RFP NUMBER 00000384
PROFESSIONAL, TECHNICAL, AND EXPERT SERVICES
City of Portland, Oregon
August, 2016

REQUEST FOR PROPOSALS

For a

Comprehensive 911 Staffing Study and Plan

PROPOSALS DUE: September 29, 2016 by 4:00 p.m.

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

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

Submit the Proposal to:
Bureau of Emergency Communications
Laura Wolfe
3732 SE 99th Street
Portland, OR 97266

Refer questions to:
Laura Wolfe
Email: laura.wolfe@portlandoregon.gov
GENERAL INSTRUCTIONS AND CONDITIONS

CORPORATE RESPONSIBILITY AND SOCIAL EQUITY 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 M/W/ESBs on all City PTE contracts.

CITY SUSTAINABILITY OBJECTIVES – The City has a history of striving to be more sustainable in its operations and planning. Starting with the City’s Sustainable City Principles (1994) the City has established a variety of policies to guide its work on sustainability, including: the Sustainable Procurement Policy, Green Building Policy, Climate Action Plan, and the Storm water Management Manual (to view these and related City policies, go to the Portland Policy Documents Website: http://www.portlandoregon.gov/auditor/26878). As applicable to City procurement, these policies guide the City to buy products and services that will actively contribute to the City’s sustainability objectives.

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

INVESTIGATION – The Proposer shall make all investigations necessary to be informed regarding the service(s) to be performed under this request for proposal.

SPECIAL CONDITIONS – Where special conditions are written in the Request for Proposal (“RFP”), these special conditions shall take precedence over any conditions listed under the Professional, Technical, and Expert Service “General Instructions and Conditions”.

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

Oral instructions or information concerning the Request for Proposal given out by City bureaus, employees, or agents to prospective Proposers shall not bind the City.

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

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

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

LATE PROPOSALS – Proposals received after the scheduled closing time for filing will be rejected as non-responsive and returned to the Proposer unopened.

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

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

WORKERS’ COMPENSATION INSURANCE – Successful Proposer shall be covered by Workers’ Compensation Insurance or shall provide evidence that State law does not require such coverage.

CERTIFICATION AS AN EEO AFFIRMATIVE ACTION EMPLOYER – Successful Proposers must be certified as Equal Employment Opportunity Affirmative Action Employers as prescribed by Chapter 5.33.076 of the Code of the City of Portland. The required documentation must be filed with Procurement Services, City of Portland, prior to contract execution.

EQUAL BENEFITS PROGRAM – Successful Proposers must provide benefits to their employees with domestic partners equivalent to those provided to employees with spouses as described by Chapter 5.33.077 of the Code of the City of Portland. The required documentation must be filed with Procurement Services, City of Portland, prior to contract execution.

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

CONFLICT OF INTEREST – A Proposer filing a proposal hereby certifies that the proposal is made in good faith without fraud, collusion or connection of any kind with any other Proposer of the same request for proposals, that the Proposer is competing solely on its own behalf without connection or obligation to, any undisclosed person or firm, that Proposer is not a City official/employee or a business with which a City official/employee is associated, and that to the best of its knowledge, Proposer, its employee(s), its officer(s) or its director(s) is not a City official/employee or a relative of any City official/employee who: i) has responsibility in making decisions or ability to influence decision-making on the contract project to which this proposal pertains; ii) has or will participate in evaluation, award or management of the contract related to this proposal; or iii) has or will have financial benefits in the contract to which this proposal pertains. Proposer understands that should it elect to employ any former City official/employee during the solicitation period or the term of the contract then that the former City official/Consultant employee must comply with applicable government ethics and conflicts of interest provisions in ORS Chapter 244, including but not limited to ORS 244.040(5) and/or ORS 244.047, and the City’s Charter, Codes and administrative rules, including but not limited to lobbying prohibitions under Portland City Code Section 2.12.080.

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

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

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

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

SOLICITATION REQUIREMENTS

SECTION A

1. INTRODUCTION

The City of Portland Bureau of Emergency Communications BOEC serves as the single public safety answering point (PSAP) for all municipalities located within Multnomah County the Portland Police and Fire Bureaus, Gresham Police and Fire Departments, Multnomah County Sheriff’s Office, which also provides contract police services to the cities of Fairview and Troutdale, and the Corbett and Sauvie Island volunteer Fire Departments. Members also work closely with AMR, a contracted private ambulance service, dispatching emergency responders. The population of Multnomah County is approximately 777,490.

BOEC provides 9-1-1 call-taking and police and fire dispatch services to all of the public safety agencies within Multnomah County and the five (5) incorporated cities within; Fairview, Gresham, Mayview Park, Portland and Troutdale. Six (6) major highways run throughout the county; I5, I205, I405, and Highways 26, 30 and 99. Multnomah County is the smallest in area in Oregon, with a total of 466 square miles, of which 431 square miles are land and 34 square miles are water.

