



**REQUEST FOR PROPOSALS #2018-42**

**FOR**

**ELECTRONIC PLAN REVIEW IMPLEMENTATION PROJECT MANAGER**

**BOARD OF COUNTY COMMISSIONERS**

**JIM BERNARD, Chair**

**SONYA FISCHER, Commissioner**

**KEN HUMBERSTON, Commissioner**

**PAUL SAVAS, Commissioner**

**MARTHA SCHRADER, Commissioner**

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**Donald Krupp  
County Administrator**

**George Marlton  
Procurement Division Director**

**Ryan Rice  
Analyst**

**PROPOSAL CLOSING DATE, TIME AND LOCATION**

**DATE: September 18, 2018**

**TIME: 2:00 PM, Pacific Time**

**PLACE: Clackamas County Procurement Division  
Clackamas County Public Services Building  
2051 Kaen Road, Oregon City, OR 97045**

## **SCHEDULE**

Request for Proposals Issued.....	August 21, 2018
Protest of Specifications Deadline.....	August 28, 2018, 5:00 PM, Pacific Time
Deadline to Submit Clarifying Questions.....	September 6, 2018, 5:00 PM, Pacific Time
Request for Proposals Closing Date and Time.....	September 18, 2018, 2:00 PM, Pacific Time
Deadline to Submit Protest of Award.....	Seven (7) days from the Intent to Award
Anticipated Contract Start Date.....	October, 2018

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## SECTION 1 NOTICE OF REQUEST FOR PROPOSALS

Notice is hereby given that Clackamas County through its Board of County Commissioners will receive sealed Proposals per specifications until **2:00 PM, September 18, 2018** (“Closing”), to provide Electronic Plan Review Implementation Project Management. No Proposals will be received or considered after that time.

The resulting contract from this RFP requires the consultant to begin work in October 2018.

Proposal packets are available from 7:00 AM to 6:00 PM Monday through Thursday at Clackamas County Procurement Division, Clackamas County Public Services Building, 2051 Kaen Road, Oregon City, OR 97045, telephone (503) 742-5444 or may be obtained at <http://www.clackamas.us/bids/>. Sealed Proposals are to be sent to Clackamas County Procurement Services – Attention George Marlton, Director at the above Kaen Road address or may be emailed to [procurement@clackamas.us](mailto:procurement@clackamas.us).

### Contact Information

Procurement Process and Technical Questions: Ryan Rice, [rrice@clackamas.us](mailto:rrice@clackamas.us), (503) 742-5446.

The Board of County Commissioners reserves the right to reject any and all Proposals not in compliance with all prescribed public bidding procedures and requirements, and may reject for good cause any and all Proposals upon the finding that it is in the public interest to do so and to waive any and all informalities in the public interest. In the award of the contract, the Board of County Commissioners will consider the element of time, will accept the Proposal or Proposals which in their estimation will best serve the interests of Clackamas County and will reserve the right to award the contract to the contractor whose Proposal shall be best for the public good.

Clackamas County encourages bids from Minority, Women, and Emerging Small Businesses.

## SECTION 2 INSTRUCTIONS TO PROPOSERS

Clackamas County (“County”) reserves the right to reject any and all Proposals received as a result of this RFP. County Local Contract Review Board Rules (“LCRB”) govern the procurement process for the County.

**2.1 Modification or Withdrawal of Proposal:** Any Proposal may be modified or withdrawn at any time prior to the Closing deadline, provided that a written request is received by the County Procurement Division Director, prior to the Closing. The withdrawal of a Proposal will not prejudice the right of a Proposer to submit a new Proposal.

**2.2 Requests for Clarification and Requests for Change:** Proposers may submit questions regarding the specifications of the RFP. Questions must be received in writing on or before 5:00 p.m. (Pacific Time), on the date indicated in the Schedule, at the Procurement Division address as listed in Section 1 of this RFP. Requests for changes must include the reason for the change and any proposed changes to the requirements. The purpose of this requirement is to permit County to correct, prior to the opening of Proposals, RFP terms or technical requirements that may be unlawful, improvident or which unjustifiably restrict competition. County will consider all requested changes and, if appropriate, amend the RFP. County will provide reasonable notice of its decision to all Proposers that have provided an address to the Procurement Division for this procurement. No oral or written instructions or information concerning this RFP from County managers, employees or agents to prospective Proposers shall bind County unless included in an Addendum to the RFP.

