



Procurement Division
Public Services Building
2051 Kaen Road
Oregon City, OR 97045
(503) 742-5444 (Office)

REQUEST FOR QUOTES (RFQ) #2017-99

Issue Date: October 26, 2017

Project Name:	Clackamas County Public Information Plan		
Quote Due Date/Time:	November 15, 2017, 2:00 PM		
Procurement Analyst:	Patricia Bride	Phone:	(503) 742-5447
		Email:	pbride@clackamas.us

**SUBMIT QUOTES VIA EMAIL TO PROCUREMENT@CLACKAMAS.US
OR MAIL/HAND DELIVERY TO THE ABOVE ADDRESS**

**PLEASE NOTE: EMAIL SUBMISSIONS SHOULD HAVE
“CLACKAMAS COUNTY PUBLIC INFORMATION PLAN” IN THE SUBJECT LINE**

1. ANNOUNCEMENT AND SPECIAL INFORMATION

Quoters are required to read, understand, and comply with all information contained within this Request for Quotes (“RFQ”). All quotes are binding upon Quoter for sixty (60) days from the Quote Due Date/Time. Quotes received after the Quote Due Date/Time may not be considered. If authorized in the RFQ and resulting contract, travel and other expense reimbursement will only be reimbursed in accordance with the Clackamas County Travel Reimbursement Policy in effect at the time the expense is incurred. The Policy may be found at www.clackamas.us/bids/terms.html.

It will be the responsibility of potential Quoters to refer daily to the Bids and Contract Information Page (www.clackamas.us/bids/index.html) to check for any available addenda, response to clarifying questions, cancellations or other information pertaining to this RFQ.

All questions regarding this RFQ are to be directed to the Procurement Analyst named above. Quoters may not communicate with County employees or representatives about the RFQ during the procurement process until the Procurement office has notified Quoters of the selected Quoter. Communication in violation of this restriction may result in rejection of a Quoter.

2. SCOPE

The purpose of this RFQ is to retain an experienced firm, individual, team, or consultant to assist in the development of a comprehensive and standardized process for managing public information and communications during a major emergency, disaster, or planned event incident to include response and recovery operations. See the full Scope of Work outlined in Attachment A – Scope of Work, attached and hereby incorporated by reference. The County would like to start services as soon as a contract may be finalized. The County has been awarded a grant by the Oregon Military Department Office of Emergency Management Homeland Security Grant Program State Homeland Security Program of \$50,000.00 for the overall project; however, the funding should not be construed by quoters as the default fee proposal. The County endeavors to obtain the best value it can for the quality and quantity of the work to be provided under the resulting contract.

3. Sample Contract

Submission of a Quote in response to this RFQ indicates Quoter’s willingness to enter into a contract containing substantially the same terms of the below referenced contract, which can be found at: <http://www.clackamas.us/bids/terms.html>, with the below indicated requirements. No action or response to the sample contract is required under this RFQ. The applicable sample contract is the:

Professional Services Contract (unless checked, item does not apply)

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.

Additional Contract Provisions Required:

Federal Funded Projects. The undersigned hereby certifies that it and all subcontractors will comply with (i) all Federal statutes relating nondiscrimination, including, but not limited to: Title VI of the Civil Rights Act of 1964 (P.L. 88-352) which prohibits discrimination on the basis race, color or national origin; Title IX of the Education Amendments of 1972, as amended (20 U.S.C. §§1681 et seq.), which prohibits discrimination on the basis of sex; the Age Discrimination Act of 1975, as amended (29 U.S.C. §§6101 et seq.), which prohibits discrimination on the basis of age; the Rehabilitation Act of 1973, as amended (29 U.S.C. §§793 et seq.), which prohibits discrimination against requires affirmative action for qualified individuals with disabilities; the Drug Abuse Office and Treatment Act of 1972 (P.L. 92-255), as amended, relating to nondiscrimination on the basis of drug abuse; the Comprehensive Alcohol Abuse and Alcoholism Prevention, Treatment and Rehabilitation Act of 1970 (42 U.S.C. §§4541 et seq.), as amended, relating to nondiscrimination on the basis of alcohol abuse or alcoholism; §§523 and 527 of the Public Health Service Act of 1912 (42 U.S.C. §§290 dd-3 and 290 ee-3), as amended, relating to confidentiality of alcohol and drug abuse patient records; Title VII of the Civil Rights Act of 1969 (42 U.S.C. §§3601 et seq.), as amended, relating to nondiscrimination in the sale, rental or financing of housing; any other discrimination provisions in the specific statute(s) under which for Federal assistance is being made; and the requirements of any other nondiscrimination statute(s) which may apply; (ii) will comply with the Byrd Anti-Lobbying Amendment (31 U.S.C. 1352 et. seq.), and shall file the required certification if the award is \$100,000 or more; and (iii) will comply with the provisions of the Hatch Act (5 U.S.C. §§1501-1508 and 7324-7328) which limit the political activities of employees whose principal employment activities are funded in whole or in part with Federal funds.