BOEC’s current operations staffing level include 97 dispatcher/calltakers positions; however we are authorized for 120 FTE (this number excludes supervisors, Operations Managers, and administrative staff); We are actively recruiting to fill those positions within the next year. See attached organization chart, Appendix B.

2. BACKGROUND

The City of Portland’s City Council has directed the Bureau of Emergency Communications (BOEC) to conduct a comprehensive staffing study to review its long term staffing requirements, operational set-up; including training, scheduling, ongoing education and quality control. This study must be completed before the FY 2017-2018 budget process has been finalized.

3. SCOPE OF WORK

The City of Portland, Bureau of Emergency Communications (BOEC) is seeking proposals from individuals, firms, teams or consultants, hereafter called “Proposer(s),” with demonstrated experience in evaluating large 9-1-1 center operations; staffing analysis, evaluation and recommendation; 9-1-1 industry best practices; emerging technology; and proposes to engage the successful Proposer to conduct a thorough review and analysis of BOEC’S training, performance, overall service delivery, and an organizational staffing study. The consultant will be expected to identify implementation recommendations that are effective and achievable in the context of an overall strategy.

BOEC and the City of Portland’s Council will rely upon this independent assessment to help guide them with future budgetary decisions.

4. PROJECT FUNDING

The City has not determined the anticipated cost for the requested services. The Proposer’s proposal shall include the Proposer’s true estimated cost to perform the work irrespective of the City’s budgeted funds for this work.

5. TIMELINE FOR SELECTION

The following dates are proposed as a timeline for this project:

| Written proposals due at 4:00 p.m. | September 29, 2016 |
| Announcement of short list Proposers | October 13, 2016 |
| Interviews or additional review, if deemed necessary | October 27, 2016 |
| Work to begin | November 8, 2016 |
| Final report due | February 3, 2017 |
The City reserves the right to make adjustments to the above noted schedule as necessary.

SECTION B

1. TECHNICAL OR REQUIRED SERVICES

WORK REQUIREMENTS

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

Successful Proposer shall be expected to work closely with designated City personnel to accomplish the following essential components of the study which are likely to include:

a. Interview appropriate BOEC staff (Director, Operations Manager, Training Manager, Supervisors, etc.) to obtain an overview of day-to-day operations of BOEC.

b. Review labor contract and analyze how it impacts BOEC's ability to schedule.

c. Work with BOEC staff to collect relevant data and information relative to 9-1-1 operations.

d. Review current operations scheduling practices, work schedules, minimum staffing levels, and shift deployment schedules.

e. Review hours of overtime worked.

f. Review and analyze new-hire and ongoing training programs and delivery methods.

g. Review present training functions for effectiveness and efficiency; such as, the coordination and scheduling of initial and ongoing training.

h. Review the EMD system and applicable quality assurance program.

i. Perform a comprehensive assessment and evaluation of BOEC’s organization, infrastructure, and business processes as they relate to 9-1-1 operations.

j. Review the organizational structure and its implications for staffing. Take into account command and control, safety, and cost aspects, including overtime.

k. Review and analyze BOEC’s operations, along with historical data for effectiveness and efficiency, to consider such things as workload at various times of the day and week and scheduling of staff to meet the demands of the anticipated workload.

l. Review goals of objectives of BOEC’s management in relation to staffing and with regard to meeting partner agency and community expectations for service.

m. Evaluate programs and services in terms of necessity, efficiency, staffing, funding,
and responsiveness to partner agency and community needs.

n. Conduct a comprehensive analysis of BOEC’s current staffing levels (include filled and vacant positions).

o. Analyze shift deployment, work schedules, service levels, workload, and staffing – make recommendations for change where appropriate in order to maximize safety and efficiency.

p. Analyze the organizational structure of the bureau as it relates to accepted standards of organization theory and practice. Determine if the organizational structure complies with professionally accepted concepts, such as: unity of command; span of control; and the logical grouping of activities, functions, and organizational components.

q. Determine how many staff should be assigned to BOEC operations to provide acceptable service levels to meet the demands of the workload and community and partner agency expected levels of service.

r. Identify policies, procedures, or other factors that impede productivity and effectiveness.

s. Based on historical data and the current tenure of employees, project BOEC’s attrition for the next five to ten years.

t. Provide a projection of future workload and service demands and additional resources that would be required to meet that workload. Recommend ways to address those demands.

u. Define critical issues facing BOEC over the next five years. Analyze the impact of the anticipated issues.

v. Evaluate the effects of emerging trends in technology on the services BOEC delivers to the public and partner agencies.

w. Determine enhancements that may be justified in the future with regard to additional staffing and/or the modification to the organizational structure.

x. Recommend alternatives that will enable BOEC to deliver services in the most efficient and effective manner possible.

y. Identify and recommend any other organizational improvements that can be made to enhance BOEC’s operations.

z. Other relevant factors identified by proposer and/or BOEC management.

