



**RFP No. ONI001**

**PROFESSIONAL, TECHNICAL AND EXPERT SERVICES**

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**City of Portland, Oregon  
December 6, 2006**

**REQUEST FOR PROPOSALS**

**for**

**Diversity and Civic Leadership Academy**

**PROPOSALS DUE: Friday, January 19, 2007 by 4:00 p.m.**

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

**Submit one (1) original and six (6) complete copies of the Proposal to:**

City of Portland  
Office of Neighborhood Involvement  
Attn: Jeri Williams  
1221 SW 4<sup>th</sup> Ave., Room 110  
Portland, OR 97204

**Refer questions to:**

Jeri Williams, Neighborhood Resource Center, Neighborhood Program Coordinator  
Phone: (503) 823-5827  
Fax: (503) 823-3050  
Email: [Jeri.Williams@ci.portland.or.us](mailto:Jeri.Williams@ci.portland.or.us)

**A PRE-SUBMITTAL MEETING has been scheduled for Thursday, January 4, 2007, 10:30 AM – 12:00 Noon, at City Hall, 1221 SW 4<sup>th</sup> Ave., Lovejoy Room.**

## GENERAL INSTRUCTIONS AND CONDITIONS

**DIVERSITY IN EMPLOYMENT AND CONTRACTING REQUIREMENTS** – The City of Portland seeks to extend contracting opportunities to Minority Business Enterprises, Women Business Enterprises and Emerging Small Businesses (M/W/ESBs) in order to promote their economic growth and to provide additional competition for City contracts. Therefore, the City has established an overall 20% utilization goal in awarding PTE contracts to ESBs. No goal is set for the use of M/WBE firms, but the City is committed to ensuring that such firms receive opportunities and equal consideration to be awarded City PTE contracts.

**ENVIRONMENTALLY PREFERABLE PROCUREMENT** - In accordance with the City's Sustainable City Principles and the City's Sustainable Procurement Strategy, it is the policy of the City of Portland to encourage the use of products or services that help to minimize the human health and environmental impacts of City operations. Therefore, proposers are encouraged to incorporate environmentally preferable products or services into their responses wherever possible. "Environmentally preferable" means products or services that have a lesser or reduced effect on human health and the environment when compared with competing products or services that serve the same purpose. This comparison may consider raw materials acquisition, production, manufacturing, packaging, distribution, reuse, operation, maintenance, or disposal of the product or service. To view the above City policies go to [www.portlandonline.com](http://www.portlandonline.com) and navigate to "Charter, Code & Policies Documents".

**INVESTIGATION**- The proposer shall make all investigations necessary to inform it regarding the service(s) to be performed under this request for proposal.

**SPECIAL CONDITIONS** - Where special conditions are written in the Request for Proposal, these special conditions shall take precedence over any conditions listed under the Professional, Technical and Expert Service "General Instructions and Conditions".

**CLARIFICATION OF REQUEST FOR PROPOSAL**- Proposers who request a clarification of the RFP requirements must submit questions in writing to the person(s) shown in the REFER QUESTIONS TO section on the cover of this RFP, or present them verbally at a scheduled pre-submittal conference, if one has been scheduled. The City must receive written questions no later than the date stated herein. The City will issue a response in the form of an addendum to the RFP if a substantive clarification is in order.

Oral instructions or information concerning the request for proposal given out by Bureau or Office managers, employees or agents to prospective proposers shall not bind the City.

**ADDENDUM** – Any change to this RFP shall be made by written addendum issued no later than 72 hours prior to the proposal due date. The City is not responsible for any explanation, clarification or approval made or given in any manner except by addendum.

**COST OF PROPOSAL**- This Request for Proposal does not commit the City to pay any costs incurred by any proposer in the submission of a proposal or in making necessary studies or designs for the preparation thereof, or for procuring or contracting for the services to be furnished under the request for proposal.

**CANCELLATION** – The City reserves the right to modify, revise or cancel this RFP. Receipt and evaluation of proposals or the completion of interviews do not obligate the City to award a contract.

**LATE PROPOSALS**- Proposals received after the scheduled closing time for filing will be returned to the proposer unopened.

**REJECTION OF PROPOSALS**- The City reserves the right to reject any or all responses to the Request for Proposal if found in the City's best interest to do so. In the City's discretion, litigation between the City and a proposer shall be cause for proposal rejection, regardless of when that litigation comes to the City's attention and regardless of how the consultant's proposal may have been scored. Proposals may also be rejected if they use subcontractors or subconsultants who are involved in litigation with the City. Proposers concerned about possible rejection on this basis should contact the City before submission of a proposal for a preliminary determination of whether its proposal will be rejected.