**2.3 Protests of the RFP/Specifications:** Protests must be in accordance with LCRB C-047-0730. Protests of Specifications must be received in writing on or before 5:00 p.m. (Pacific Time), on the date indicated in the Schedule, or within three (3) business days of issuance of any addendum, at the Procurement Division address listed in Section 1 of this RFP. Protests may not be faxed. Protests of the RFP specifications must include the reason for the protest and any proposed changes to the requirements.

**2.4 Addenda:** If any part of this RFP is changed, an addendum will be provided to Proposers that have provided an address to the Procurement Division for this procurement. It shall be Proposers responsibility to regularly check the Bids and Contract Information page at <http://www.clackamas.us/bids/> for any published Addenda or response to clarifying questions.

**2.5 Submission of Proposals:** All Proposals must be submitted in a sealed envelope bearing on the outside, the name and address of the Proposer, the project title, and Closing date/time. Proposals must be submitted in accordance with Section 5.

All Proposals shall be legibly written in ink or typed and comply in all regards with the requirements of this RFP. Proposals that include orders or qualifications may be rejected as irregular. All Proposals must include a signature that affirms the Proposer’s intent to be bound by the Proposal (may be on cover letter, on the Proposal, or the Proposal Certification Form) shall be signed. If a Proposal is submitted by a firm or partnership, the name and address of the firm or partnership shall be shown, together with the names and addresses of the members. If the Proposal is submitted by a corporation, it shall be signed in the name of such corporation by an official who is authorized to bind the contractor. The Proposals will be considered by the County to be submitted in confidence and are not subject to public disclosure until the notice of intent to award has been issued.

No late Proposals will be accepted. Proposals submitted after the Closing will be considered late and will be returned unopened. Proposals may not be submitted by telephone or fax.

**2.6 Post-Selection Review and Protest of Award:** County will name the apparent successful Proposer in a “Notice of Intent to Award” letter. Identification of the apparent successful Proposer is procedural only and creates no right of the named Proposer to award of the contract. Competing Proposers will be notified in writing of the selection of the apparent successful Proposer(s) and shall be given seven (7) calendar days from the date on the “Notice of Intent

to Award” letter to review the file at the Procurement Division office and file a written protest of award, pursuant to LCRB C-047-0740. Any award protest must be in writing and must be delivered by hand-delivery or mail to the address for the Procurement Division as listed in Section 1 of this RFP.

Only actual Proposers may protest if they believe they have been adversely affected because the Proposer would be eligible to be awarded the contract in the event the protest is successful. The basis of the written protest must be in accordance with ORS 279B.410 and shall specify the grounds upon which the protest is based. In order to be an adversely affected Proposer with a right to submit a written protest, a Proposer must be next in line for award, i.e. the protester must claim that all higher rated Proposers are ineligible for award because they are non-responsive or non-responsible.

County will consider any protests received and:

- a. reject all protests and proceed with final evaluation of, and any allowed contract language negotiation with, the apparent successful Proposer and, pending the satisfactory outcome of this final evaluation and negotiation, enter into a contract with the named Proposer; OR
- b. sustain a meritorious protest(s) and reject the apparent successful Proposer as nonresponsive, if such Proposer is unable to demonstrate that its Proposal complied with all material requirements of the solicitation and Oregon public procurement law; thereafter, County may name a new apparent successful Proposer; OR
- c. reject all Proposals and cancel the procurement.

**2.7 Acceptance of Contractual Requirements:** Failure of the selected Proposer to execute a contract and deliver required insurance certificates within ten (10) calendar days after notification of an award may result in cancellation of the award. This time period may be extended at the option of County.

**2.8 Public Records:** Proposals are deemed confidential until the “Notice of Intent to Award” letter is issued. This RFP and one copy of each original Proposal received in response to it, together with copies of all documents pertaining to the award of a contract, will be kept and made a part of a file or record which will be open to public inspection. If a Proposal contains any information that is considered a **TRADE SECRET** under ORS 192.501(2), **SUCH INFORMATION MUST BE LISTED ON A SEPARATE SHEET CAPABLE OF SEPARATION FROM THE REMAINING PROPOSAL AND MUST BE CLEARLY MARKED WITH THE FOLLOWING LEGEND:**

**“This information constitutes a trade secret under ORS 192.501(2), and shall not be disclosed except in accordance with the Oregon Public Records Law, ORS Chapter 192.”**

The Oregon Public Records Law exempts from disclosure only bona fide trade secrets, and the exemption from disclosure applies only “unless the public interest requires disclosure in the particular instance” ORS 192.500(1). Therefore, non-disclosure of documents, or any portion of a document submitted as part of a Proposal, may depend upon official or judicial determinations made pursuant to the Public Records Law.