3. PROJECT REVIEWS

On a day-to-day basis, the progress of the work will be managed by the City’s Project Manager.

4. 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.portlandoregon.gov/brfs/37732?

Conduct of the study will be done in consultation with BOEC’s Project Manager. Deliverables for this project shall include a comprehensive and detailed written draft and final assessment report which includes at a minimum, but not limited to:

a. Executive Summary
b. Critical issues facing BOEC
c. Describe the current state of service delivery
d. Provide a complete review and analysis of organizational structure, staffing levels, and staffing requirements by function
e. Describe current staffing model using the current BOEC policies and employee contract
f. Describe current recruitment practices and testing
g. Review and analyze new hire training process, ongoing training, and career path development.
h. Analyze identified issues with detailed recommendations and strategies identifying steps to take for implementation
i. Create a database/spreadsheet containing the quantified results of the data collection that is organized in a manner so that the City will be able to query, summarize, and otherwise analyze data.
j. List any relevant out-of-scope factors found during the collection phase.
k. Develop a draft report by January 15, 2017:
   1) Submit draft to Project Manager and BOEC Director
   2) Provide organizational design recommendations
   3) Provide staffing redesign recommendations and possible models
   4) Provide training process improvement recommendations and strategies
   5) Provide future projection information regarding staffing, technology, business practices, etc.
   6) Provide and/or recommend a diagnostic tool, system of analysis and/or methodology that can be used by BOEC in the future for similar workplace analysis
l. Develop a final report by February 3, 2017
   1) Incorporate comments from Project Manager and BOEC Director into final report
   2) Aggregate all deliverables, specifically providing the results of the Proposer’s analysis and recommendations
   3) Overview of recommendations in final report
   4) Business case/Value assessment/Financial impact for organization design changes
   5) Business case/Value assessment/Financial impact for staffing changes
   6) Business case/Value assessment/Financial impact for training process changes
   7) Outline other benefits that might be realized across the organization
   8) Provide benchmark and best practice information
   9) Provide risk assessment for any/all modifications to current business practices

a. Provide written weekly project status reports showing progress of tasks, accomplishments during the previous week, tasks to be completed the following week; obstacles and problems, and steps being taken to solve the problem. Provide a final written report of recommendations and review with key stakeholders who will be identified by the City at a later date.
b. Provide a qualified person to present this report’s findings to BOEC’s management and/or City Council (assume 3 meetings).
c. Submit a Monthly Subconsultant Payment and Utilization Report by the 15th of each month with invoice (reference Part II, Section C.5 of the RFP).

All deliverables and resulting work products from this contract will become the property of the City of Portland. As such, the Consultant and any Subconsultants grant the City the right to copy and distribute (in any and all media and formats) project deliverables for regulatory, project certification/recognition, program development, public education, and/or for any purposes at the sole discretion of the City of Portland.

5. PLACE OF PERFORMANCE
Contract performance will take place primarily at the successful Proposer’s facility. On occasion and as appropriate, work will be performed at City facilities, a third-party location, or any combination thereof.

6. PERIOD OF PERFORMANCE
The City anticipates having the successful Proposer begin work immediately upon contract execution with submittal of final deliverables to the City occurring by January 31, 2017.

Proposals containing earlier completion of the deliverables are acceptable and encouraged.

7. ACH PAYMENTS
It is the City’s policy to pay its vendor invoices via electronic funds transfers through the automated clearing house (ACH) network. To initiate payment of invoices, vendors shall execute the City’s standard ACH Vendor Payment Authorization Agreement.

Upon verification of the data provided, the Payment Authorization Agreement will authorize the City to deposit payment for services rendered directly into vendor accounts with financial institutions. All payments shall be in United States currency.

8. PUBLIC SAFETY
Public safety may require limiting access to public works sites, public facilities, and public offices, sometimes without advance notice. The Proposer shall anticipate delays in such places and include the cost of delay in the proposed cost. The successful Proposer’s employees and agents shall carry sufficient identification to show by whom they are employed and display it upon request to security personnel. City project managers have discretion to require the successful Proposer’s employees and agents to be escorted to and from any public office, facility, or work site if national or local security appears to require it.

9. BUSINESS COMPLIANCE
The successful Proposer(s) must be in compliance with the laws regarding conducting business in the City of Portland before an award may be made. The Proposer shall be responsible for the following:

Certification as an EEO Affirmative Action Employer
The successful Proposer(s) must be certified as Equal Employment Opportunity Employers as prescribed by Chapter 5.33.076 of the Code of the City of Portland prior to contract award. Details of certification requirements is available from Procurement Services’ website under Contractor Resources.

Non-Discrimination in Employee Benefits (Equal Benefits)
The successful Proposer(s) must be in compliance with the City’s Equal Benefits Program as prescribed by Chapter 5.33.077 of the Code of the City of Portland prior to contract award. Details of certification requirements is available from Procurement Services’ website under Contractor Resources: Contractor Requirements.