**CITY OF PORTLAND BUSINESS LICENSE** - Successful consultant shall obtain a current City of Portland Business License prior to initiation of contract and commencement of the work.

**WORKERS COMPENSATION INSURANCE** – the successful consultant shall be covered by Workers Compensation Insurance or shall provide evidence that State law does not require such coverage.

**CERTIFICATION AS AN EEO AFFIRMATIVE ACTION EMPLOYER**- Proposers must be certified as Equal Employment Opportunity Affirmative Action Employers as prescribed by Chapter 3.100 of the Code of the City of Portland. The required documentation must be filed with the Bureau of Purchases, City of Portland, prior to contract execution.

**CONFLICT OF INTEREST** - A proposer filing a proposal thereby certifies that no officer, agent or employee of the City who has a pecuniary interest in this request for proposal has participated in the contract negotiations on the part of the City, that the proposal is made in good faith without fraud, collusion or connection of any kind with any other proposer of the same call for proposals, and that the proposer is competing solely in its own behalf without connection with or obligation to, any undisclosed person or firm.

**CONFIDENTIALITY** – All information submitted by proposers shall be public record and subject to disclosure pursuant to the Oregon Public Records Act (ORS 192.410 et seq.), except such portions of the proposals for which proposer requests exception from disclosure consistent with Oregon Law. Any portion of a proposal that the proposer claims constitutes a "trade secret" or is "confidential" must meet the requirements of ORS 192.501(2) and ORS 192.502(4).

If a request to inspect the proposal is made, the City will notify the proposer of the request. If the City refuses to release the records, the proposer agrees to provide information sufficient to sustain its position to the District Attorney of Multnomah County, who currently considers such appeals. If the District Attorney orders that the records be disclosed, the City will notify the proposer in order for the proposer to take all appropriate legal action. The proposer further agrees to hold harmless, defend and indemnify the City for all costs, expenses and attorney fees that may be imposed on the City as a result of appealing any decision regarding the proposer's records.

The Purchasing Agent has the authority to waive minor irregularities and discrepancies that will not affect the competitiveness or fairness of the solicitation and selection process.

**These Professional, Technical and Expert Services Request for Proposal "General Terms and Conditions" are not to be construed as exclusive remedies or as a limitation upon rights or remedies that may be or may become available under ORS Chapter 279.**

# PART I

# CONTRACT REQUIREMENTS

## SECTION A

## GENERAL INFORMATION

### 1. INTRODUCTION

The City is requesting a proposal for services to assist in the design, development and implementation of a **Diversity and Civic Leadership Academy**. The program developed under this contract is designed to broaden diverse participation in the civic governance of the City through developing the organizational leadership skills of new community-based leaders with a focus on communities of color, including people of color from immigrant and refugee communities.

### 2. BACKGROUND

The City of Portland recognizes policy, planning, and budgeting processes are best served when developed with public input representing a diverse cross-section of Portland's increasingly diverse communities. Community leaders have advocated the City needs to more aggressively engage communities of color through community-based organizations that are culturally specific to their constituencies.

This project is one of several new initiatives within the Office of Neighborhood Involvement (ONI) that provide a framework for the City's public involvement efforts and neighborhood system to better serve and engage traditionally underrepresented population groups in the civic governance of the City.

In 2005 the Diversity and Civic Leadership Committee (DCLC), a diverse group of community and neighborhood leaders, developed a proposal for the City to fund including a Diversity and Civic Leadership Academy and a Neighborhood and Community Engagement Initiative. The DCLC's intent for the first is to build the capacity of under-represented groups in order to increase their participation in the civic governance of the City. The intent of the second is to expand the ability of neighborhood associations to engage diverse neighbors and build partnerships with under-represented groups. The committee's proposal was adopted by City Council as part of the FY 2006-07 budget for the Office of Neighborhood Involvement.

#### **The goals of this project include:**

1. Support efforts to build the organizational capacity and leadership skills of community organizations of color and immigrant/refugee organizations to be more effective advocates for the advancement of policies to achieve economic and social equity for their constituencies.
2. Create a source of leadership from communities of color to develop representation on City advisory committees, boards and commissions, neighborhood associations, and a wide array of City public involvement opportunities.
3. Encourage the development of collaborations and partnerships between a wide-range of community organizations, including neighborhood and business associations, where there may be opportunities to work on common community and neighborhood livability issues.