**2.9 Investigation of References:** County reserves the right to investigate all references in addition to those supplied references and investigate past performance of any Proposer with respect to its successful performance of similar services, its compliance with specifications and contractual obligations, its completion or delivery of a project on schedule, its lawful payment of subcontractors and workers, and any other factor relevant to this RFP. County may postpone the award or the execution of the contract after the announcement of the apparent successful Proposer in order to complete its investigation.

**2.10 RFP Proposal Preparation Costs and Other Costs:** Proposer costs of developing the Proposal, cost of attendance at an interview (if requested by County), or any other costs are entirely the responsibility of the Proposer, and will not be reimbursed in any manner by County.

**2.11 Clarification and Clarity:** County reserves the right to seek clarification of each Proposal, or to make an award without further discussion of Proposals received. Therefore, it is important that each Proposal be submitted initially in the most complete, clear, and favorable manner possible.

**2.12 Right to Reject Proposals:** County reserves the right to reject any or all Proposals or to withdraw any item from the award, if such rejection or withdrawal would be in the public interest, as determined by County.

**2.13 Cancellation:** County reserves the right to cancel or postpone this RFP at any time or to award no contract.

**2.14 Proposal Terms:** All Proposals, including any price quotations, will be valid and firm through a period of one hundred and eighty (180) calendar days following the Closing date. County may require an extension of this firm offer period. Proposers will be required to agree to the longer time frame in order to be further considered in the procurement process.

**2.15 Oral Presentations:** At County's sole option, Proposers may be required to give an oral presentation of their Proposals to County, a process which would provide an opportunity for the Proposer to clarify or elaborate on the Proposal but will in no material way change Proposer's original Proposal. If the evaluating committee requests presentations, the Procurement Division will schedule the time and location for said presentation. Any costs of participating in such presentations will be borne solely by Proposer and will not be reimbursed by County. **Note:** Oral presentations are at the discretion of the evaluating committee and may not be conducted; therefore, **written Proposals should be complete.**

**2.16 Usage:** It is the intention of County to utilize the services of the successful Proposer(s) to provide services as outlined in the below Scope of Work.

**2.17 Review for Responsiveness:** Upon receipt of all Proposals, the Procurement Division or designee will determine the responsiveness of all Proposals before submitting them to the evaluation committee. If a Proposal is incomplete or non-responsive in significant part or in whole, it will be rejected and will not be submitted to the evaluation committee. County reserves the right to determine if an inadvertent error is solely clerical or is a minor informality which may be waived, and then to determine if an error is grounds for disqualifying a Proposal. The Proposer's contact person identified on the Proposal will be notified, identifying the reason(s) the Proposal is non-responsive. One copy of the Proposal will be archived and all others discarded.

**2.18 RFP Incorporated into Contract:** This RFP will become part of the Contract between County and the selected contractor(s). The contractor(s) will be bound to perform according to the terms of this RFP, their Proposal(s), and the terms of the Sample Contract.

**2.19 Communication Blackout Period:** Except as called for in this RFP, Proposers may not communicate with members of the Evaluation Committee or other County employees or representatives about the RFP during the procurement process until the apparent successful Proposer is selected, and all protests, if any, have been resolved. Communication in violation of this restriction may result in rejection of a Proposer.

**2.20 Prohibition on Commissions and Subcontractors:** County will contract directly with persons/entities capable of performing the requirements of this RFP. Contractors must be represented directly. Participation by brokers or commissioned agents will not be allowed during the Proposal process. Contractor shall not use subcontractors to perform the Work unless specifically pre-authorized in writing to do so by the County. Contractor represents that any employees assigned to perform the Work, and any authorized subcontractors performing the Work, are fully qualified to perform the tasks assigned to them, and shall perform the Work in a competent and professional manner. Contractor shall not be permitted to add on any fee or charge for subcontractor Work. Contractor shall provide, if requested, any documents relating to subcontractor's qualifications to perform required Work.

**2.21 Ownership of Proposals:** All Proposals in response to this RFP are the sole property of County, and subject to the provisions of ORS 192.410-192.505 (Public Records Act).

**2.22 Clerical Errors in Awards:** County reserves the right to correct inaccurate awards resulting from its clerical errors.

**2.23 Rejection of Qualified Proposals:** Proposals may be rejected in whole or in part if they attempt to limit or modify any of the terms, conditions, or specifications of the RFP or the Sample Contract.

**2.24 Collusion:** By responding, the Proposer states that the Proposal is not made in connection with any competing Proposer submitting a separate response to the RFP, and is in all aspects fair and without collusion or fraud. Proposer also certifies that no officer, agent, elected official, or employee of County has a pecuniary interest in this Proposal.