Business Tax Registration
The successful Proposer(s) must be in compliance with the City of Portland Business Tax registration requirements as prescribed by Chapter 7.02 of the Code of the City of Portland prior to contract award. Details of compliance requirements is available on the
10. INSURANCE

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

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

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

**Automobile Liability Insurance:** Successful Proposer shall have automobile liability insurance with coverage of not less than $1,000,000 each accident, and an umbrella or excess liability coverage of $2,000,000. The insurance shall include coverage for any auto or all owned, scheduled, hired and non-owned auto. This coverage may be combined with the commercial general liability insurance policy.

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

**Additional Insurance:** Any insurance required by Federal Law or State Statute or City Code; such as Bailees Insurance, Maritime Coverage, or other coverage(s).

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

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

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

SECTION C

PROJECT PROVISIONS

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 on Procurement Services’ website under Contractor Resources.

4. ATTACHMENTS

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<th>Exhibit</th>
<th>Description</th>
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<td>Exhibit A</td>
<td>PTE Participation Disclosure Form 1</td>
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<td>Exhibit B</td>
<td>Organizational Chart</td>
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PART II

PROPOSAL PREPARATION AND SUBMITTAL

SECTION A

PRE-SUBMITTAL MEETING/CLARIFICATION

1. PRE-SUBMITTAL MEETING

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

2. RFP CLARIFICATION

Questions and requests for clarification regarding this Request for Proposal must be directed in writing, via email or fax, to the person listed below. The deadline for submitting such questions/clarifications is 7 days prior to the proposal due date. An addendum will be issued no later than 72 hours prior to the proposal due date to all recorded holders of the RFP if a substantive clarification is in order.

Laura Wolfe
E-mail: laura.wolfe@portlandoregon.gov

SECTION B

PROPOSAL SUBMISSION

1. PROPOSALS DUE

Sealed proposals must be received no later than the date and time, and at the location, specified on the cover of this solicitation. The outside of the envelope shall plainly identify the subject of the proposal, the RFP number, and the name and address of the Proposer. It is the Proposer’s responsibility to ensure that proposals are received prior to the specified closing date and time, and at the location specified. Proposals received after the specified closing date and/or time shall not be considered and will be returned to the Proposer unopened. The City shall not be responsible for the proper identification and handling of any proposals submitted to an incorrect location.

2. PROPOSAL

Proposals must be clear, succinct and not exceed 15 pages. Section dividers, title page, table of contents, cover letter, and the PTE Participation Disclosure Form 1 do not count in the overall page count of the proposal. Proposers who submit more than the pages indicated may not have the additional pages of the proposal read or considered. For purposes of review and in the interest of the City's Sustainable Paper Use Policy and sustainable business practices in general, the City requests the use of submittal materials (i.e. paper, envelopes, etc.) that contain post-consumer recycled content and are readily recyclable. Submittals shall NOT include 3-ring binders or any plastic binding, folders, or indexing materials. Reusable binding posts, clips or rings and recycled content paper envelopes or folders are examples of acceptable bindings. Submittals shall be printed on both sides of a single sheet of paper wherever applicable; if sheets are printed on both sides, it is considered to be two pages. Color is acceptable, but content should not be lost by black-and-white printing or copying.

All submittals will be evaluated on the completeness and quality of the content. Only those Proposers providing complete information as required will be considered for evaluation. The ability to follow these instructions demonstrates attention to detail.

3. PROPOSAL SUBMISSION

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

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

When preparing a redaction of your proposal submission, a proposer must plainly mark the redactions by obscuring the specific areas your firm asserts are exempt from public disclosure. In addition, a summary page identifying the pages where redactions occur shall be included with the proposal submission (summary is not included in page limitations. If a proposer fails to submit a redacted copy of their proposal as required, the City may release the proposer's original proposal without redaction. If the entire proposal is marked as constituting a “trade secret” or being “confidential”, at the City’s sole discretion, such a proposal may be rejected as non-responsive.

Unless expressly provided otherwise in this RFP or in a separate written communication, the City does not agree to withhold from public disclosure any information submitted in confidence by a proposer unless the information is otherwise exempt under Oregon law. The City agrees not to disclose proposals until the City has completed its evaluation of all proposals and publicly announces the results.

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

4. COST OF RESPONDING
All costs incurred by the Proposer in preparation of proposals to this solicitation, including presentations to the City and/or for participation in an interview shall be borne solely by the Proposer; the City shall not be liable for any of these costs. At no time will the City provide reimbursement for submission of a proposal unless so stated herein.