### 3. SCOPE OF WORK

The City of Portland's Office of Neighborhood Involvement (ONI) is seeking proposals from community-based non-profits, individuals, firms, teams or consultants, hereafter called "Proposer(s)", with demonstrated experience in community organizing and leadership development with intentional focus on developing leaders of color, immigrant and refugee leaders. Proposals demonstrating a multi-ethnic collaboration of several organizations will be encouraged.

The Office of Neighborhood Involvement proposes to engage the successful Proposer to design, develop and implement a Diversity and Civic Leadership Academy including the recruitment of a multi-ethnic mix of new and emerging community leaders to participate in a leadership training program and incorporating a community service learning component.

**4. PROJECT FUNDING**

The anticipated cost for the services described herein is \$70,000. The consultant's proposal shall include the consultant's true estimated cost to perform the work irrespective of the City's budgeted funds for this work.

**5. TIMELINE FOR SELECTION** The following dates are proposed as a timeline for this project:

Pre-submittal conference at 10:30 a.m.	Thursday, Jan. 4, 2007
Written proposals due at 4:00 p.m.	Friday, Jan. 19, 2007
Selection committee recommendation	First week of Feb. 2007
Contract negotiation with successful Proposer	Early Feb. '07
Notice to proceed – work begins	Mid -Late February '07

**The City reserves the right to make adjustments to the above noted schedule as necessary.**

**SECTION B**

**WORK REQUIREMENTS**

**1. TECHNICAL OR REQUIRED SERVICES**

The successful Proposer shall perform the tasks listed below for this project, and shall be expected to work closely with designated City personnel to accomplish these objectives:

**A. Participant recruitment:** Recruit a multi-ethnic mix of new and emerging community leaders, with a focus on individuals from communities of color, immigrant and refugee communities, to participate in the training modules and community service learning described below. Proposer is to establish a quantitative goal in their proposal for the number of participants that they think can be reasonably managed in this program.

Criteria for recruiting participants:

- For the purposes of this project we define communities of color to include: Asian-American and Pacific Islander, African-American, Latino, American-Indian and Native Alaskan, including people of color in immigrant and refugee communities.
- Participants need to be sponsored by a community-based organization, meaning they are currently volunteering, have been active or have volunteered in the past two years with the sponsor organization, or show other evidence of being already engaged in community-based leadership. Participation must be open to individuals sponsored by organizations beyond just the Proposer organization(s).
- The geographic scope is limited to participants who either live, work or volunteer within the City of Portland and organizations actively organizing within the City of Portland.
- Proposer may suggest a nominal fee from sponsor organizations but are not required to do so. These would not be considered fees-for-services.
- Stipends and/or scholarships to encourage participation of individuals for whom loss of time away from work would be a financial hardship are allowed, but not required.
- Participants must be engaged in building leadership skills for the purposes of community advocacy and organizing rather than the delivery of social services.

**B. Training Modules:** Design, develop and implement a leadership training program that incorporates training modules addressing as many of the following skill sets as possible:

- a. **Creative and critical thinking:** Using analysis, negotiation, diplomacy and advocacy to solve community issues. Understanding power and altering the relations of power, how to turn problems into issue statements.
- b. **City governance:** How to navigate City Hall and make your voices heard

- including comprehension of City budgets, linking community-based issues with City policy and planning priorities, understanding of Portland's public involvement processes and neighborhood and business association system.
- c. **Community organizing:** Issue-based campaigns, membership development, volunteer recruitment and retention, leadership and board development.
- d. **Communications and media:** Public speaking; presentation of information using multiple media technologies, i.e. internet, video, TV, radio, and print.
- e. **Movement building:** Understanding the role of power in relations between organizations and the difference between alliances, coalitions, collaborations, and partnerships.
- f. **Public and political education:** Culturally appropriate message development, popular education, and outreach strategies to educate constituencies on critical community-based issues.
- g. **Development:** Grant writing, individual donor development, and special events.
- h. **Conflict Resolution:** Basics of mediation and/or collaborative problem-solving strategies.

**C. Community service learning:** The successful Proposer(s) will incorporate a creative version of a community service learning strategy for participants in their proposal. Community service learning encompasses a wide array of teaching and learning strategies that integrate meaningful community service with instruction and reflection to enrich the learning experience, teach civic responsibility, and strengthen communities. Organizing a final presentation day encouraged for participants to summarize their experiences for public and celebrate completion of the training program.