**2.25 Evaluation Committee:** Proposals will be evaluated by a committee consisting of representatives from County and potentially external representatives. County reserves the right to modify the Evaluation Committee make-up in its sole discretion.

**2.26 Commencement of Work:** The contractor shall commence no work until all insurance requirements have been met, the Protest of Awards deadline has been passed, any protest have been decided, a contract has been fully executed, and a Notice to Proceed has been issued by County.

**2.27 Best and Final Offer:** County may request best and final offers from those Proposers determined by County to be reasonably viable for contract award. However, County reserves the right to award a contract on the basis of initial Proposal received. Therefore, each Proposal should contain the Proposer's best terms from a price and technical standpoint. Following evaluation of the best and final offers, County may select for final contract negotiations/execution the offers that are most advantageous to County, considering cost and the evaluation criteria in this RFP.

**2.28 Nondiscrimination:** The successful Proposer agrees that, in performing the work called for by this RFP and in securing and supplying materials, contractor will not discriminate against any person on the basis of race, color, religious creed, political ideas, sex, age, marital status, sexual orientation, gender identity, veteran status, physical or mental handicap, national origin or ancestry, or any other class protected by applicable law.

**2.29 Intergovernmental Cooperative Procurement Statement:** Pursuant to ORS 279A and LCRB, other public agencies shall have the ability to purchase the awarded goods and services from the awarded contractor(s) under terms and conditions of the resultant contract. Any such purchases shall be between the contractor and the participating public agency and shall not impact the contractor's obligation to County. Any estimated purchase volumes listed herein do not include other public agencies and County makes no guarantee as to their participation. Any Proposer, by written notification included with their Proposal, may decline to extend the prices and terms of this solicitation to any and/or all other public agencies. County grants to any and all public serving governmental agencies, authorization to purchase equivalent services or products described herein at the same submitted unit bid price, but only with the consent of the contractor awarded the contract by the County.



## **SECTION 3 SCOPE OF WORK**

### **3.1. INTRODUCTION**

Clackamas County is seeking Proposals from vendors to provide Electronic Plan Review Implementation and Project Management for the following new software programs: Avolve OAS, ProjectDox, and Plans Anywhere.

**Please direct all Technical/Specifications or Procurement Process Questions to the indicated representative referenced in the Notice of Request for Proposals and note the communication restriction outlined in Section 2.19.**

### **3.2 BACKGROUND**

The Clackamas County Department of Transportation and Development (“DTD”) serves as the permitting authority for several cities (by intergovernmental agreement) and the unincorporated areas of Clackamas County, Oregon. In 2017, DTD had more than 300,000 customer interactions and processed more than 32,000 development related permits. Currently, the department relies on paper submittals, which can be challenging with seven internal workgroups that may need to review a permit submittal, and a variety of outside service districts that also need to review and approve the proposal. The current process requires customers to drive to County offices in Oregon City and walk through up to seven work areas before finally submitting their plans for review or picking up permits for approved projects. The customer integrates the process by submitting plans at each work area to initiate the formal plan review process.

### **PROJECT PURPOSE**

DTD has undertaken a strategic initiative to transition to electronic plan reviews and submittals. The goals of this project, known as the ePlan Initiative, are to increase customer productivity and efficiency and reduce redundancy by electronically receiving and routing plan submittals for processing to both internal and external reviewers. The goal is to provide easy-to-use electronic services to our customers, build a secure and reliable business and technical infrastructure to support electronic plan review/submittal services, promote and facilitate culture change from paper processes to electronic processes, and to create an electronic plan review and workflow process to support ongoing operations.

This Request for Proposals is specific to the ePlan Initiative. The overall project goal is to help DTD develop and implement best practices for receiving, handling and routing, reviewing, storing, converting and using electronic documents, including developing and testing these practices before the formal rollout of ePlan, and instilling these practices during the ePlan system design and software launch. This will be accomplished by establishing clear and helpful guidelines for electronic submittals, designing workflows that align with software best practices, configuring the submittal screens for ePlan and leading communications initiatives to establish these practices within DTD work procedures.

### **PROJECT BENEFITS**

At completion of the project, applicants will have a customer-focused online portal for permit application submission, document upload, and ongoing participation in the plans review process. The public can view the tracking, and status of final approved project documents. DTD staff and partner agencies will be able to view and work with the most up-to-date permit documents, even when someone else is viewing the file. The ePlan project will also provide a document review system that fluidly moves plans and documents through the submittal, review, comment and resubmittal facets of development review.