Must be registered with the Federal System for Award Management and may not be disbarred from contracts from either the Federal Government or the State of Oregon.

4. Quote

Quotes should be short and concise with the following information:

- A. Describe your understanding of the project.
- B. How will you approach and complete this project?
 - a. Describe the proposed work activities and provide a narrative description of how the firm proposes to conduct and complete each task.
 - b. Describe the proposed work products that will result from each task.
- C. What is your past experience with projects similar to this?
- D. What is your experience related to disaster/emergency management public information and communications?
- E. Provide a minimum of two sample statements of work from past similar projects.
- F. Provide a detailed line item budget. The 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. All travel-related costs (if applicable) included in the estimated cost shall be separately identified.

G. References;

H. Estimated time to complete the project; and

I. Any additional information that Clackamas County should take into consideration for the project or qualifications.

5. Evaluation

Quotes will be evaluated based on subjective factors including, but not limited to: Firm experience, staff experience, not-to-exceed price for the project, references, and proposal (including timeline).

ATTACHMENT A SCOPE OF WORK

Background.

Clackamas County developed a Joint Information System (“JIS”) Plan in 2011 intended to provide guidance and reference material for public information staff in the County’s Emergency Operations Center (“EOC”). The public information function of the EOC is staffed by employees from the County’s Public and Government Affairs (“PGA”) Department.

Most PGA staffers serve in Public Information Officer (“PIO”) roles on a day-to-day basis but they do not have consistent experience in emergency response communications and need a reference document that provides clear guidance on how to properly set up and carry out the public information function during a countywide incident.

Following the completion of the JIS plan in 2011, public information staff exercised the plan and found it to be insufficient in meeting their needs to effectively set up and operate a countywide public information function.

They also attempted to use the plan in real incidents and found it to be lacking in several key areas such as:

1. Outlining setup procedures for the physical space where the public information function is housed in the EOC.
2. Establishing social media policies and procedures,
3. Developing pre-scripted messages, and infographics for a variety of anticipated scenarios,
4. Establishing thresholds and protocols, for when/how to set up a Joint Information Center (“JIC”), among other areas.

Most recently, the need for an improved and more comprehensive public information plan was noted in several exercises and in real world after action reports. Additionally, other work is being done in the County which places demands on the public information function for incidents. The County is currently finalizing its Disaster Debris Management Plan and has identified a gap of having pre-scripted messages and infographics for the management of debris post-disaster.

The Clackamas County Homeland Security Task Force provides consultation on emergency management development for the County and recently agreed that Clackamas County should take a leadership role in developing a public information plan that can be adapted for use by any County jurisdiction. The current plan is only written for the Clackamas County EOC public information function and is not useable by stakeholder jurisdictions, without major adaptation.

Clackamas County staffers have made minor edits to the JIS Plan; however, they lack the time capacity and technical expertise to update the plan to address the identified gaps. For this reason, Clackamas County Disaster Management (“CCDM”) applied for and received grant funding to hire a contractor to update the plan via a series of stakeholder meetings. Hiring a contractor will fill the gap of having a deficient Public Information Plan by dedicating a subject matter expert firm’s resources to developing a functional plan.