Examples may include but are not limited to:

- a. **Hands-on projects:** Participants design and lead a small scale hands-on project with their sponsoring organization incorporating skill sets they're learning in the training modules.
- b. **Mentorships:** Linkage of participants with more established/experienced community leaders or one-on-one time with project staff to develop personal goals and work plans within their sponsor organizations.
- c. **Internships:** Participants structure their internship/volunteer time with their sponsoring organization which models some of the skill sets covered in the training modules above.

**D. Interaction with City bureaus, elected officials, neighborhood system:** The successful Proposer(s) shall allow for a limited number of engagements for participants to meet with City bureau staff, elected officials, neighborhood district coalition and/or neighborhood association leaders. ONI will take the lead in organizing these engagements in coordination with the successful Proposer's work plan. The goal of these interactions is to encourage building relationships and consideration of opportunities for collaboration on mutual community issues. Proposer(s) is invited, but not required, to suggest strategies for organizing these interactions.

## 2. WORK PERFORMED BY THE CITY

The City has assigned a project manager to oversee the successful Proposer's work and provide support as needed. Specific duties the City will perform include:

- Administer and monitor this contract for compliance with the City's administrative policies and procedures, including quarterly site visits, to assure that the goals and scope of work for this contract are being met. ONI shall confer with the successful Proposer(s) regarding any problem areas relating to the performance of this contract by either party.
- Meet with the successful Proposer and provide such information as required to help plan, implement and evaluate the project.
- Provide limited assistance with efforts to promote the program. ONI has an extensive list of community-based organizations for recruitment purposes.
- Provide any leadership training curriculum materials it has available for use by

successful Proposer. ONI has an extensive file of organizational and leadership training materials.

- ❑ Organize networking opportunities between participants and sponsor organizations with City bureau staff, elected officials, district coalitions and/or neighborhood association leaders to encourage building organizational relationships and for identifying opportunities to work on common issues.

### 3. DELIVERABLES AND SCHEDULE

Deliverables shall be considered those tangible resulting work products that are to be delivered to the City such as reports, draft documents, data, interim findings, drawings, schematics, training, meeting presentations, final drawings and reports. The successful Proposer is encouraged to provide any deliverables in accordance with the City's Sustainable Paper Use Policy. The policy can be viewed at: <http://www.portlandonline.com/omf/index.cfm?c=37732> .

Deliverables and schedule for this project shall include:

Date	Action
March 2007	Work plan including: <ul style="list-style-type: none"> <li>❑ Responsibilities of partnering organizations,</li> <li>❑ Timeline and strategy for recruiting participants, including final proposed number of participants,</li> <li>❑ Schedule for training modules, description of each one including how they reinforce the project goals,</li> <li>❑ Provide template of evaluation form to be completed by participants after each training module,</li> <li>❑ Description of community service learning component including how the proposed strategy reinforces the training modules,</li> <li>❑ Any suggested strategies for interaction with City bureaus, elected officials, neighborhood system (voluntary),</li> <li>❑ Expected project outcomes.</li> </ul>
May 2007	1 <sup>st</sup> Quarterly report (Feb. – April) including: <ul style="list-style-type: none"> <li>❑ Narrative update on progress to date for participant recruitment, development of training modules and community service learning, (maximum two pages),</li> <li>❑ Copies of training module curricula developed to date, including course outlines, handouts, and summary of evaluation forms to be used.</li> </ul>
August 2007	2 <sup>nd</sup> Quarterly report (May – July) including: <ul style="list-style-type: none"> <li>❑ Narrative update on how experience is going for participants, implementation of training modules and community service learning, (maximum two pages),</li> <li>❑ List of participants including names, sponsoring organizations, contact information for both,</li> <li>❑ Copies of training module curricula developed to date, including course outlines, handouts, and summary of evaluations,</li> <li>❑ Summaries of each participant's community service learning plan (maximum one page each).</li> </ul>
November 2007	3 <sup>rd</sup> Quarterly report (August - October) including: <ul style="list-style-type: none"> <li>❑ Narrative update on how experience is going for participants, implementation of training modules and community service learning, (maximum two pages),</li> <li>❑ Copies of training module curricula developed to date, including course outlines, handouts, and summary of</li> </ul>

	evaluations.
February 2008	4 <sup>th</sup> Quarterly report (November – January) including: <ul style="list-style-type: none"> <li>❑ Narrative update on how experience is going for participants, implementation of training modules and community service learning, (maximum two pages),</li> <li>❑ Copies of training module curricula developed to date, including course outlines, handouts, and summary of evaluations.</li> </ul>
To be submitted within 30 days of completion of project.	Year-end final report including: <ul style="list-style-type: none"> <li>❑ Narrative overview of project accomplishments, and assessment of strengths and challenges of training and community service learning methodologies,</li> <li>❑ Summaries of each participants' accomplishments in their community service learning project.</li> </ul>

Specific quarterly performance indicator narrative questions will be developed in consultation with successful Proposer in February 2007. All deliverables and resulting work products from this contract will become the property of the City of Portland.