### **3.3. SCOPE OF WORK**

The evaluation of all proposals shall be based upon deriving the “Best Value” for the County. Best Value means achieving an appropriate balance between price and other factors that are key to a particular procurement. A procurement that obtains a low price but does not include other necessary qualities and features of the desired product or service does not meet the Best Value criterion. Factors upon which the proposals will be judged include, but are not limited to, the following:

#### **3.3.1. SCOPE**

**Technologies to be Implemented:** Avolve OAS, ProjectDox, and Plans Anywhere: electronic plans submittal, review and workflow management including a customer portal for receipt of plan submittal documents in an organized workflow for review and management; workflow management for permit signoff; versioning of submittals and modifications; document markup viewer; customer tracking mechanism for file status; ability for external third party agencies to review, comment and approve submittals; and eTools that allow for tracking and submittal of permit submittal documents.

**Project Approach:** The goal of the ePlan Initiative is to help determine the process through which DTD will receive, route, store and use electronic development documents. This will be accomplished by establishing clear and helpful guidelines for electronic filings, identifying workflow needs for future expansion of the system, configuring the workflow for ePlan document review, and configuring the customer access portal for submittals. The outcome will be to transition DTD from paper-based permit submittals and manual processes to electronic records supplied by the customer and consultants that are digitally reviewed and approved. Key activities include:

- Refine, verify and document project ePlan scope;
- Conduct basic business modeling of “as is” process diagrams;
- Conduct in-depth business modeling of “to be” process diagrams with consideration of ePlans software best practices, integration with existing permitting systems, online customer access portals and inspection applications;
- Test the electronic plan submittal and document management changes;
- Refine and create recommendations for an electronic plan review and document management process;
- Coordinate with software vendor and consultants to develop project communications plans;
- Coordinate with software vendor and consultants to develop training and user manual documentation of the process; and
- Final documentation of the change process and employee/customer involvement in the process.

The County will evaluate all complete proposals received by the deadline. Incomplete proposals, late proposals or proposals sent to any other address will not be considered. At the County’s sole discretion, an interview or presentation may be part of the evaluation process.

Clackamas County Department of Transportation & Development is looking for one individual with experience in electronic document management and/or electronic plan review implementation, preferably in a public sector permitting environment. The Electronic Plan Review Implementation Project Manager (ePlan Project Manager) will be expected to serve as the process subject matter expert and will work closely with a core team tasked to collaborate on the implementation of ePlan in Transportation & Development. The ePlan Project Manager will work with the Outreach & Branding consultant and key focus groups to create basic current workflows and assist in the development of new and enhanced workflows, which align with the software best practices, as a result of the replacement of paper files with electronic files. Additional process tasks will be to test the “to be” process, fine tune the process and create a recommendation document. The final deliverables for the ePlans

Project Manager will be the implementation of the approved recommendations and final documentation and training regarding the electronic plan review and document management system.

**Project Teams:** The makeup of the teams will be recommended by the ePlan Project Manager and will include **outside consultants** (Outreach/Branding, Training Documentation, Software Vendor, Accela Permitting System representatives and App Development representatives), **internal service providers** (Technology Services, Public & Government Affairs, and Procurement), **county staff** (Transportation & Development, Water Environment Services), **service districts** (fire, utilities) and **customers** (residential/commercial builders, consultants).

The ePlan Project Manager will report to a Project Team made up of the Deputy Building Codes Administrator (Building Codes), Administrative Services Manager (Department Administration) and Engineering Supervisor (Engineering Development Review).

**Project Leadership:** The Development Review Managers group will serve as the main governing body for the ePlan Initiative. The Development Review Managers group is comprised of supervisors, managers and senior management from the department Land Use & Development line of business. The role of the Development Review Managers group is to provide advice and guidance for implementation of the ePlan Initiative, including:

- Guidance regarding the project plan (project tasks, timeline, rollout plan and budget);
- Decide issues on which project teams cannot reach consensus or have significant operational impact, especially controversial business process decisions regarding consistency of approach;
- Make recommendations on significant technology investments where issues regarding choice exist and are brought to the committee by the project teams;
- Guidance regarding best approaches to, and assistance with, constituent engagement; and
- Champion the ePlan Initiative.

## **REQUIRED TASKS.**

The ePlan Initiative Teams will be acquiring the services of a consultant to fill a position titled Electronic Plan Review Implementation Project Manager (ePlan Project Manager). The activities listed below are key for this role.

