

BEFORE THE COUNCIL OF THE  
METROPOLITAN SERVICE DISTRICT

FOR THE PURPOSE OF AWARDING ) RESOLUTION NO. 89-1124  
A TWO-YEAR CONTRACT TO COATES )  
ADVERTISING AND PUBLIC RELATIONS ) Introduced by Rena Cusma,  
TO DESIGN AND IMPLEMENT PORTIONS ) Executive Officer  
OF THE PUBLIC EDUCATION AND )  
PROMOTION PROGRAM FOR THE SOLID )  
WASTE REDUCTION PROGRAM. )

WHEREAS, the Metropolitan Service District (Metro) desires to utilize the services of an advertising agency in implementing the Promotion, Education and Public Involvement Program within the Waste Reduction Program; and

WHEREAS, the Council has approved an annual budget of \$250,000 each year for FY 1989-90 and FY 1990-91 to contract with an advertising and public relations agency;

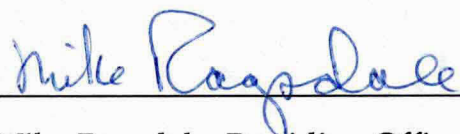
WHEREAS, the Council has authorized the Executive Officer to execute the contract with the agency selected through an approved solicitation and evaluation process, as presented in the Staff Report attached hereto;

WHEREAS, Coates Advertising and Public Relations was the agency selected through that process; now, therefore,

BE IT RESOLVED,

1. That the Executive Officer is authorized to execute a contract with Coates Advertising and Public Relations to design and implement portions of the promotion and public education program of the Waste Reduction Program, in a form substantially similar to attached Exhibit A in an amount not to exceed \$500,000.

ADOPTED by the Council of the Metropolitan Service District this 8<sup>th</sup>  
day of August, 1989.



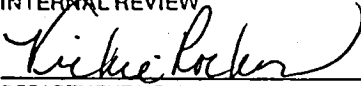
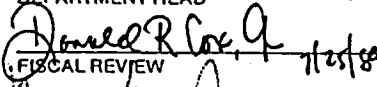

Mike Ragsdale, Presiding Officer



1. A. APPROVED BY STATE/FEDERAL AGENCIES?  YES  NO  NOT APPLICABLE  
 B. IS THIS A DOT/UMTA/FHWA ASSISTED CONTRACT  YES  NO
11. IS CONTRACT OR SUBCONTRACT WITH A MINORITY BUSINESS?  YES  NO  
 IF YES, WHICH JURISDICTION HAS AWARDED CERTIFICATION WBE
12. WILL INSURANCE CERTIFICATE BE REQUIRED?  YES  NO
13. WERE BID AND PERFORMANCE BONDS SUBMITTED?  YES  NOT APPLICABLE  
 TYPE OF BOND \_\_\_\_\_ AMOUNT \$ \_\_\_\_\_  
 TYPE OF BOND \_\_\_\_\_ AMOUNT \$ \_\_\_\_\_
14. LIST OF KNOWN SUBCONTRACTORS (IF APPLICABLE)
- |                 |               |                              |
|-----------------|---------------|------------------------------|
| NAME <u>N/A</u> | SERVICE _____ | <input type="checkbox"/> MBE |
| NAME _____      | SERVICE _____ | <input type="checkbox"/> MBE |
| NAME _____      | SERVICE _____ | <input type="checkbox"/> MBE |
| NAME _____      | SERVICE _____ | <input type="checkbox"/> MBE |
15. IF THE CONTRACT IS OVER \$10,000  
 A. IS THE CONTRACTOR DOMICILED IN OR REGISTERED TO DO BUSINESS IN THE STATE OF OREGON?  
 YES  NO  
 B. IF NO, HAS AN APPLICATION FOR FINAL PAYMENT RELEASE BEEN FORWARDED TO THE CONTRACTOR?  
 YES DATE \_\_\_\_\_ INITIAL \_\_\_\_\_