**5. PERIOD OF PERFORMANCE**

The City anticipates having the selected Proposer begin work February 2007 with submittal of final deliverables to the City occurring by March 2008 at the latest. Proposals containing earlier completion of the contractor's work are acceptable and encouraged.

**7. INSURANCE**

The successful Proposer(s) shall agree to maintain continuous, uninterrupted coverage of all insurance as required by the City. There shall be no cancellation, material change, reduction of limits or intent not to renew the insurance coverage(s) without a 30-day written notice from the successful Proposer or its insurer(s) to the City.

**Workers Compensation Insurance** in compliance with ORS 656.017, which requires subject employers to provide Oregon workers' compensation coverage for all their subject workers (firms with one or more employees, unless exempt under ORS 656.027).

**General Liability Insurance** with a combined single limit of not less than \$500,000 each occurrence for Bodily Injury and Property Damage. It shall include contractual liability coverage for the indemnity provided under this contract, and shall provide that the City of Portland, and its agents, officers, and employees are Additional Insureds but only with respect to the successful Proposer's services to be provided under this Contract.

**Automobile Liability Insurance** with a combined single limit of not less than \$500,000 each occurrence for Bodily Injury and Property Damage, including coverage for owned, hired, or non-owned vehicles, as applicable.

**Professional Liability Insurance** with a combined single limit of not less than \$1,000,000 each claim, incident, or occurrence. This is to cover damages caused by negligent acts, errors or omissions related to the professional services to be provided under this contract.

**Certificates of Insurance:** As evidence of the insurance coverages, the successful Proposer shall furnish acceptable insurance certificates to the City at the time signed contracts are returned to the City. The certificate will specify all of the parties who are Additional Insureds and will include the 30-day cancellation clause as identified above. Insuring companies or entities are subject to City acceptance. If requested, complete policy copies shall be provided to the City. The successful Proposer shall be financially responsible for all pertinent deductibles, self-insured retentions, and/or self-insurance.

**SECTION C**

**ATTACHMENTS**

## 1. SAMPLE CONTRACT

The Professional, Technical and Expert Services Contract is the City's standard contract and will be used as a result of this selection process. A sample contract can be viewed at: <http://www.portlandonline.com/shared/cfm/image.cfm?id=27067> .

## PART II

## PROPOSAL PREPARATION AND SUBMITTAL

### SECTION A

#### PRE-SUBMITTAL MEETING/CLARIFICATION

##### 1. PRE-SUBMITTAL MEETING

There will be a pre-submittal meeting **on Thursday, January 4, 2007, at 10:30 a.m., in the Lovejoy Room, on the second floor of City Hall, 1121 SW 4<sup>th</sup> Ave.**

This is a **non-mandatory** meeting; therefore proposal submission will not be contingent upon attendance at this meeting.

##### 2. PROPOSAL CLARIFICATION

Questions and requests for clarification regarding this Request for Proposal must be directed in writing, via email or fax, to the person listed below. **The deadline for submitting such questions/clarifications is Friday, January 12, 2007.** An addendum will be issued no later than 72 hours prior to the proposal due date to all recorded holders of the RFP if a substantive clarification is in order.

Jeri Williams, Neighborhood Program Coordinator  
Office of Neighborhood Involvement, Neighborhood Resource Center  
1120 S. W. Fifth Ave. Rm. 1100  
Portland, Oregon 97204  
Email: [Jeri.Williams@ci.portland.or.us](mailto:Jeri.Williams@ci.portland.or.us)  
Phone: (503) 823-5827  
Fax: (503) 823-3050

### SECTION B

#### PROPOSAL SUBMISSION

##### 1. PROPOSALS DUE

Sealed proposals must be received no later than the date and time, and at the location, specified on the cover of this solicitation. The outside of the envelope shall plainly identify the subject of the proposal, the RFP number and the name and address of the Proposer. Responses received after time or date listed herein shall not be considered. Proposals received after the scheduled closing time for filing will be returned to the Proposer unopened.

##### 2. PROPOSAL

Proposals must be clear, succinct and not exceed 12 pages, excluding attachment materials. Proposers who submit more than the pages indicated may not have the additional pages of the proposal read or considered.