### **Electronic Plan Review Implementation Project Manager**

- Coordinate professional contract representatives, software vendor and project teams to keep the project moving forward on schedule;
- Coordinate, create and manage completion of both a basic “as is” and a comprehensive “to be” business process model;
- Create and manage testing and performance of the “to be” model;
- Create recommendation documentation of the findings for the “to be” model.
- Track, manage and control issues, changes, risks and opportunities;
- Coordinate professional contract representatives, software vendor and project teams through implementation of the ePlan software package;
- Collaborate in the final documentation, and coordinate the vendor in developing training materials and owner manuals for the new electronic plan submittal and document management process; and
- Create and manage workflow diagrams (WD); data flow diagrams (DFD), and entity relationship diagrams (ERD).

## **PROJECT DELIVERABLES.**

- Status reports, the frequency of such to be agreed upon by the ePlan project team during project development;
- Analysis documentation, as determined in consultation with project leadership;
- Design documentation, as determined in consultation with project leadership;
- Test plan, as determined in consultation with project leadership and outside vendor; and
- Pilot document management system as defined by “to be” process model in consultation with project leadership.

## **SKILLS AND EXPERIENCE.**

### **Required Skills**

- Previous experience in performing similar work. Demonstration of ability to meet required and desired skills;
- Exceptional electronic plan submittal and document management experience; preferably in a public sector permitting environment;
  - Must have successfully performed at least one contract providing comparable consulting services with a public sector agency of similar size and complexity to Clackamas County,
  - Must have managed at least one software implementation project of similar scope and complexity within the last five years;
- Excellent interpersonal skills and the ability to build and maintain effective working relationships with other members of the ePlan team;
- Ability to adapt to changes in course while maintaining productivity;
- Strong customer relations skills; and
- Excellent oral and written communication skills and problem-solving ability.

### **Desired Skills**

- Knowledge of existing applications; the Accela permitting system, Avolve OAS, ProjectDox and Plans Anywhere systems.
- The ePlan Project Manager has successfully performed at least one implementation project that involved integrating the proposed software, or similar software, with existing platforms within the last five years; and
- Ability to achieve objectives using an iterative approach where the end-state is defined as a result of the project execution – in other words, the end-state will not be completely defined in every detail before the initiation of the project.

Proposals will be evaluated for fit with the skills and experience needed. Top scoring candidates may be contacted for interviews. Evaluation criteria is stated in Section 4, proposers are encouraged to demonstrate thoroughness, quality, specificity, robustness, and flexibility of Project Manager’s approach/ methodology. No initial limits are placed on the number of candidates who will be selected for interviewing. Candidate selection decisions (including interviews) will be made by a team consisting of one or more managers from the County.

### **3.3.2. Work Schedule:**

**Project start date is approximately October, 2018.**

The following scope deliverables will be discussed and scheduled upon contract award:

- Further define and clarify ePlan scope;
- Conduct basic “as is” model;
- Conduct in-depth “to be” model;

- Test plan of the “to be” model;
- Analysis Documentation of test;
- Design Documentation;
- Final Documentation including training for staff; and
- Status reports, the frequency of such to be agreed upon by the ePlan project team during project development.

**3.3.3. Term of Contract:**

The term of the contract shall be from the effective date through **June 30, 2021**, with the option for a one (1) year renewal thereafter subject to the mutual agreement of the parties.

**3.3.4 Sample Contract:** Submission of a Proposal in response to this RFP indicates Proposer’s willingness to enter into a contract containing substantially the same terms (including insurance requirements) of the sample contract identified below. No action or response to the sample contract is required under this RFP. Any objections to the sample contract terms should be raised in accordance with Paragraphs 2.2 or 2.3 of this RFP, pertaining to requests for clarification or change or protest of the RFP/specifications, and as otherwise provided for in this RFP. This RFP and all supplemental information in response to this RFP will be a binding part of the final contract.

The applicable Sample **Professional Services Contract** for this RFP can be found at <http://www.clackamas.us/bids/terms.html>.

The following paragraphs of the Professional Services Contract will be applicable:

- Article I, Paragraph 4 – Travel and Other Expense is Authorized
- Article II, Paragraph 29 – Confidentiality
- Article II, Paragraph 29 – Criminal Background Check Requirements
- Article II, Paragraph 30 – Key Persons
- Exhibit A – On-Call Provision

The following insurance requirements will be applicable:

- Professional Liability: combined single limit, or the equivalent, of not less than \$1,000,000 per occurrence, with an annual aggregate limit of \$2,000,000 for damages caused by error, omission or negligent acts.
- Commercial General Liability: combined single limit, or the equivalent, of not less than \$1,000,000 per occurrence, with an annual aggregate limit of \$2,000,000 for Bodily Injury and Property Damage.
- Automobile Liability: combined single limit, or the equivalent, of not less than \$500,000 per occurrence for Bodily Injury and Property Damage.