5. ORGANIZATION OF PROPOSAL
Proposers must provide all information as requested in this Request for Proposal (RFP). Proposals must follow the format outlined in this RFP. Additional materials in other formats or pages beyond the stated page limit(s) may not be considered. The City may reject as non-responsive, at its sole discretion, any proposal or any part thereof, which is incomplete, inadequate in its response, or departs in any substantive way from the required format. Proposals shall be organized in the following manner:

1. Cover Letter
2. Project Team
3. Proposer’s Capabilities
4. Project Approach and Understanding
5. Corporate Responsibility
6. Proposed Cost
7. Supporting Information
8. A completed PTE Participation Disclosure Form 1 (refer to Part II.C.5)

SECTION C EVALUATION CRITERIA

1. COVER LETTER

By Submitting a proposal, the Proposer is accepting the General Instructions and Conditions of this Request for Proposal (reference second page of the RFP), the stated insurance coverage and limitations, and the Standard Contract Provisions of the Professional, Technical, and Expert Services contract. Any exceptions to the requirements or requests for waivers MUST be included in the proposal Cover Letter or they will not be considered.

The Cover Letter must include the following:

• RFP number and project title (RFP #384)
2. PROJECT TEAM

Please provide the following:

- Approximate number of people to be assigned to the project. Proposer must have the resources to complete this project within the timeline.
- Extent of company’s principal member’s involvement.
- Names of key personnel who will be performing the work on this project, and:
  - their roles and responsibilities on this project
  - current assignments and location
  - directly relevant experience on similar or related projects
  - unique qualifications
  - demonstrated performance record of key personnel
  - percentage of their time that will be devoted to the project

Provide a professional resume for each key personnel, including key personnel of any Subconsultant(s) proposed to be assigned to the project. Resumes shall include educational background, professional development, and demonstrate that the individual(s) meets the qualification and experience requirements for performing the work as outlined in this RFP.

- Proposals must identify a proposed project manager who would be responsible for the day-to-day management of project tasks and would be the primary point of contact with your firm. Describe the project manager’s experience with similar projects and with managing and leading interdisciplinary teams. List other projects the proposed project manager is currently assigned to.

- Team qualifications and experience on similar or related projects:
  - qualifications and relevant experience of prime consultant
  - qualifications and relevant experience of sub-consultants, if any

3. PROPOSER’S CAPABILITIES

- Describe your firm’s legal structure, areas of expertise, length of time in business, number of employees, and other information that would be helpful in characterizing the firm. Provide the same information for any subconsultants to be utilized on the project.
- Provide the address of the firm’s home office and the address of the office that will manage the project, if applicable.
- Describe similar projects performed within the last 3 years, which best characterize firm’s capabilities, work quality and cost control. At least one project shall highlight the sustainability aspects of the project, such as, but not limited to, energy efficiency, waste minimization, transportation emissions reductions, resource use reductions,
or locally sourced inputs.

- For each project mentioned, include the name, address and phone number of a person who can be contacted regarding your performance on the project. When submitting projects for which your firm worked in an auxiliary capacity or in a joint venture or partnership, include the name of the lead firm.

- Describe similar projects with other government agencies.

- Describe firm’s resources available to perform the work for the duration of the project and other on-going projects.

- Describe firm’s internal procedures and/or policies associated or related to work quality and cost control.

- Describe firm’s management and organizational capabilities.

- Provide a detailed description of firm’s ability to meet BOEC’s aggressive timeline and to make the project come to fruition quickly.

- Describe firm’s approach to overall management and integration of activities required by the scope of work, including the management of objectives and techniques that demonstrate how the work requirements will be met. Include organizational charts, a statement regarding how the Proposer is prepared to respond promptly to problems and changes to scope of work.

4. PROJECT APPROACH AND UNDERSTANDING

For each phase of work, the project approach should:

- Describe the proposed work tasks and activities, and provide a narrative description of how the firm proposes to execute the tasks during each phase of the project.

- Identify the team members who will work on each task.

- Describe the proposed work products that will result from each task or activity.

- Identify points of input and review with City staff.

- Based on your firm’s expertise and experience with similar projects, demonstrate how your firm will effectively complete the proposed project within the timeline specified or propose a timeline you believe is achievable for an effective completion.

- Identify the time frame estimated to complete each task.

If applicable, discuss any unique aspects of the project, alternative approaches the City might wish to consider or special considerations related to programmatic/funding requirements. Please also discuss how your firm or team would incorporate energy efficient technologies as applicable such as: premium-efficiency motors; energy-efficient pumps, blowers, compressors and lighting. Please also assume that for all applicable parts of this project your firm or team would provide documentation necessary for the City to apply for energy efficiency incentives available through the Energy Trust of Oregon and the State of Oregon Business Energy Tax Credit program.

5. CORPORATE RESPONSIBILITY

Through the adoption of The Portland Plan, the Social Equity Contracting Strategy and Sustainable Procurement Policy, the Portland City Council has shown its commitment to contracting with socially and environmentally responsible businesses. The City values and supports diversity and is dedicated to advancing equity in public contracting by increasing opportunities for State of Oregon certified Minority, Women and Emerging Small Business enterprises (“M/W/ESB”).