For purposes of review and in the interest of the City's Sustainable Paper Use Policy and sustainable business practices in general, the City encourages the use of submittal materials (i.e. paper, dividers, binders, brochures, etc.) that contain post-consumer recycled content and are readily recyclable. The City discourages the use of materials that cannot be readily recycled such as PVC (vinyl) binders, spiral bindings, and plastic or glossy covers or dividers. Alternative bindings such as reusable/recyclable binding posts, reusable binder clips or binder rings, and recyclable cardboard/paperboard binders are examples of preferable submittal materials. Proposers are encouraged to print/copy on both sides of a single sheet of paper wherever applicable; if sheets are printed on both sides, it is considered to be two pages. Color is acceptable, but content should not be lost by black-and-white printing or copying.

All submittals will be evaluated on the completeness and quality of the content. Only those Proposers providing complete information as required will be considered for evaluation.

The ability to follow these instructions demonstrates attention to detail.

### 3. ORGANIZATION OF PROPOSAL

Proposers must provide all information as requested in this Request for Proposal (RFP). Responses must follow the format outlined in this RFP. Additional materials in other formats may not be considered. The City may reject as non-responsive at its sole discretion any proposal or any part thereof, which is incomplete, inadequate in its response, or departs in any substantive way from the required format.

## SECTION C

### EVALUATION CRITERIA

#### 1. COVER LETTER

By submitting a response, the Proposer is accepting the General Instructions and Conditions of this Request for Proposal (reference second page of the RFP).

The Cover Letter must include the following:

- RFP number and project title
- name(s) of the person(s) authorized to represent the Proposer in any negotiations
- name(s) of the person(s) authorized to sign any contract that may result
- contact person's name, mailing or street addresses, phone and fax numbers and email addresses

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

Prior to contracting the successful Proposer must have a City of Portland Business License and be certified as an Equal Employment Opportunity (EEO) employer. If your firm currently has a business license and is EEO certified, include your firm's City of Portland Business License number as well as the Equal Employment Opportunity (EEO) expiration date.

#### 2. PROJECT TEAM

This relates to the project lead organization, project manager, key staff and any sub-consultants, if applicable. This section should describe:

##### Project team

- Organization's mission, commitment and strengths with regard to how they match the goals of this project;
- Describe the project team's key accomplishments and impact on the community over the past (3) years;

##### Qualifications and Experience

- Names of key members who will be performing the work on this project, and:
  - Their responsibilities on this project
  - The extent of the project manager's responsibilities and involvement
- Team qualifications and experience on similar or related projects
  - Qualifications and relevant experience of prime consultant/organization
  - Qualifications and relevant experience of sub-consultants
  - Project manager's experience with similar projects

##### Management Approach

- Describe or provide a description of firm's approach to overall management and integration of all activities required by the scope of work.

#### 3. RESPONDENT'S CAPABILITIES

This section relates to the Proposer's capabilities and resources in relation to this RFP. This section should describe:

- Similar projects performed within the last three (3) years, which best characterize Proposer's capabilities, effectiveness, work quality and cost control;

#### 4. PROJECT APPROACH AND UNDERSTANDING

- Proposer's resources available to perform the work for the duration of the project.

This section seeks to clarify if the Proposer has a clear, concise understanding of the project as well as clarify any major issues based upon existing information such as:

##### **Approach and understanding of the project**

- Describe your organizational philosophy and experience with respect to community-based organizational and leadership development;
- Describe the experience of the Proposer(s) regarding maintaining relationships with a diverse range of underrepresented community-based organizations.

This section needs to answer the following for each of the core work components including:

##### **Participant recruitment**

- Description of your strategy for recruiting participants,
- Estimated timeline to complete recruitment,
- The number of participants you plan to recruit,
- Describe the use of any incentives for engaging participants for whom income or life circumstances might otherwise limit participation.

##### **Training modules**

- Course summary:
  - How will the project team work together to organize the trainings?
  - Brief description of each proposed training module
- Goals and Objectives:
  - What are your goals and objectives for each module?
- Training Outline/Timeline and logistics:
  - What is the chronological structure of the trainings, time frame?
  - Suggest types of activities related to each training module – presentations, skits, exercises, ice-breakers, use of media, etc.?
  - Suggest what the logistics might look like – location, length of each training module, and other support services?
- Training evaluation:
  - Include a plan for evaluating the effectiveness/objectives of the training modules.
  - How do you assess the participants' application of what they've learned in the trainings?