## SECTION 4 EVALUATION PROCEDURE

- 4.1** An evaluation committee will review all Proposals that are initial deemed responsive and they shall rank the Proposals in accordance with the below criteria. The evaluation committee may recommend an award based solely on the written responses or may request Proposal interviews/presentations. Interviews/presentations, if deemed beneficial by the evaluation committee, will consist of the highest scoring Proposers. The invited Proposers will be notified of the time, place, and format of the interview/presentation. Based on the interview/presentation, the evaluation committee may revise their scoring.

Written Proposals must be complete and no additions, deletions, or substitutions will be permitted during the interview/presentation (if any). The evaluation committee will recommend award of a contract to the final County decision maker based on the highest scoring Proposal. The County decision maker reserves the right to accept the recommendation, award to a different Proposer, or reject all Proposals and cancel the RFP.

Proposers are not permitted to directly communicate with any member of the evaluation committee during the evaluation process. All communication will be facilitated through the Procurement representative.

**4.2 Evaluation Criteria**

<u>Category</u>	<u>Points available:</u>
Proposer's General Background and Qualifications	0-40
Proposers Approach	0-30
Fees	0-20
References	0-10
<b>Available points</b>	<b>0-100</b>

- 4.3** Once a selection has been made, the County will enter into contract negotiations. During negotiation, the County may require any additional information it deems necessary to clarify the approach and understanding of the requested services. Any changes agreed upon during contract negotiations will become part of the final contract. The negotiations will identify a level of work and associated fee that best represents the efforts required. If the County is unable to come to terms with the highest scoring Proposer, discussions shall be terminated and negotiations will begin with the next highest scoring Proposer. If the resulting contract contemplates multiple phases and the County deems it is in its interest to not authorize any particular phase, it reserves the right to return to this solicitation and commence negotiations with the next highest ranked Proposer to complete the remaining phases.

## SECTION 5 PROPOSAL CONTENTS

### 5.1. Vendors must observe submission instructions and be advised as follows:

**5.1.1.** Complete Proposals may be mailed to the below address or emailed to [Procurement@clackamas.us](mailto:Procurement@clackamas.us). The subject line of the email must identify the RFP title. Proposers are encouraged to contact Procurement to confirm receipt of the Proposal. If the Proposal is mailed, an original copy and an electronic copy (on compact disk or jump drive) must be included. The Proposal (hardcopy or email) must be received by the Closing Date and time indicated in Section 1 of the RFP.

### 5.1.2. Mailing address including Hand Delivery, UPS and FEDEX:

Clackamas County Procurement Division – Attention George Marlton, Director  
Clackamas County Public Services Building  
2051 Kaen Road  
Oregon City, OR 97045

**5.1.3.** County reserves the right to solicit additional information or Proposal clarification from the vendors, or any one vendor, should the County deem such information necessary.

### **Provide the following information in the order in which it appears below:**

#### 5.2.1. Proposer's General Background and Qualifications: (0-40 Points)

- Overview that reflects understanding of the efforts described in this Request for Proposal;
- Resume with clear credentials demonstrating experience that aligns with the required and desired skills in section 3.3.1;
- Area(s) of expertise;
- Description of providing similar services to public entities of similar size within the past five (5) years;
- Description of proposer's ability to meet the requirements in Section 3; and
- Description of what distinguishes this proposer from other proposers performing a similar service.

#### 5.2.2 Proposer's Approach: (0-30 Points)

##### **Implementation**

1. Describe your experience working with Avolve OAS, ProjectDox ePlan and/or Plans Anywhere solutions, or similar products.
2. Describe your experience managing the integration of SaaS and OnPremise software solutions. What were your lessons learned? How would you use that experience to tailor your approach to this project?
3. Have you ever successfully implemented a software solution within a union environment? How does this differ from implementation in the non-union environment? What additional considerations need to be factored in to your approach, if any?

##### **Project Approach**

4. Tell us about your change management philosophy. What has worked best in your experience? How will you apply this experience to build consensus when approaching this project?
5. If you are awarded this contract, give us your plan for your first 30 days, and an overview of how you plan to approach the project?

6. Is ease of use important, or do you believe it is more important to accommodate the desired functionality?
7. Tell us about a successful project that required you to coordinate and manage multiple vendors/consultants/departments and agencies, and also integrate with outside customers. Why do you believe it was successful? , what was your role in the final outcome?

### **Project Deliverables**

Provide example work products that demonstrate compliance with the requested project deliverables outlined in Section 3.3.1.