Hiring a contractor to update the plan will allow the county to bring the appropriate expertise and background and knowledge to the table, resulting in a plan that is functional, current and meets the county’s emergency communications needs. In addition, hiring a contractor will ensure that all stakeholder needs are met and incorporated into the plan.

Scope of Work.

Clackamas County Disaster Management is seeking quotes from individuals, firms, teams or consultants with demonstrated experience in public information planning for major emergencies and disasters. The successful Quoter would be expected to provide the following services:

Conduct a multi-agency and multi-jurisdictional public information/communications planning project that will create a comprehensive and standardized process for managing public information/communications that support major emergency/disaster/planned event, hereafter called “Incident(s),” response and recovery operations.

This will involve facilitation of a Project Team comprised of public information officers/specialists, emergency managers and other stakeholders to develop an efficient and effective method for managing public information/communications during all phases of an incident.

This project will result in a Public Information Plan document that contains plans, procedures, forms and other tools that will be used in emergency operations centers, department operations centers, joint information centers and by other agencies involved in emergency/disaster management.

Currently, agencies within Clackamas County frequently operate autonomously when developing public information/communications plans in support of major incidents. Public messaging and communications are often shared without coordination with partner agencies, resulting in duplicate and inconsistent messaging and public confusion. The goal of this project is to develop plans and procedures that allow all Clackamas County public and private agencies to work collaboratively to ensure strategic, consistent information is developed, vetted and delivered to the community in a coordinated fashion.

This project will involve both the assessment and capturing of current, effective public information/communications practices in Clackamas County as well as the development or improvement of new or existing plans and procedures.

The successful Quoter shall perform the tasks listed below and shall work closely with the project managers, project team, and other designated stakeholders to accomplish the following project goals:

1. Develop and finalize a detailed project management plan. This will include major tasks, subtasks, timeline, deliverables schedule and work assignments.
2. Assess the current status of public information communications plans and procedures in Clackamas County. This will involve gathering information from, at a minimum, each of the major disciplines represented on the Clackamas County PIO Network. The project team will select the agencies to participate. For each organization, assess current procedures, identify strengths and weaknesses, and identify best practices and gaps. Assessment may be done using interviews and meetings, either in-person or via audio or video conference. Collect and assess current plans, procedures, forms, and other necessary tools that support the public information communication process and that may inform later tasks. Surveys may be used but should augment a hands-on review of plans and procedures and should not be used exclusively.
3. Prepare a Clackamas County Public Information Communications Assessment that summarizes observations and findings and identifies common needs and gaps in public information communication plans and procedures.
4. Conduct the first project team meeting. At a minimum, this will include:
 - a. Project overview and orientation to the project management plan.
 - b. Summary of the assessment of public information communications procedures in Clackamas County.
5. Facilitate a series of at least three (3) multi-agency workshops dedicated to the development of Clackamas County Public Information plans and procedures. In each workshop, Quoter will work with stakeholders to determine workable plans and procedures to inform a coordinated and complete Clackamas County Public Information Plan. Quoter, with project team, will gain consensus from stakeholders in mutually agreed upon procedures.

6. Capture the results of the workshops in the form of draft procedures or comparable document and provide an opportunity for review and comment to stakeholders. Incorporate comments as appropriate.
7. Develop a Clackamas County Public Information Plan that compiles procedures, forms, and other necessary tools that will aid in the implementation of the agreed upon Public Information Plan. Submit plan to project team for final review and comment.
8. Develop a final, master copy of the plan that incorporates consensus feedback on the final draft.

Deliverables.

Deliverables shall be considered the tangible work products that are to be delivered to the County such as reports, draft documents, data, interim findings, and meeting presentations.

Administrative and recurring deliverables will include:

1. A record of all meetings and interviews (including the date, location, attendees/participants, and a summary of each meeting and interview);
2. Monthly project progress reports.