##### **Community service learning**

- Description of your strategy for designing, developing and integrating a community service learning component into the training program.
- If this includes mentorships or internships describe some examples of organizational relationships in place to provide those opportunities.

##### **Interaction with city bureau staff, elected officials, and neighborhood system**

- ONI is responsible for taking the lead on this component. However, you can include any suggested strategies or ideas for this in your work plan.

Where needed please identify and/or clarify points of input and review with ONI project staff.

#### 5. DIVERSITY IN

The City is committed to increasing contracting opportunities for State of Oregon certified

## EMPLOYMENT AND CONTRACTING REQUIREMENTS

minority, women and emerging small business (M/W/ESB) enterprises. The City values, supports and nurtures diversity, and encourages any firm contracting with the City to do the same, maximizing M/W/ESB business participation with regard to all City contracts. As such, the City has established an overall 20% utilization goal in awarding PTE contracts to State of Oregon certified emerging small business (ESB) enterprises and has assigned at least 15% of the total points available on this solicitation to determine the award of this contract. No goal is set for the use of minority (MBE) and women business (WBE) enterprises, but the City is committed to ensuring that such firms receive opportunities and equal consideration to be awarded City PTE contracts.

All Proposers shall address the following in their proposals:

- a. Indicate if your firm is currently certified in the State of Oregon as an MBE, WBE and/or ESB, or if your firm has applied for certification with the State of Oregon's Office of Minority, Women and Emerging Small Business (OMWESB).
- b. Identify your current diversity of workforce and describe your firm's commitments to providing equal employment opportunities. Include in your response:
  - Number of total employees and description of type of work performed.
  - Number of minorities and women within your current workforce, broken out by ethnicity and positions held.
  - Any underutilization of minorities or women within your workforce and your firm's efforts to remedy such underutilization.
  - Any plans to provide innovative mentoring, technical training or professional development opportunities to minorities and women in your workforce in relation to this project, or plans to employ minorities and women to work on this project.
  - Description of the process your firm uses to recruit minorities and women.
- c. Have you subcontracted or partnered with State of Oregon certified M/W/ESB firms on any project within the last 12 months? If so, please describe the history of the firm's subcontracting and partnering with certified M/W/ESB firms. Include in your response:
  - List of State of Oregon certified M/W/ESB firms with which your firm has had a contractual relationship during the last 12 months.
  - Any innovative or successful measures that your firm has undertaken to work with M/W/ESB firms on previous projects.
  - Any mentoring, technical or other business development services your firm has provided to previous or current M/W/ESB subconsultants or partners, or will provide in relation to this project.
- d. Are you subcontracting any element of your proposal? Describe your firm's plan for obtaining maximum utilization of certified M/W/ESB firms on this project. Include in your response:
  - Subcontracting opportunities your firm has identified in the scope of this project.
  - Efforts made relating to outreach and recruitment of certified M/W/ESB firms. Did your firm advertise contracting opportunities in the *Daily Journal of Commerce*, *Skanner*, *Oregonian*, *Observer*, *El Hispanic News*, *Asian Reporter*, and/or other trade publications? Did your firm conduct any outreach meetings? Did your firm use the State's OMWESB certification list, or other source, as a basis for direct outreach? What were the actual results of any of the above efforts?
  - Any proposals received from certified M/W/ESB firms. If any such proposals were rejected, provide reasons for rejection.
  - Other efforts your firm used or proposes to use in relation to this project.
- e. If your firm will be utilizing certified M/W/ESB firms on this project, please list those firms and detail their role within your proposal.

The City expects thoughtful consideration of all of the above Diversity in Employment

and Contracting criteria in the preparation of proposals, and will enforce all diversity in workforce and M/W/ESB commitments submitted by the successful Proposer.

**6. PROPOSED COST**

The proposal shall include the Proposer’s true estimated cost or fixed-price estimate for the proposed project approach irrespective of the City’s anticipated cost. Additionally, this cost shall include the hourly rates of each person associated with the project as well as the estimated number of hours each staff member will be expected to work on each task. Provide a proposed line item budget for the program.