The Social Equity Contracting Strategy promotes M/W/ESB economic growth and encourages partnering and mentoring between large and small M/W/ESB firms on City PTE contracts. Therefore, the City has established an overall aspirational goal of 20% in awarding PTE prime consultant and subconsultant contracts to State of Oregon certified M/W/ESB firms. Proposing firms are encouraged to use the State’s OMWESB website for identifying potential M/W/ESB subconsultants.

All Proposers shall address the following in their proposals:

RFP # 384 (BOEC009)
a. **Oregon State Certification**  
Please indicate in your response if your firm is currently certified in the State of Oregon as an MBE, WBE, or an ESB.

b. **Minority, Women and Emerging Small Business Contracting**  
   - If your firm is acting as the prime consultant or utilizing subconsultants on this project, please list the total project contract amount including scopes of work on Form 1(PTE Participation Disclosure Form).  
   - Points will be awarded based upon the maximum dollars contracted with State of Oregon certified M/W/ESB prime and/or subconsultants.  
   
   *Note: Failure to submit Form 1 with your proposal may result in the proposal being found non-responsive and may be rejected.*

c. **Workforce Diversity and Community Involvement**  
   - Describe your firm’s workforce demographics and any measurable steps taken to ensure a diverse internal workforce (e.g., women and people of color).  
   - How do you approach internal on the job training, mentoring, technical training, and/or professional development opportunities for women and people of color?  
   - Describe your firm’s employee compensation structure, (e.g., living wages, healthcare coverage, employee leaves, dependent care, etc.).  
   - Describe your firm’s commitment to community service, (e.g., charitable programs, scholarships, economic development, etc.)

d. **Sustainable Business Practices**  
   - List the top five actions/ongoing practices your firm has implemented to reduce the environmental impacts of your operations (e.g., energy efficiency, use of recycled content or non-toxic products, use of public transit or alternative fuel vehicles, waste prevention and recycling, water conservation, green building practices, etc.).  
   - Regarding your top five actions, please reference implementation dates, timelines, and any performance metrics or third-party awards/recognition.  
   - Does your firm participate in any third-party sustainability related organizations, networks, or committees? If so, list up to five examples and how long your firm has been an active participant in each.

The City expects thoughtful consideration of all of the above Corporate Responsibility criteria in the preparation of proposals. The City will enforce all M/W/ESB commitments submitted by the successful Proposer. The successful Proposer will be required to submit a completed Monthly Subconsultant Payment and Utilization Report to ensure that subconsultants are utilized to the extent proposed and submitted in the original proposal. The successful Proposer will not be permitted at any time to substitute, delete, or add a subconsultant without the prior written approval of the Chief Procurement Officer. A copy of the Subconsultant Change Request Form can be found on Procurement Services’ website under Contractor Resources.

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.
PART III

SECTION A

1. EVALUATION CRITERIA

PROPOSAL EVALUATION

PROPOSAL REVIEW AND SELECTION

A Selection Review Committee (Committee) will be appointed to evaluate the proposals received. For the purpose of scoring proposals, each Committee member will evaluate each proposal in accordance with the criteria listed in Part II, Section C. The Committee may seek the assistance of outside expertise, including, but not limited to, technical advisors. The Committee will require a minimum of ten (10) working days to evaluate and score the proposals.

The choice of how to proceed, decisions to begin or terminate negotiations, determination of a reasonable time, decisions to open negotiations with a lower scoring Proposer, and any decision that a solicitation should be cancelled are all within the sole discretion of the City.

The proposal evaluation process consists of a series of Evaluation Levels that will lead to the identification of a Successful Proposer. Each proposal response will be evaluated in accordance with the following evaluation criteria:

Evaluation Level #1 – Written Scoring: Proposals meeting the mandatory and responsiveness requirements will be further evaluated as part of Evaluation Level #1. One hundred possible points are available at Level #1. This step consists of a detailed review of the responses as follows:

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Maximum Level #1 Score</th>
<th>Point Distribution by Subsection</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. COVER LETTER</td>
<td></td>
<td>REQUIRED</td>
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<tr>
<td>2. PROJECT TEAM</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>3. PROPOSER'S CAPABILITIES</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>4. PROJECT APPROACH</td>
<td>25</td>
<td></td>
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<tr>
<td>5. CORPORATE RESPONSIBILITY</td>
<td>20</td>
<td></td>
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<tr>
<td>OR State Certification</td>
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<td>4</td>
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<tr>
<td>MWESB Contracting</td>
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<td>8</td>
</tr>
<tr>
<td>Workforce Diversity &amp; Community</td>
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<td>3</td>
</tr>
<tr>
<td>Involvement</td>
<td></td>
<td>5</td>
</tr>
<tr>
<td>Sustainable Business Practices</td>
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<td></td>
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<tr>
<td>6. PROPOSED COST</td>
<td>15</td>
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<tr>
<td>TOTAL:</td>
<td></td>
<td>100</td>
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</table>

