

BEFORE THE CONTRACT REVIEW BOARD  
OF THE METROPOLITAN SERVICE DISTRICT

FOR THE PURPOSE OF AUTHORIZING AN ) RESOLUTION NO. 90-1201  
EXEMPTION TO METRO CODE CHAPTER )  
2.04.043 COMPETITIVE BIDDING )  
PROCEDURES AND AUTHORIZING A SOLE ) Introduced by Rena Cusma,  
SOURCE AGREEMENT WITH DUN & ) Executive Officer  
BRADSTREET CORP. FOR THE PURCHASE )  
OF CREDIT REPORTING SERVICES )

WHEREAS, Metropolitan Service District Code 5.02.060(c) permits individuals to apply for a credit account with Metro for the purpose of disposal of solid waste on a credit basis; and

WHEREAS, To assist the Credit Manager in determining which credit applicants are able to pay Metro for their monthly accrued solid waste disposal charges a complete credit investigation is initiated; and

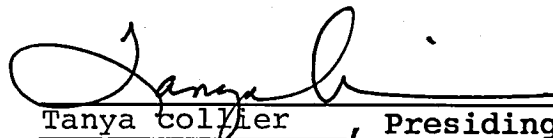
WHEREAS, Information from a credit reporting agency is a component of this credit investigation; and

WHEREAS, Dun & Bradstreet Corp. is the sole source for this type commercial credit information; now, therefore,

BE IT RESOLVED,

That based on the findings as stated in the Staff Report, the Contract Review Board hereby exempts the attached contract (Exhibit A hereto) with Dun & Bradstreet Corp. from the competitive bidding requirements under Metro Code Chapter 2.04.043 for the purchase of credit reporting services.

ADOPTED by the Contract Review Board of the Metropolitan Service District this 25th day of January, 1990.

  
\_\_\_\_\_  
Tanya Collier, Presiding Officer

FINANCE COMMITTEE REPORT

RESOLUTION NO. 90-1201, AUTHORIZING A SOLE SOURCE AGREEMENT  
WITH DUN AND BRADSTREET CORP. FOR THE PURCHASE OF CREDIT  
REPORTING SERVICES

---

Date: January 19, 1990

Presented by: Councilor  
Wyers

Committee Recommendation: At its January 18, 1990 meeting, the Committee voted unanimously to recommend adoption of Resolution No. 90-1201. Voting yes were Councilors Gardner, Wyers and Van Bergen. Councilors Collier and Devlin were excused.

Committee Discussion/Issues: Jennifer Sims, Manager of Financial Services, presented the staff report. She indicated that these services are necessary for the District to properly manage the credit program and policies for the solid waste system. The District's current contract with Dun and Bradstreet expired in December 31, 1989, and the proposed contract is for a one year period starting on January 31, 1990. The cost of the contract will be \$4,210. She further indicated that the vendor is the nation's only source of comprehensive commercial credit information.

Councilor Van Bergen raised questions about the confidentiality of information obtained by the District in the credit reports provided by Dun and Bradstreet and Mr. Ray Phelps indicated he would discuss the matter with General Counsel and report back to the Committee at its next meeting.

DEC:pa

#1C:.90-1201.RPT

NEW  The undersigned subscriber hereby employs Dun & Bradstreet, Inc. to furnish the following services to the subscriber on businesses located within the geographic area covered by the Reference Books leased hereunder for the one year period beginning 1/31, 19 90. The subscriber agrees to pay, in advance, for these services. The services include the use of the Reference Books and the availability and use of up to the number of Units specified below.

RENEWAL  Continue our Agreement for another year from date of expiration in the amount shown below.

SUPPLEMENT  Supplement our current Agreement dated \_\_\_\_\_ 19 \_\_\_\_ to cover the services indicated below.

REGULAR SERVICE  100 Regular Response Units  with Reference Books specified below \$ 2,510.00
DunsTransport Response Units @ \$21.10 each \$
(Supplement not available on 50 and 100 unit Contract)

BASIC SERVICE
 CREDIT CLEARING HOUSE SERVICE
 SCHEDULE A
 SCHEDULE B
 WOMENS WEAR
 GENERAL & MALE APPAREL
Additional Response Units at inception of this Agreement @\$30.00 each less discount based on number purchased: (Quantity pricing below does not apply to supplemental units)

Table with 6 columns: Contract Size In Units, Incremental Price Per Unit, Incremental Dollars, Contract Size In Units, Incremental Price Per Unit, Incremental Dollars. Includes rows for 101-500, 501-1000, 1001-2500, 2501-5000, 5001-10000, 10001-25000, 25001-50000, 50001+.

DUNS TRANSPORT
 QUALIFIED SERVICE (See below)
Subtotal Additional Units Purchased. # Units \$ 1,700.00
Total units purchased at inception of this Agreement. Total Regular Service \$ 4,210.00

OTHER

If the subscriber uses Units in excess of the number contracted for at a discounted rate, then the subscriber agrees to pay for them, on demand, at the base (undiscounted) rate of \$30.00 each (see paragraph 10).

