



**REQUEST FOR PROPOSALS #2019-11**

**FOR**

**Electronic Plans Review Change Management Services**

**BOARD OF COUNTY COMMISSIONERS**

**JIM BERNARD, Chair**

**SONYA FISCHER, Commissioner**

**KEN HUMBERSTON, Commissioner**

**PAUL SAVAS, Commissioner**

**MARTHA SCHRADER, Commissioner**

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**Gary Schmidt  
County Administrator**

**George Marlton  
Procurement Division Director**

**Ryan Rice  
Analyst**

**PROPOSAL CLOSING DATE, TIME AND LOCATION**

**DATE: April 10, 2019**

**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.....	March 13, 2019
Protest of Specifications Deadline.....	March 20, 2019, 5:00 PM, Pacific Time
Deadline to Submit Clarifying Questions.....	April 3, 2019, 5:00 PM, Pacific Time
Request for Proposals Closing Date and Time.....	April 10, 2019, 2:00 PM, Pacific Time
Interviews of Top Proposers (Estimated).....	Week of April 22, 2019
Deadline to Submit Protest of Award.....	Seven (7) days from the Intent to Award
Anticipated Contract Start Date.....	May, 2019

## TABLE OF CONTENTS

	Page
Section 1 – Notice of Request for Proposals .....	1
Section 2 – Instructions to Proposers.....	2
Section 3 – Scope of Work .....	6
Section 4 – Evaluation and Selection Criteria .....	12
Section 5 – Proposal Content (Including Proposal Certification).....	13

**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, April 10, 2019** (“Closing”), to provide **Electronic Plans Review Change Management Services**. No Proposals will be received or considered after that time.

RFP Documents can be downloaded from ORPIN at the following address:

<http://orpin.oregon.gov/open.dll/welcome>, Document No. C01010-2019-11-19.

Prospective Proposers will need to sign in to download the information and that information will be accumulated for a Plan Holder's List. Prospective Proposers are responsible for obtaining any Addenda from Website listed above. Sealed Proposals are to be sent to Clackamas County Procurement Services – Attention George Marlton, Director at 2051 Kaen Road, Oregon City, Oregon, 97045 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 ORPIN for any published Addenda or response to clarifying questions.

**2.5 Submission of Proposals:** 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 192.345(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 192.345(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 192.345). 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 to provide Change Management Services for the electronic plan review implementation project, focused on deploying the following new software programs: Avolve OAS, ProjectDox, and Plans Anywhere.

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.

**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**

In 2018, DTD performed an extensive visioning process which resulted in an updated strategic plan. Two strategic areas of focus for the department include Customer Service and Community Engagement, and the revised strategic plan commits DTD to some major technology initiatives, which implies significant change both within the organization and externally for our customers.

From these strategic areas of focus, the Department developed the following key metrics and initiatives:

***Department of Transportation and Development customers will experience improved access to tools, services and information easily and intuitively through various forms of technology, as evidenced by:***

- *By 2021, electronic plan review (“EPR”) will be available for customers who submit commercial building permit applications, and a plan will be developed for EPR expansion to other permit application types.*
- *By 2019, Accela Citizen Access (“ACA”) will be improved to streamline and enhance the customer experience through redesigning and simplifying the public portal.*

***Department of Transportation and Development customers will experience a consistent, results oriented customer service approach, as evidenced by our exceptional customer service:***

- *90% of people surveyed will continue to report they were happy with the level of service received.*

***Department of Transportation and Development customers will experience improved results and be able to make decisions as a consequence of having timely and relevant information, as evidenced by:***

- *90% of people surveyed will report the department website was easy to navigate and that they were able to find the information they were seeking.*

In service to these strategic goals, 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 technology initiatives must be carefully balanced with our customer satisfaction ratings, as one influences the other. 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.

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 will be able to digitally track and view the status of their project through all phases of plans review, through to the issuance of the 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.

These are public facing portals, so we will need to carefully consider the needs of each stakeholder as customer satisfaction is a top priority for the department. So, effectively managing this change is imperative for both the successful software implementations and achieving DTD strategic goals.