Project Deliverables include the following:

1. Project Management Plan
2. Clackamas County Public Information Communications Capability Assessment
3. Clackamas County Public Information Communications Workshops and Draft Procedures
4. Draft Clackamas County Public Information Plan
5. Final Clackamas County Public Information Plan

The Project Management Plan will be reviewed and approved by the project manager. For other project deliverables, before the project manager will accept each deliverable as complete, the project team will have an opportunity to review and comment on the deliverable and their comments will be incorporated as appropriate.

The primary deliverable for this project is the “Clackamas County Public Information Plan” that provides complete instructions for the conduct of a standardized, multi-agency public information strategy and operating procedure. The Quoter is asked to make the plan as concise as possible, eliminating excess and unnecessary language. The plan may consist of the following items:

1. Purpose
2. Introduction
3. Situation and Assumptions
4. List of all known Clackamas County Public Information Officers
5. Concept of Operations
 - a. Joint information system activation thresholds
 - b. Joint information system definition, scope, and concept of operations
 - c. EOC Activation Levels
 - d. EOC/Joint Information Center/Media Briefing Locations
 - e. Public Inquiry Center/Public Information Interface
 - f. Public Information Center staffing
 - g. Public Information Center Policies and Procedures
6. Pre-approved, pre-scripted hazard-specific public information products
 - a. Debris Management
 - b. Earthquakes
 - c. Extreme heat
 - d. Floods
 - e. Emergency wound care after a disaster
 - f. Power outage

- g. Food and water
- h. Cleanup
- i. Coping with disasters
- j. Wildfire
- k. Winter weather
- 7. Communication Strategy
 - a. Social media
 - b. Press releases
 - c. Press conferences/news briefings
- 8. Strategy for how all Clackamas County PIO's will work together to develop, vet, and share common messages during a major emergency or disaster.
- 9. Based on stakeholders input and feedback, develop Public Information Unit (single agency) operating guidelines to include:
 - a. Organizational chart
 - b. Position checklists
 - c. Physical space activation guide, to include space setup diagram and instructions.
- 10. Recommended training standards

All content in plan must be accessible as defined by Americans with Disabilities Act standards.

Note: the plan must prominently contain the following statement: "This document was prepared under a grant from FEMA's Grant Programs Directorate, U.S. Department of Homeland Security. Points of view or opinions expressed in this document are those of the authors and do not necessarily represent the official position or policies of FEMA's Grant."

Five (5) meetings with the project team are currently contemplated. If, in the opinion of the Quoter, additional meetings, site visits, or other in-person activities will be required, the Quoter should incorporate those activities in the costs in its proposal. If it becomes necessary to conduct additional in-person activities during the course of this project, the project manager will work with the Quoter to adjust the budget, deliverables, or other services to accommodate the increased demands.

All deliverables and resulting work products from the contract will become the property of Clackamas County. As such, the Quoter and any Quoter third party contractors grant the County and its stakeholders the right to copy and distribute (in any and all media and formats) project deliverables for regulatory, project certification/recognition, program development, public education, and/or for any purposes at the sole discretion of Clackamas County.

CLACKAMAS COUNTY CERTIFICATIONS
RFQ #2017-99

Each Quoter must read, complete and submit a copy of this Clackamas County Certification with their Quote. Failure to do so may result in rejection of Quote. By signature on this Certification the undersigned certifies that they are authorized to act on behalf of the Quoter and that under penalty of perjury the undersigned will comply with the following:

SECTION I. OREGON TAX LAWS

As required in ORS 279B.110(2)(3), the undersigned hereby certifies that, to the best of the undersigned's knowledge, the Quoter is not in violation of any Oregon Tax Laws. For purposes of this certification, "Oregon Tax Laws" means a state tax imposed by ORS 320.005 to 320.150 and 403.200 to 403.250 and ORS chapters 118, 314, 316, 317, 318, 321, 323, and elderly rental assistance program under ORS 310.630 to 310.706, and local taxes administered by the Department of Revenue under ORS 305.620, all as applicable. If a contract is executed, this information will be reported to the Internal Revenue Service. Information not matching IRS records could subject Quoter to 28% backup withholding.