Of amount shown, \$25 is for an annual subscription to the magazine D&B Reports, which, if not desired, may be deducted. Additional annual subscriptions, \$25 each.

As Supplement to Agreement:
Response Units @ \$30.00 each \$
Less discount, @ \$1050.00 per hundred \$ Total Supplement Service \$

REFERENCE BOOKS

Area 19 and Number 3 Jan., 19 90 Mar., 19 May,
Puerto Rico Reference Book Edition July, 19 Sept., 19 90 Nov., 19
Apparel Trades Book: Feb., 19 May, 19 90 Aug. 19 Nov. 19
Local Trading Area Service (Counties/States as shown):
Reference Book of Manufacturers: Spring Fall
Other

PREFERENCE SERVICES

By initialing here the subscriber elects to receive the preference services checked

Credit Advisor (CAS) Preference
 BIPAR Service
 Bankers Advisor (BAS) Preference
 BAS Preference Plus Bankers Financial Report Option
 BAS Plus Bankers Financial Report Option
 Duns Underwriting Guide (DUG) Preference
 DUG Preference Plus Option C
 DUG Option C on designated "Careful Analysis" accounts

QUALIFIED SERVICES

Charges based on the understanding that the annual sales volume of subscriber does not exceed \$
Subscriber's Initials

Local Trading Area Service
 Specialized Business Service
 Domestic or  Puerto Rico (specify options below)
 DunsTransport (25 Unit Limited Service)
 Credit Clearing House - Full Requirement Apparel Service (Subscriber to be provided with the availability and use of up to 500 Recommendation Service Units. Supplemental rate is \$6.25 each (in blocks of 50). Base (undiscounted) rate is \$12.40.)
These units may only be used to obtain the service(s) designated.

SOFTWARE

The subscriber elects to obtain a license to use the following software subject to the terms on the reverse side and agrees to pay D&B the licenses fees shown.

Title of Software:
Initial License Fee: \$ Renewal License Fee: \$

ACCESS SYSTEMS

The subscriber elects to use the access systems checked below and requests D&B to issue passwords therefor. The subscriber agrees to be responsible for all use of its passwords.

DunsDial  DunsPrint  DunsVoice-Type I  DunsVoice-Type II  International
Subscriber's Initials

KEY ALERT PROFILE

Public Record Filings  Operational  Rating  PAYDEX
 Financial  UCC

IMPORTANT Dun & Bradstreet, Inc. and the undersigned subscriber, by signing this Agreement, agree and intend to be bound by the terms hereof, including the Terms of Agreement on the reverse side which are made a part of this Agreement. Subscriber acknowledges receipt of a Schedule of Charges For Services which sets forth the exchange values of Units purchased under this Agreement. TOTAL \$ 4,210.00

By Dun & Bradstreet, Inc.

7E-24 (9001)

Manager

Date

Accepted By Authorized Signature Date

Name of Subscriber Metro Title

Mailing Address 2000 SW 1st Attn. Rick Ford

City Portland State OR Zip 97201

Print Signer's Name Title Function

STAFF REPORT

CONSIDERATION OF RESOLUTION NO. 90-1201 FOR THE  
PURPOSE OF AUTHORIZING AN EXEMPTION TO METRO CODE  
CHAPTER 2.04.043 COMPETITIVE BIDDING PROCEDURES  
AND AUTHORIZING A SOLE SOURCE AGREEMENT WITH DUN &  
BRADSTREET CORP. FOR THE PURCHASE OF CREDIT  
REPORTING SERVICES

---

DATE: December 20, 1989

Presented by: Rick Ford

PROPOSED ACTION

To approve the sole source contract with Dun & Bradstreet to provide credit reporting services to the Metropolitan Service District.

FACTUAL BACKGROUND AND ANALYSIS

Metro Code 5.02.060(c) states that individuals may apply for an account with Metro for the purpose of disposal of solid waste at the various solid waste sites on a credit basis.

In order to assist the Credit Manager in determining which credit applicants are able to pay Metro for their solid waste disposal charges, a complete credit investigation is initiated. This credit investigation includes confirmation of listed trade and banking references as well as receipt of information from a credit reporting agency.

Dun & Bradstreet Corp. is the nation's only source of comprehensive commercial credit information. Metro has used Dun & Bradstreet's services previously since Dun & Bradstreet is a sole source for this type of commercial credit information. Metro's current contract with Dun & Bradstreet expires December 31, 1989.

The expenses for this service have been included in the current budget by the Solid Waste Department. The new contract expenses for the calendar year ending December 31, 1990, will be \$4,210. The budgeted funds for these services is \$6,400.

EXECUTIVE OFFICER'S RECOMMENDATION

The Executive Officer recommends approval of Resolution No. 90-1201.