Evaluation Level #2 – Oral Scoring: If oral interviews or presentations are determined to be necessary, this next step will consist of oral presentations and further clarification of the Proposer’s response. The number of proposals on the “short list” depends on whether the Committee believes such proposals have a reasonable chance of leading to the award of a contract. Proposers invited to participate in Evaluation Level #2 will be given additional information regarding the City’s desired content a reasonable time before the scheduled Evaluation Level #2 oral interviews/presentations are held. The scoring of the Level #2 will be as follows:
**Level #2 ORAL Evaluation Criteria**

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Maximum Level #2 Score</th>
<th>Point Distribution by Subsection</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. PROJECT TEAM’S QUALIFICATIONS FOR CONDUCTING A 911 STAFFING STUDY</td>
<td>15</td>
<td></td>
</tr>
<tr>
<td>2. PROPOSER’S CAPABILITY TO UNDERSTAND BOEC’S UNIQUE 911 STAFFING NEEDS</td>
<td>25</td>
<td></td>
</tr>
<tr>
<td>3. PROPOSER’S DEMONSTRATED EXPERIENCE WITH SIMILAR 911 STAFFING STUDY PROJECTS</td>
<td>15</td>
<td></td>
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<tr>
<td>4. PROPOSER’S CAPABILITY TO ANALYZE BOEC’S STATISTICAL DATA AND MAKE RECOMMENDATIONS</td>
<td>30</td>
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<tr>
<td>5. KNOWLEDGE OF EMERGING TRENDS AND TECHNOLOGY AFFECTING THE 911 INDUSTRY</td>
<td>15</td>
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<tr>
<td><strong>TOTAL:</strong></td>
<td><strong>100</strong></td>
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</tbody>
</table>

All communications shall be through the contact(s) referenced in Part II, Section A.2 of the RFP. At the City's sole discretion, communications with members of the evaluation committee, other City staff, or elected City officials for the purpose of unfairly influencing the outcome of this RFP may be cause for the Proposer’s proposal to be rejected and disqualified from further consideration.

The City has the right to reject any or all proposals for good cause in the public interest, and the Chief Procurement Officer may waive any evaluation irregularities that have no material effect on upholding a fair and impartial evaluation selection process.

**NOTE:** In the City’s discretion, litigation between the City and a Proposer may be cause for proposal rejection, regardless of when that litigation comes to the City’s attention and regardless how the Proposer’s proposal may have been scored. Proposals may also be rejected if they use subcontractors or subconsultants who are involved in litigation with the City. Proposers who are concerned about possible rejection on this basis should contact the City before submission of a proposal for a preliminary determination of whether its proposal will be rejected.

### 2. SCORING PROCESS

For Evaluation Level #1, the sum of all points earned by a Proposer from all proposal evaluators will be the Overall Score for Level #1. The Evaluation Committee may choose to focus on only a limited number of proposals by developing a “short list” to move on to Evaluation Level #2 based on the scores from the written proposals. Or they may choose to proceed directly to contract negotiation and award.

If Proposers move to Evaluation Level #2, then the proposal scores from Level #1 will not be used during the oral interview/presentation process and they will be scored based on the Level #2 criteria alone. Following completion of the Evaluation Level #2 scoring, each Proposer’s Evaluation Level #2 score will be added to their Evaluation Level #1 score to determine their Total Overall Score. The highest scoring proposal, based on their Total Overall Score, may be identified as the Successful Proposer.

### 3. CLARIFYING PROPOSAL DURING EVALUATION

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

1. CONSULTANT SELECTION

CONTRACT AWARD

Following the Evaluation Committee’s final determination of the highest scored Proposer, the City will issue a Notice of Intent to Negotiate and Award and begin contract negotiations. The City will attempt to reach a final agreement with the highest scoring Proposer. However, the City may, in its sole discretion, terminate negotiations and reject the proposal if it appears agreement cannot be reached. The City may then attempt to reach a final agreement with the second highest scoring Proposer and may continue on, in the same manner, with remaining proposers until an agreement is reached. A consultant selection process will be carried out under Portland City Code Chapter 5.68.

The selection of the Successful Proposer shall be based on negotiated costs and conformance to the City’s terms and conditions. Negotiations will follow with the successful Proposer, and if successful, the consultant and City will enter into a service contract for the work. If the contract with the successful Proposer cannot be reached within a time period deemed reasonable to the City, the City may elevate any of the proposers that were identified on the short list.

2. CONTRACT DEVELOPMENT

The proposal and all responses provided by the successful Proposer may become a part of the final contract. Any information included as part of this contract shall be a public record and not exempt from disclosure, including items redacted from the proposal. The form of contract shall be the City’s Contract for PTE Services.