16. COMMENTS:

## GRANT/CONTRACT APPROVAL

<p>INTERNAL REVIEW            DEPARTMENT HEAD</p> <p>FISCAL REVIEW            11/21/89</p> <p>BUDGET REVIEW            7-25-89</p>	<p>CONTRACT REVIEW BOARD          (IF REQUIRED) DATE _____</p> <p>1. _____          COUNCILOR</p> <p>2. _____          COUNCILOR</p> <p>3. _____          COUNCILOR</p>	<p>COUNCIL REVIEW          (IF REQUIRED)          _____          DATE</p>
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LEGAL COUNSEL REVIEW AS NEEDED:

- A. DEVIATION TO CONTRACT FORM \_\_\_\_\_
- B. CONTRACTS OVER \$10,000 \_\_\_\_\_
- C. CONTRACTS BETWEEN GOVERNMENT AGENCIES \_\_\_\_\_

Contract No. \_\_\_\_\_

PERSONAL SERVICES AGREEMENT

THIS AGREEMENT dated this \_\_\_\_\_ day of \_\_\_\_\_ 19\_\_\_\_, is between the METROPOLITAN SERVICE DISTRICT, a municipal corporation, hereinafter referred to as "METRO," whose address is 2000 S.W. First Avenue, Portland, OR 97201-5398, and COATES ADVERTISING & P.R., hereinafter referred to as "CONTRACTOR," whose address is 115 SW Ash, #323 Portland, OR 97204, for the period of August, 1989, through June 30, 1991, and for any extensions thereafter pursuant to written agreement of both parties.

W I T N E S S E T H :

WHEREAS, This Agreement is exclusively for Personal Services;

NOW, THEREFORE, IT IS MUTUALLY AGREED AS FOLLOWS:

CONTRACTOR AGREES:

1. To perform the services and deliver to METRO the materials described in the Scope of Work attached hereto;
2. To provide all services and materials in a competent and professional manner in accordance with the Scope of Work;
3. To comply with all applicable provisions of ORS Chapters 187 and 279, and all other terms and conditions necessary to be inserted into public contracts in the state of Oregon, as if such provisions were a part of this Agreement;



2. To provide full information regarding its requirements for the Scope of Work.

BOTH PARTIES AGREE:

1. That METRO may terminate this Agreement upon giving CONTRACTOR five (5) days written notice without waiving any claims or remedies it may have against CONTRACTOR;

2. That, in the event of termination, METRO shall pay CONTRACTOR for services performed and materials delivered prior to the date of termination; but shall not be liable for indirect or consequential damages;

3. That, in the event of any litigation concerning this Agreement, the prevailing party shall be entitled to reasonable attorney's fees and court costs, including fees and costs on appeal to an appellate court;

4. That this Agreement is binding on each party, its successors, assigns, and legal representatives and may not, under any condition, be assigned or transferred by either party; and

5. That this Agreement may be amended only by the written agreement of both parties.

CONTRACTOR NAME

METROPOLITAN SERVICE DISTRICT

By: \_\_\_\_\_

By: \_\_\_\_\_

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

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

initials  
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## SCOPE OF WORK

A. The Contractor will analyze solid waste and recycling market research prepared for Metro. This analysis will be reviewed with key staff and used as the basis for campaign development.

B. The Contractor will develop a minimum of two public education campaigns each year. First year campaigns will be aimed at building awareness of existing recycling opportunities for yard debris, office paper and other materials. Second year campaigns will promote newly developed recycling and waste reduction programs in the areas of yard debris, office paper and possibly scrap lumber. The Contractor will identify opportunities for cooperative promotions, special events, community outreach and other public relations elements as appropriate.

C. The Contractor will conceive, write, design, produce and place all print and broadcast materials. In most cases, Metro's internal graphics department will produce collateral materials, although the Contractor may be asked to provide creative direction. In order to bill Metro for services, the Contractor must obtain approval on all materials written or produced in concept development, draft, pre-production and final phases.

D. In addition to the time required to produce these materials, the Contractor will provide up to eight hours consultation each month on public relations activities called for in the plan.