RFF/srs



# GRANT/CONTRACT SUMMARY

METROPOLITAN SERVICE DISTRICT

530-312310-524190-75000 50%

GRANT/CONTRACT NO. \_\_\_\_\_

BUDGET CODE NO. \_\_\_\_\_

FUND: \_\_\_\_\_ DEPARTMENT: Solid Waste

(IF MORE THAN ONE) 530-312410-524190-75000 50%

SOURCE CODE (IF REVENUE) \_\_\_\_\_

### INSTRUCTIONS

- OBTAIN GRANT/CONTRACT NUMBER FROM CONTRACTS MANAGER. CONTRACT NUMBER SHOULD APPEAR ON THE SUMMARY FORM AND ALL COPIES OF THE CONTRACT.
- COMPLETE SUMMARY FORM.
- IF CONTRACT IS —
  - SOLE SOURCE, ATTACH MEMO DETAILING JUSTIFICATION.
  - UNDER \$2,500, ATTACH MEMO DETAILING NEED FOR CONTRACT AND CONTRACTOR'S CAPABILITIES, BIDS, ETC.
  - OVER \$2,500, ATTACH QUOTES, EVAL. FORM, NOTIFICATION OF REJECTION, ETC.
  - OVER \$50,000, ATTACH AGENDA MANAGEMENT SUMMARY FROM COUNCIL PACKET, BIDS, RFP, ETC.
- PROVIDE PACKET TO CONTRACTS MANAGER FOR PROCESSING

1. PURPOSE OF GRANT/CONTRACT Sole Source Contract with Dun: Bradstreet Corp for Credit Reporting Services

2. TYPE OF EXPENSE
- |   |   |                                       |
|---|---|---------------------------------------|
| <input checked="" type="checkbox"/> PERSONAL SERVICES | <input type="checkbox"/> LABOR AND MATERIALS          | <input type="checkbox"/> PROCUREMENT  |
| <input type="checkbox"/> PASS THROUGH AGREEMENT       | <input type="checkbox"/> INTER-GOVERNMENTAL AGREEMENT | <input type="checkbox"/> CONSTRUCTION |
|   |   | <input type="checkbox"/> OTHER        |

OR

TYPE OF REVENUE  GRANT  CONTRACT  OTHER

3. TYPE OF ACTION
- |   |  |
|---|--|
| <input type="checkbox"/> CHANGE IN COST   | <input type="checkbox"/> CHANGE IN WORK SCOPE    |
| <input type="checkbox"/> CHANGE IN TIMING | <input checked="" type="checkbox"/> NEW CONTRACT |

4. PARTIES Dun: Bradstreet Corp.

5. EFFECTIVE DATE 1/31/90 TERMINATION DATE 12/31/90  
(THIS IS A CHANGE FROM \_\_\_\_\_)

6. EXTENT OF TOTAL COMMITMENT:

ORIGINAL/NEW	\$ <u>4,210.<sup>00</sup></u>
PREV. AMEND	_____
THIS AMEND	_____
<b>TOTAL</b>	\$ <u>4,210.<sup>00</sup></u>

### 7. BUDGET INFORMATION

A. AMOUNT OF GRANT/CONTRACT TO BE SPENT IN FISCAL YEAR 1989-890 \$ 4,210.<sup>00</sup>

B. BUDGET LINE ITEM NAME Misc. Prof. Services AMOUNT APPROPRIATED FOR CONTRACT \$ 6,400.<sup>00</sup>

C. ESTIMATED TOTAL LINE ITEM APPROPRIATION REMAINING AS OF 12/31/89, 1989 \$ 6,400.<sup>00</sup>

### 8. SUMMARY OF BIDS OR QUOTES (PLEASE INDICATE IF A MINORITY BUSINESS ENTERPRISE)

_____ SUBMITTED BY	\$ _____ AMOUNT	<input type="checkbox"/> MBE
_____ SUBMITTED BY	\$ _____ AMOUNT	<input type="checkbox"/> MBE
_____ SUBMITTED BY	\$ _____ AMOUNT	<input type="checkbox"/> MBE

9. NUMBER AND LOCATION OF ORIGINALS \_\_\_\_\_

4. APPROVED BY STATE/FEDERAL AGENCIES?  YES  NO  NOT APPLICABLE
5. 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 \_\_\_\_\_
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 _____ | 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

INTERNAL REVIEW

*Ray Phelps*  
DEPARTMENT HEAD

CONTRACT REVIEW BOARD

(IF REQUIRED) DATE \_\_\_\_\_

COUNCIL REVIEW

(IF REQUIRED)

1. \_\_\_\_\_  
COUNCILOR

DATE \_\_\_\_\_

2. \_\_\_\_\_  
COUNCILOR

3. \_\_\_\_\_  
COUNCILOR

FISCAL REVIEW

*Charles J. ...*  
BUDGET REVIEW  
12/22/89

LEGAL COUNSEL REVIEW AS NEEDED:

A. DEVIATION TO CONTRACT FORM \_\_\_\_\_

B. CONTRACTS OVER \$10,000 \_\_\_\_\_

C. CONTRACTS BETWEEN GOVERNMENT AGENCIES \_\_\_\_\_