For contracts over $100,000, the evaluation committee’s recommendation for contract award will be submitted to the Portland City Council for approval.

3. REVIEW AND PROTESTS

REVIEW:

Following the Notice of Intent to Negotiate and Award, the public may view proposal documents. However, any proprietary information so designated by the Proposer as a trade secret or confidential and meeting the requirements of ORS 192.501, 192.502 and/or ORS 646.461 et seq., will not be disclosed unless the Multnomah County District Attorney determines that disclosure is required. At this time, Proposers not awarded the contract may seek additional clarification or debriefing, request time to review the selection procedures or discuss the scoring methods utilized by the evaluation committee.

PROTESTS:

Proposers who are eliminated at any stage of the evaluation process will be notified of their elimination. At that time, Proposers who wish to protest their elimination shall file a protest within seven (7) calendar days of the notice. Protests may be submitted to the Chief Procurement Officer for this formal solicitation only from those Proposers who would receive the contract if their protest was successful.

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

Protests must be timely and must include all legal and factual information regarding the protest, and a statement of the form of relief requested. Protests received later than specified or from other than the Proposer who would receive the contract if the protest was successful will not be considered. The exercise of judgment used by the evaluators in scoring the written proposals and interviews, including the use of outside expertise, is not grounds for appeal.
The Chief Procurement Officer may waive any procedural irregularities that had no material effect on the selection of the proposed consultant, invalidate the proposed award, amend the award decision, request the evaluation committee re-evaluate any proposal or require the Bureau to cancel the solicitation, and begin again to solicit new proposals. In the event the matter is returned to the evaluation committee, the Chief Procurement Officer shall issue a notice canceling the Notice of Intent to Negotiate and Award.

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

4. KICK-OFF MEETING

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

The City’s disclosure program was adopted to document the utilization of Oregon certified Minority, Women and Emerging Small Businesses (M/W/ESBs) on City projects.

This Request for Proposal (RFP) requires submission by the Proposer of the PTE Participation Disclosure Form 1. The Proposer must disclose the following information:

1) Contact information and Employer Identification Number (EIN or FED ID#) for all contract participants
2) State of Oregon M/W/ESB designation
   (Verify current certification status with the Office of Minority, Women, and Emerging Small Business)
3) The proposed scope or category of work that the Proposer and any subconsultants will be performing
4) The dollar amount of the Proposer’s self-performing work and of all subconsultants’ contract(s)
5) Percentage of total contract amount allocated to Oregon certified M/W/ESB participation

Report all amounts in United States Dollars (USD). The use of ‘TBD’, ‘N/A’, or similar symbols is not acceptable. All requested information must be provided.

If the Proposer will not be using any subconsultants, the Proposer is still required to enter its own information in the appropriate section and to indicate “NONE” in the subconsultant section of the accompanying form and submit the form with its proposal.

FAILURE TO SUBMIT THE PTE PARTICIPATION DISCLOSURE FORM 1 WITH THE PROPOSAL MAY RESULT IN THE PROPOSAL BEING FOUND NON-RESPONSIVE AND REJECTED FROM CONSIDERATION
CITY OF PORTLAND
PTE PARTICIPATION DISCLOSURE FORM 1

This Request for Proposal requires submission by the Proposer of this PTE Participation Disclosure Form 1. Proposers must disclose the following information:

Please print all information clearly.

Proposer Name: ___________________________ Proposer’s Total Cost: $ __________

Project Name: _______________________________ RFP Number: __________

Contact Name: ___________________________ Phone: ___________ Email: __________

<table>
<thead>
<tr>
<th>Percentage of total contract amount allocated to Oregon certified M/W/ESB participation</th>
<th>(Proposer &amp; Subconsultant added together)</th>
<th>%</th>
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<tr>
<td><strong>PROPOSER INFORMATION</strong> (Please Print)</td>
<td>M/W/ESB</td>
<td>SCOPE / TYPE OF WORK</td>
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<td>FED ID OR EIN # (No SS#):</td>
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<tr>
<th><strong>SUBCONSULTANT INFORMATION</strong> (Please Print)</th>
<th>M/W/ESB</th>
<th>SCOPE / TYPE OF WORK</th>
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NOTE:
1) Report all amounts in US Dollars (USD); using ‘TBD’, ‘N/A’, or similar symbols is not acceptable.
2) The Proposer and all subconsultants must be listed on this form. Leave M/W/ESB column blank if firm is not confirmed as currently certified through the State of Oregon Office of Minority, Women, and Emerging Small Business.
3) If the Proposer will not be using any subconsultants, the Proposer is required to indicate “NONE” in the Subconsultant Information section of this form and submit this form with its proposal.
4) Do not enter Social Security numbers on this form.

Failure to submit this form with the proposal may result in the proposal being found non-responsive and rejected.