**PART III**

**PROPOSAL EVALUATION**

**SECTION A**

**PROPOSAL REVIEW AND SELECTION**

**1. EVALUATION CRITERIA SCORING**

Each proposal shall be evaluated on the following evaluation criteria, weighting and maximum points, as follows:

	<b>Criteria</b>	<b>Maximum Score</b>
a.	Cover Letter	0
b.	Project Team	15
c.	Respondent’s Capabilities	20
d.	Project Approach and Understanding	35
e.	Diversity in Employment and Contracting	20
f.	Proposed Cost	10
	<b>Total Points Available</b>	<b>100</b>

**2. PROPOSAL REVIEW**

An evaluation review committee will be appointed to evaluate the proposals received. For the purpose of scoring proposals each of the committee members will evaluate each proposal in accordance with the criteria and point factors listed above. The evaluation committee may seek outside expertise, including but not limited to input from technical advisors, to assist in evaluating proposals.

The successful Proposer shall be selected by the following process:

- a. An evaluation committee will be appointed to evaluate submitted written proposals.
- b. The committee will score the written proposals based on the information submitted according to the evaluation criteria and point factors.
- c. The committee will require a minimum of 10 working days to evaluate and score the written proposals.
- d. A short list of Proposers, based on the highest scores, may be selected for oral interviews if deemed necessary. The City reserves the right to increase or decrease the number of Proposers on the short list depending on the scoring and whether the Proposers have a reasonable chance of being awarded a contract.
- e. If oral interviews are determined to be necessary, the initial scoring will be considered preliminary. Final scores, based on the same evaluation criteria, will be determined following the interviews.
- f. Negotiations will follow with the highest scoring Proposer, and if successful, the highest scoring Proposer and City will enter into a professional services contract for the work.

For contracts over \$100,000, the evaluation committee's recommendation for contract award will be submitted to the Portland City Council for approval. The City has the right to reject any or all proposals for good cause, in the public interest.

**NOTE: In the City’s discretion, litigation between the City and a Proposer shall be cause for proposal rejection, regardless of when that litigation comes to the City’s attention and regardless how the Proposer’s proposal may have been scored. Proposals may also be rejected if they use subcontractors or subconsultants who are involved in litigation with the City. Proposers concerned about possible**

**rejection on this basis should contact the City before submission of a proposal for a preliminary determination of whether its proposal will be rejected.**

**3. CLARIFYING PROPOSAL DURING EVALUATION**

During the evaluation process, the City has the right to require any clarification or change its needs in order to understand the Proposer's view and approach to the project and scope of the work.

**SECTION B**

**CONTRACT AWARD**

**1. CONSULTANT SELECTION**

The City will award a contract to the highest scoring Proposer. Should the City not reach a favorable agreement with the highest scoring Proposer, the City shall terminate negotiations and commence negotiations with the second highest scoring Proposer and so on until a favorable agreement is reached. A consultant selection process will be carried out under Portland City Code Chapter 5.68.

**2. CONTRACT DEVELOPMENT**

The proposal and all responses provided by the successful Proposer may become a part of the final contract. The form of contract shall be the City's Contract for PTE Services.

**3. AWARD REVIEW AND PROTESTS**

REVIEW:

Following the Notice of Intent to Award, the public may view proposal documents. However, any proprietary information so designated by the Proposer as a trade secret and meeting the requirements of ORS 192.501(2) will not be disclosed unless the Multnomah County District Attorney determines that disclosure is required. At this time, Proposers not awarded the contract may seek additional clarification or debriefing, request time to review the selection procedures or discuss the scoring methods utilized by the evaluation committee.

PROTESTS:

Protests may be submitted to the Purchasing Agent only for contracts in excess of the formal limit established by the City Auditor (currently \$21,937), and only from those Proposers who would receive the contract if their protest were successful.

Protests must be received by the Purchasing Agent within seven (7) calendar days UNLESS OTHERWISE NOTED following the date of the City's Notice of Intent to Award was issued. The protest must specifically state the reason for the protest and show how its proposal or the winning proposal was mis-scored or show how the selection process deviated from that described in the solicitation document. The contract award process will be put on hold until the protest has been resolved.

For those contracts estimated over \$100,000, timely protests must include all legal and factual information regarding the protest, and a statement of the form of relief requested. Protests received later than specified or from other than the Proposer who would receive the contract if the protest was successful will not be considered. The exercise of judgment used by the evaluators in scoring the written proposals and interviews, including the use of outside expertise, is not grounds for appeal.

The Purchasing Agent may waive any procedural irregularities that had no material affect on the selection of the proposed contract, invalidate the proposed award, amend the award decision, request the evaluation committee re-evaluate any proposal or require the bureau to cancel the solicitation and begin again to solicit new proposals. In the event the matter is returned to the evaluation committee, the Purchasing Agent shall issue a notice canceling the Notice of Intent to Award. Decisions of the Purchasing Agent are final and conclude the administrative appeals process.