E. The Contractor will provide Metro with the following on a monthly basis: project progress reports, year-to-date budget updates and billings. In addition, a written summary of any client/agency meeting will be sent to Metro following the meeting. The Contractor and the project manager, Metro's Public Affairs Director, will meet periodically to evaluate progress of campaigns being implemented.

F. The Contractor will develop programs that maximize the annual budget of \$250,000. This figure includes agency fees, out-of-pocket expenses, and all materials, production and media costs.

G. In the event that any subconsultants are to be used in the performance of this agreement, the Contractor will reach Metro's goals of subcontracting 7 percent of the contract amount to Disadvantaged Businesses (DBEs) and 5 percent of the contract amount to Women-owned Businesses (WBEs) or make a good faith

effort, as that term is defined in Metro's Disadvantaged Business Program, Section 2.04.160, Subsection (b) of the Metro Code (Attachment C), to meet those goals.

A subconsultant is any person or firm proposed to work for the prime consultant on this project. Metro does not wish any subconsultant selection to be finalized prior to contract award. For any task or portion of a task to be undertaken by a subconsultant, the prime consultant shall not sign up a subconsultant on an exclusive basis. The consultant must assume responsibility for any subconsultant work and be responsible for the day-to-day direction and internal management of the consultant effort.

The Contractor will contact Metro prior to negotiating any subcontracts. Metro reserves the right, at all times during the period of this agreement, to monitor compliance with the terms of this paragraph and Metro's Disadvantaged Business Program.



SOLID WASTE COMMITTEE REPORT

RESOLUTION NO. 89-1124, FOR THE PURPOSE OF AWARDING A TWO-YEAR CONTRACT TO COATES ADVERTISING AND PUBLIC RELATIONS TO DESIGN AND IMPLEMENT PORTIONS OF THE PUBLIC EDUCATION AND PROMOTION PROGRAM FOR THE SOLID WASTE REDUCTION PROGRAM

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Date: August 2, 1989

Presented by: Councilor  
Hansen

Committee Recommendations: The Solid Waste Committee voted 3 to 0 to recommend Council adoption of Resolution No. 89-1124. Voting aye: Councilors Hansen, Buchanan and DeJardin. Absent: Councilors Ragsdale and Wyers. This action taken August 1, 1989.

Committee Discussion/Issues: The Public Affairs staff presented the details regarding the purpose of the proposed contract, the scope of work, the selection process, and criteria, and the budget for the Waste Reduction Program public education campaigns.

The contract will support a two-year effort to motivate the public to increase recycling and reduce waste.

The Coates Advertising and Public Relations firm was recommended for the contract by the evaluation committee. The evaluation committee liked Coate's record for the Waste Reduction Program in the last three years; their ideas for promoting office paper recycling and the strength of their account team. Coates is a registered WBE business and has agreed to reach, or make a good faith effort to reach, the Disadvantaged Business subcontracting goals in the event any subconsultants are to be sued in the performance of the contract.

The Solid Waste Committee asked what the goal was for office paper reduction. Staff indicated that the goal was a 50 percent increase in office paper recycling.

The Solid Waste Committee stressed that they want to see improved recycling markets as a result of the proposed contract.

GH:RB:pa  
A:RAYB.100

## STAFF REPORT

CONSIDERATION OF RESOLUTION NO. 89-1124 FOR THE PURPOSE OF AWARDING A TWO-YEAR CONTRACT TO COATES ADVERTISING AND PUBLIC RELATIONS TO DESIGN AND IMPLEMENT PORTIONS OF THE PUBLIC EDUCATION AND PROMOTION PROGRAM FOR THE SOLID WASTE REDUCTION PROGRAM.

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Date: July 20, 1989

Presented by: Vickie Rocker

### FACTUAL BACKGROUND AND ANALYSIS

#### Purpose of Contract

This contract is required to implement the promotion and public education component of the Solid Waste Reduction Program. The contract will support a comprehensive, two-year effort to motivate the public to increase recycling and reduce waste. The objectives of the public education program are attached (see Attachment A).