### **3.3. SCOPE**

#### **3.3.1. Project Leadership**

The Development Review Managers group will serve as the main governing body for these technology initiatives. The Development Review Managers group is comprised of supervisors, managers and senior management from the Department's 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.

#### **3.3.2. Objectives**

The department wishes to engage the services of one or more professional services organizations with significant expertise and experience in change management to assist in the attainment of the following objectives:

1. Successful implementation of the technological changes outlined in DTD's Strategic Plan, summarized above.
2. Significant and lasting improvement in DTD's internal capacity for change management, innovation, and continuous improvement.

### 3.3.3. Deliverables

1. Awarded contractor will provide an assessment of DTD's capacity and readiness for change and of its organizational change efforts to date. This should include, at minimum:
  - a. Individualized assessments of the readiness to lead change on the part of approximately ten (10) managers, both in the development review workgroup and in DTD administration. (The department will provide a list of staff to be included.)
  - b. An overall (not individualized) assessment of supervisory and front-line staff's readiness for change and support needed by these groups to navigate and assimilate the changes. (The department will work with the consultant to develop a list of staff to be interviewed or otherwise contacted in this process.)
  - c. A review of DTD's change efforts to date, identifying areas of potential improvement in the agency's approach to and management of change ("mid-course corrections").
  - d. A review of DTD's internal communications capabilities and practices, identifying areas of potential short-term and long-term improvement.

**\*Proposers may recommend additional elements for inclusion in the assessment.**

2. A comprehensive change management "game plan", developed in close collaboration with DTD management and the project team. This should include, at minimum:
  - a. A definition and articulation of the need(s) for change - i.e. the "change message, or call to action".
  - b. A leadership development plan to improve the department's internal change management capabilities at the executive level.
  - c. An internal communications development plan to improve the department's internal communications capabilities.
  - d. A change management program - composed of specific initiatives and actions the department can implement - to mitigate the disruptive effects of major changes already underway and planned for the near future.

**\*Proposers may recommend additional elements for inclusion in the "game plan."**

3. Provide and execute a change management plan for the ePlans initiative, for all phases of this effort from initial project scoping to implementation of the technology initiatives. This plan should include providing direct support of the implementation team. This team will include outside consultants (such as, outreach/branding, software vendor, Accela system representatives and app development representatives), internal service providers (such as, technology services and public and government affairs), County staff (from Transportation & Development and Water Environment Services), service districts (such as fire, drinking water and sanitary sewer utility providers) and customers (such as homeowners, residential/commercial builders, and consultants).

Provided support should include, at minimum:

- a. Development, in close collaboration with department management, and in consultation with the implementation team, of a project-specific change management plan.
- b. Facilitation and oversight, in close collaboration with department management, and in consultation with the implementation team, of the approved change management plan.
- c. Ongoing coaching and development at the senior management and supervisory levels.
- d. Preparation and facilitation of face-to-face events (focus groups, lunch-and-learn, large group presentations, etc.) as called for by the project-specific change management plan.

- e. Preparation of on-line and/or printed materials as called for by the project-specific change management plan.

Because this element of the Scope of Work is somewhat fluid, proposers are asked to provide their hourly rates and to provide illustrative estimates of time required for their proposed approach. DTD reserves the right to evaluate the comparative proposed cost of this element by applying its own estimates of hours required.

4. Additional activities as required. As above, proposers are asked to provide their hourly rates for additional work. The department reserves the right to evaluate the comparative proposed cost of this element by applying its own estimates of hours required.

### **3.4. Skills and Experience**

All prospective proposers shall have sufficient qualified personnel and resources to accomplish all the services described herein. The successful Proposer shall be capable of furnishing all necessary professional, technical, and expert services as required to perform the services described in the scope of work.

The Proposer must demonstrate the knowledge, experience and expertise to work on the project. At a minimum, the key staff will include at least one individual to provide the complete services as outlined in the Scope of Work. To ensure that the selected consultant is capable of providing an acceptable level of service on this project, the following minimum requirements must be met.

