labor and materials would be greater than or equal to \$10,000, the Proposer must disclose the following information about such subconsultants:

- 1) The subconsultant's contact information and Employer Identification Number (EIN or FED ID#)
- 2) State of Oregon M/W/ESB designation
(Verify certification status with the Office of Minority, Women and Emerging Small Business at <http://egov.oregon.gov/DCBS/OMWESB/index.shtml>)
- 3) The proposed scope or category of work that the subconsultant will be performing
- 4) The amount of the subconsultant's contract
- 5) Report all amounts in United States Dollars (USD)

If the Proposer will not be using any subconsultants that are subject to the above disclosure requirements, the Proposer is required to indicate "**NONE**" on the accompanying form.

ATTACHMENTS: Form 1: City of Portland PTE First Tier Subconsultant Disclosure Form

**CITY OF PORTLAND
PTE FIRST TIER SUBCONSULTANT DISCLOSURE FORM
(FORM 1)**

This Request for Proposal requires submission by the Proposer of the First Tier Subconsultant Disclosure Form. When the contract amount of a first tier subconsultant furnishing services, labor or labor and materials would be greater than or equal to \$10,000, the Proposer must disclose the following information about that subconsultant.

Proposer Name: _____ **Proposer's Total Cost:** _____
RFP Number: _____ **Project Name:** _____

SUBCONSULTANT INFORMATION (Please Print)	M/W/ESB	SCOPE/TYPE OF WORK	SUBCONTRACT AMOUNT
Firm Legal Name: Email: Phone #: Fax#: FED ID OR EIN # (No SS#):			\$
Firm Legal Name: Email: Phone #: Fax#: FED ID OR EIN # (No SS#):			\$
Firm Legal Name: Email: Phone #: Fax#: FED ID OR EIN # (No SS#):			\$
Firm Legal Name: Email: Phone #: Fax#: FED ID OR EIN # (No SS#):			\$
Firm Legal Name: Phone #: Email: Fax#: FED ID OR EIN # (No SS#):			\$

NOTE:

- 1) Report all amounts in United States Dollars (USD)
- 2) If the Proposer will not be using any subconsultants that are subject to the above disclosure requirements, the Proposer is required to indicate "NONE" on this form.
- 3) All subconsultants with contracts \$10,000 or over must be listed on this form. Leave M/W/ESB column blank if firm is not confirmed certified through the *State of Oregon Office of Minority, Women and Emerging Small Business*: <http://egov.oregon.gov/DCBS/OMWESB/index.shtml>.
- 4) Do not enter social security numbers on this form.