#### Contract Scope of Work

The contractor will use solid waste and recycling market research prepared for Metro as the basis for developing a comprehensive plan and a minimum of two campaigns each year. First year campaigns will focus on building awareness of and participation in office paper, yard debris and general recycling. These areas will also be emphasized in the second year, with the addition of any newly developed programs. In addition to developing television, radio, print and direct mail advertising, the contractor will identify opportunities for cooperative promotions, special events, community outreach and other public relations elements as appropriate.

#### Selection Process

##### 1. Request for Proposals

A request for proposals was distributed to 35 firms beginning June 7, 1989. Advertisements were placed in the Oregonian, the Daily Journal of Commerce and the Skanner. Notification was sent to disadvantaged businesses. Thirteen firms submitted proposals on June 29, 1989.

##### 2. Preliminary Screening

The three-member screening committee consisted of Metro staff from the Public Affairs Department and the zoo. Each proposal was evaluated according to the following criteria:

- 20% Approach: Understanding objectives and use of appropriate methodology.
- 20% Staff: Relevant experience.
- 50% Past Work: Creativity, quality, results and responsiveness to client needs.
- 10% Cost: Ability to work within the budget and schedule.

After client references were checked, the four firms that scored highest were selected for the interview stage of evaluation. Nine firms were eliminated because of weak past work, limited relevant experience and/or failure to adequately address approach.

### 3. Interviews

Interviews were held July 11 with the following firms: Adams, McKinney and Johnson; Coates Advertising and Public Relations; L.A. Advertising; and Whitman Advertising and Public Relations. The five-member interview committee consisted of representatives from Metro's Solid Waste and Public Affairs Departments, the Metro Washington Park Zoo and the Port of Portland.

Firms were asked to address six specific points in their presentations. The committee evaluated each proposer according to the following criteria:

- 10% Company philosophy.
- 10% Client relations and service.
- 20% Strengths of the account team members.
- 30% Relevant, creative and effective past work.
- 20% Understanding of our objectives as demonstrated in ideas for a fall campaign.
- 10% Ability and willingness to maximize the budget.

The committee judged that two of the firms, Coates and L.A., made the most convincing presentations. Each demonstrated a good understanding of the program's objectives, an ability to produce creative, effective work and a sound approach to performing the services.

These two firms returned for second interviews with the Executive Officer and Executive Management and Public Affairs staff on July 18.

### 4. Selection

After reviewing written proposals, holding two rounds of interviews and checking references for the two finalists, the second interview team decided to recommend Coates for the contract. Among the factors taken into account in the final decision was Coates' track record for the Waste Reduction Program in the last three years, their ideas for promoting office paper recycling and the strength of their account team. Coates is a registered WBE business and has agreed to reach, or make a good faith effort to reach, the Disadvantaged Business Program subcontracting goals in the event any subconsultants are to be used in the performance of the contract.

## **Budget**

The Metro Council has approved an annual budget of \$250,000 for an advertising and public relations consultant to implement Waste Reduction Program public education campaigns during FY 1989-90. Coates has prepared a preliminary work plan within the fixed budget parameters. The year two budget for FY 1990-91 has also been set at \$250,000.

## **EXECUTIVE OFFICER'S RECOMMENDATION**

The Executive Officer recommends adoption of Resolution 89- 1124.

## Attachment A

### CAMPAIGN OBJECTIVES

1. Continue to build awareness of and increase participation in curbside recycling.
2. Build awareness of office paper and corrugated cardboard recycling opportunities with businesses in the region and increase participation in office paper recycling programs.
3. Build awareness of yard debris recycling opportunities and promote participation in yard debris recycling programs.
4. Raise visibility for the Recycling Information Center and increase calls by 10%.
5. Build awareness of and participation in other waste reduction programs that may be developed within the contract period.
6. Reduce quantities of office paper and corrugated cardboard, yard debris, curbside recyclables and other items present in the waste stream.