#### **5.4. Fees: (0-20 Points)**

Fees should be on a time and material with a not to exceed fee basis. Fees should be sufficiently descriptive to facilitate acceptance of a Proposal. List the not-to-exceed amount you propose for the service. Fees and fee schedules should outline all estimated expenses, hourly rate, anticipated travel, other reimbursable expenses.

#### **5.5. References: (0-10 Points)**

Provide three (3) references from clients and/or agencies you have served similar to the County in the past three (3) years, including one you have done business with in the past thirty-six (36) months and one (1) long-term. Provide the name, address, email, and phone number of the references.

#### **5.6. Completed Proposal Certification (see the below form)**



**PROPOSAL CERTIFICATION**  
**2018-42 ELECTRONIC PLAN REVIEW PROJECT MANAGER**

Submitted by: \_\_\_\_\_  
(Must be entity's full legal name, and State of Formation)

The undersigned, through the formal submittal of this Proposal response, declares that he/she has examined all related documents and read the instruction and conditions, and hereby proposes to provide the services as specified in accordance with the RFP, for the price set forth in the Proposal documents.

Proposer, by signature below, hereby represents as follows:

- (a) That no County elected official, officer, agent or employee of the County is personally interested directly or indirectly in this contract or the compensation to be paid hereunder, and that no representation, statement or statements, oral or in writing, of the County, its elected officials, officers, agents, or employees had induced it to enter into this contract and the papers made a part hereof by its terms;
- (b) The Proposer, and each person signing on behalf of any Proposer certifies, in the case of a joint Proposal, each party thereto, certifies as to its own organization, under penalty of perjury, that to the best of their knowledge and belief:
  - 1. The prices in the Proposal have been arrived at independently, without collusion, consultation, communication, or agreement for the purpose of restraining competition as to any matter relating to such prices with any other Proposer or with any competitor;
  - 2. Unless otherwise required by law, the prices which have been quoted in the Proposal have not been knowingly disclosed by the Proposer prior to the Proposal deadline, either directly or indirectly, to any other Proposer or competitor;
  - 3. No attempt has been made nor will be made by the Proposer to induce any other person, partnership or corporation to submit or not to submit a Proposal for the purpose of restraining trade;
- (c) The Proposer fully understands and submits its Proposal with the specific knowledge that:
  - 1. The selected Proposal must be approved by the Board of Commissioners.
  - 2. This offer to provide services will remain in effect at the prices proposed for a period of not less than ninety (90) calendar days from the date that Proposals are due, and that this offer may not be withdrawn or modified during that time.
- (d) That this Proposal is made without connection with any person, firm or corporation making a bid for the same material, and is in all respects, fair and without collusion or fraud.
- (e) That the Proposer shall use recyclable products to the maximum extent economically feasible in the performance of the contract work set forth in this document.
- (f) That the Proposer accepts all terms and conditions contained in this RFP and that the RFP and the Proposal, and any modifications, will be made part of the contract documents. It is understood that all Proposals will become part of the public file on this matter. The County reserves the right to reject any or all Proposals.
- (g) That the Proposer holds current licenses that businesses or services professionals operating in this state must hold in order to undertake or perform the work specified in these contract documents.
- (h) That the Proposer is covered by liability insurance and other insurance in the amount(s) required by the solicitation and in addition that the Proposer qualifies as a carrier insured employer or a self-insured employer under ORS 656.407 or has elected coverage under ORS 656.128.
- (i) That the Proposer is legally qualified to contract with the County.
- (j) That the Proposer has not and will not discriminate in its employment practices with regard to race, creed, age, religious affiliation, sex, disability, sexual orientation, gender identity, national origin, or any other protected class. Nor has Proposer or will Proposer discriminate against a subcontractor in the awarding of a subcontract because the subcontractor is a disadvantaged business enterprise, a minority-owned business, a woman-owned business, a business that a service-disabled veteran owns or an emerging small business that is certified under ORS 200.055.

**(k)** The Proposer agrees to accept as full payment for the services specified herein, the amount as shown in the Proposal.

Resident Bidder, as defined in ORS 279A.120

Non-Resident Proposer, Resident State \_\_\_\_\_  
Oregon Business Registry Number \_\_\_\_\_

Contractor's Authorized Representative:

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Firm: \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_ Phone: (    ) \_\_\_\_\_

e-mail: \_\_\_\_\_ Fax: \_\_\_\_\_

Contract Manager:

Name \_\_\_\_\_ Title: \_\_\_\_\_

Phone number: \_\_\_\_\_

Email Address: \_\_\_\_\_