SECTION II. NON-DISCRIMINATION

The undersigned hereby certifies that the Quoter has not and will not discriminate in its employment practices with regard to race, creed, age, religious affiliation, sex, disability, sexual orientation, national origin, or any other protected class. Nor has Quoter or will Quoter 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 emergency small business that is certified under ORS 200.055.

SECTION III. CONFLICT OF INTEREST

The undersigned hereby certifies that no elected official, officer, agency or employee of Clackamas County is personally interested, directly or indirectly, in any resulting contract from this RFQ, or the compensation to be paid under such contract, and that no representation, statements (oral or in writing), of the County, its Commissioners, officers, agents, or employees had induced Quoter to submit this Quote. In addition, the undersigned hereby certifies that this proposal is made without connection with any person, firm, or corporation submitting a quote for the same material, and is in all respects fair and without collusion or fraud.

SECTION IV. COMPLIANCE WITH SOLICITATION

The undersigned further agrees and certifies that they:

1. Have read, understand and agree to be bound by and comply with all requirements, instructions, specifications, terms and conditions of the RFQ (including any attachments); and
2. Are an authorized representative of the Quoter, that the information provided is true and accurate, and that providing incorrect or incomplete information may be cause for rejection of the Quote or contract termination; and
3. Will furnish the designated item(s) and/or service(s) in accordance with the RFQ and Quote; and
4. Will use recyclable products to the maximum extent economically feasible in the performance of the contract work set forth in this RFQ.

Firm Name: _____ Date: _____

Signature: _____ Title: _____

Name: _____ Telephone: _____

Email: _____ OR CCB # (if applicable): _____

Business Designation (check one):

☐ Corporation ☐ Partnership ☐ Sole Proprietorship ☐ Non-Profit ☐ Limited Liability Company

☐ Resident Quoter, as defined in ORS 279A.120

☐ Non-Resident Quote. Resident State: _____

Oregon Business Registry Number: _____

CLACKAMAS COUNTY INSTRUCTIONS TO QUOTERS

Quotes are subject to the applicable provisions and requirements of the Clackamas County Local Contract Review Board Rule C-047-0270 (Intermediate Procurements) and Oregon Revised Statutes.

QUOTE PREPARATION

1. **QUOTE FORMAT:** Quotes must be submitted as indicated in the RFQ. Quotes may be submitted in writing to Clackamas County via e-mail, mail or in person.
2. **CONFORMANCE TO RFQ REQUIREMENTS:** Quotes must conform to the requirements of the RFQ. Unless otherwise specified, all items quoted are to be new, unused and not remanufactured in any way. Any requested attachments must be submitted with the quote and in the required format. Quote prices must be for the unit indicated on the quote. Failure to comply with all requirements may result in quote rejection.
3. **ADDENDA:** Only documents issued as addenda by Clackamas County serve to change the RFQ in any way. No other directions received by the Quoter, written or verbal, serve to change the RFQ document. NOTE: IF YOU HAVE RECEIVED A COPY OF THE RFQ, YOU SHOULD CONSULT THE CLACKAMAS COUNTY BIDS AND CONTRACT INFORMATION WEBSITE (www.clackamas.us/bids/index.html) TO ENSURE THAT YOU HAVE NOT MISSED ANY ADDENDA OR ANNOUNCEMENTS. QUOTERS ARE NOT REQUIRED TO RETURN ADDENDUMS WITH THEIR QUOTE. HOWEVER, QUOTERS ARE RESPONSIBLE TO MAKE THEMSELVES AWARE OF, OBTAIN AND INCORPORATE ANY CHANGES MADE IN ANY ADDENDA ISSUED, AND TO INCORPORATE ANY CHANGES MADE BY ADDENDUM INTO THEIR FINAL QUOTE. FAILURE TO DO SO MAY, IN EFFECT, MAKE THE QUOTER'S QUOTE NON-RESPONSIVE, WHICH MAY CAUSE THE QUOTE TO BE REJECTED.
4. **USE of BRAND or TRADE NAMES:** Any brand or trade names used by Clackamas County in the specifications are for the purpose of describing and establishing the standard of quality, performance and characteristics desired and are not intended to limit or restrict competition. Quoters may submit quotes for substantially equivalent products to those designated unless the RFQ provides that a specific brand is necessary because of compatibility requirements, etc. All such brand substitutions shall be subject to approval by Clackamas County.
5. **PRODUCT IDENTIFICATION:** Quoters must clearly identify all products quoted. Brand name and model or number must be shown. Clackamas County reserves the right to reject any quote when the product information submitted with the quote is incomplete.
6. **FOB DESTINATION:** Unless specifically allowed in the RFQ, ***QUOTE PRICE MUST BE F.O.B. DESTINATION with all transportation and handling charges included in the Quote.***
7. **DELIVERY:** Delivery time must be shown in number of calendar days after receipt of purchase order.
8. **EXCEPTIONS:** Any deviation from quote specifications, or the form of sample contract referenced in this RFQ, may result in quote rejection at County's sole discretion.
9. **SIGNATURE ON QUOTE:** Quotes must be signed by an authorized representative of the Quoter. Signature on a quote certifies that the quote is made without connection with any person, firm or corporation making a quote for the same goods and/or services and is in all respects fair and without collusion or fraud. Signature on a quote also certifies that the Quoter has read and fully understands all quote specifications, and the sample contract referenced in this RFQ (including insurance requirements). No consideration will be given to any claim resulting from quoting without comprehending all requirements of the RFQ.
10. **QUOTE MODIFICATION:** Quotes, once submitted, may be modified in writing before the time and date set for quote closing. Any modifications should be signed by an authorized representative, and state that the new document supersedes or modifies the prior quote. Quoters may not modify quotes after quote closing time.
11. **QUOTE WITHDRAWALS:** Quotes may be withdrawn by request in writing signed by an authorized representative and received by Clackamas County prior to the Quote Due Date/Time. Quotes may also be withdrawn in person before the Quote Due Date/Time upon presentation of appropriate identification.