#### **3.4.1. Required Skills**

1. Must have a minimum of three (3) years of experience assisting organizations consisting of about 100 employees with developing and implementing organizational change, preferably for technology initiatives;
2. 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;
3. Must have managed at least one (1) software implementation project of similar scope and complexity within the last five (5) years;
4. Must have experience:
  - a. Designing and implementing internal communications plans;
  - b. Providing executive development coaching or leadership training services;
  - c. Facilitating group teams; excellent interpersonal skills and the ability to adapt to changes in course while maintaining productivity;
  - d. Excellent oral and written communication skills and problem-solving ability; and
  - e. Developing metrics for evaluating organizational change programs.

#### **3.4.2. Desired Skills**

1. Experience successfully performing at least one contract providing comparable consulting services with a development services agency, or firm, of similar size and complexity to Clackamas County, which integrated both internal and external customers; and
2. Experience successfully managing at least one (1) implementation project that involved integrating the proposed software, or similar software, with existing platforms within the last five (5) years; and
3. 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. At the sole discretion of the County, top scoring candidates may be contacted for interviews. Evaluation criteria is stated in Section 4 of this RFP. 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 (1) or more managers from the County.

### **3.5. Submission Requirements**

To be considered responsive, a proposal must contain the following, prefaced by a table of contents, referenced by number and in the order below.

1. A brief description of the history and organization of the proposer's firm, and of any proposed subcontractor.
2. A description of at least three (3) similar projects completed by the proposer within the past three (3) years. Include personal references with contact information for each.
3. Qualifications, background and experience and proposed role of any staff proposed to work on the project.
4. A general description of the techniques, approaches and methods to be used in completing the project.
5. A description of the chronology for completing the work, including a time line and deadlines for each task.
6. A detailed cost proposal, including any travel costs and other expenses. As the department may award a contract based on the initial offer, a proposer should make its initial offer on the most favorable terms available. The department reserves the right, however, to have discussions with those proposers falling within a competitive range, and to request revised pricing offers from them and to make an award or conduct negotiations thereafter.
7. Requirements are further described within Section 5.

#### **3.5.1 Submission Requirements Format Summary**

Proposals should be prepared simply and economically, providing a straightforward and concise description of the Vendor's ability to meet the requirements of this RFP. Emphasis should be on completeness and clarity of content.

1. Proposals that fail to address each of the submission requirements above may be deemed non responsive and will not be further considered. The department, solely upon its own discretion, will evaluate proposals on their overall compliance, and may evaluate a vendor to be materially compliant, even if that vendor is non-compliant to a particular requirement of the RFP.
2. If specific submission requirements are particularly large and self-contained they may be included in a separate appendix rather than in the body of the proposal. Submittals should not direct the evaluation team to general brochures, marketing materials or websites to obtain information related to the specific submission requirements; submittals that utilize references to external materials as an answer will be considered non-responsive.
3. Submittals should provide straightforward and concise information that fulfill the requirements of the RFP. Emphasis should be placed on brevity, conformity to the RFP' instructions, and completeness and clarity of content. Proposals should not include generic promotional materials and graphics that increase page count and PDF file size without addressing substantive content.

### **3.6. Term of Contract:**

The term of the contract shall be from the effective date through **June 30, 2022** with the option for a one (1) year renewal thereafter subject to the mutual agreement of the parties.

**3.7. 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>.

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.

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

- Provide a brief description of the history and organization of the proposers firm, and of any proposed subcontractor.
- Provide a description of at least three (3) similar projects completed by the proposer within the past three (3) years. Include personal references with contact information for each.
- Provide the qualifications, background and experience and proposed role of any staff proposed to work on the project.
- Provide a description of proposer's ability to meet the requirements in Section 3; and
- Provide a description of what distinguishes this proposer from other proposers performing a similar service.

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

- Provide a description of the techniques, approaches and methods to be used in completing the project.
- Provide a description of the chronology for completing the work, including a time line and deadlines for each task as detailed in Section 3.

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

Provide a detailed cost proposal, including any travel costs and other expenses. As the County may award a contract based on the initial offer, a proposer should make its initial offer on the most favorable terms available. 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. Points awarded for this criteria are based on both the providing of references as well as information gleaned from the provided contacts. Evaluation Committee members may contact references at their sole discretion.

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

**PROPOSAL CERTIFICATION**  
**RFP #2019-11 Electronic Plans Review Change Management Services**

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: \_\_\_\_\_