- 12. QUOTE SUBMISSION:** Quotes may be submitted by returning to Clackamas County Procurement Division in the location designated in the introduction of the RFQ via email, mail or in person; however, no oral or telephone quotes will be accepted. Envelopes, or e-mails containing Quotes should contain the RFQ Number and RFQ Title.

QUOTE EVALUATION AND AWARD

- 1. PRIOR ACCEPTANCE OF DEFECTIVE PROPOSALS:** Due to limited resources, Clackamas County generally will not completely review or analyze quotes which fail to comply with the requirements of the RFQ or which clearly are not the best quotes, nor will Clackamas County generally investigate the references or qualifications of those who submit such quotes. Therefore, neither the return of a quote, nor acknowledgment that the selection is complete shall operate as a representation by Clackamas County that an unsuccessful quote was complete, sufficient, or lawful in any respect.
- 2. DELIVERY:** Significant delays in delivery may be considered in determining award if early delivery is required.
- 3. CASH DISCOUNTS:** Cash discounts will not be considered for award purposes unless stated in the RFQ.
- 4. PAYMENT:** Quotes which require payment in less than 30 days after receipt of invoice or delivery of goods, whichever is later, may be rejected.
- 5. INVESTIGATION OF REFERENCES:** Clackamas County reserves the right to investigate references and or the past performance of any Quoter with respect to its successful performance of similar services, compliance with specifications and contractual obligations, and its lawful payment of suppliers, sub-contractors, and workers. Clackamas County may postpone the award or execution of the contract after the announcement of the apparent successful Quoter in order to complete its investigation. Clackamas County reserves the right to reject any quote or to reject all quotes at any time prior to Clackamas County's execution of a contract if it is determined to be in the best interest of Clackamas County to do so.
- 6. METHOD OF AWARD:** Clackamas County reserves the right to make the award by item, groups of items or entire quote, whichever is in the best interest of Clackamas County.
- 7. QUOTE REJECTION:** Clackamas County reserves the right to reject any and all quotes.
- 8. QUOTE RESULTS:** Quoters who submit a quote will be notified of the RFQ results. Awarded quote files are public records and available for review by submitting a public records request or by appointment.