

BEFORE THE COUNCIL OF THE  
METROPOLITAN SERVICE DISTRICT

FOR THE PURPOSE OF AUTHORIZING )	RESOLUTION NO. 91-1398A
THE RELEASE OF AN RFP FOR )	
GENERAL TECHNICAL SERVICES IN )	Introduced by Rena Cusma,
SUPPORT OF ITS CAPITAL )	Executive Officer
IMPROVEMENT AND FACILITY )	
DEVELOPMENT PROGRAMS )	

WHEREAS, the Metropolitan Service District (METRO) anticipates a continuing responsibility for the planning, design and construction of a wide range of public facilities; and

WHEREAS, METRO has a limited in-house capability for performing technical services and analyses associated with its facilities development programs; and

WHEREAS, METRO desires to augment its in-house capabilities with a single consultant or point of contact within a consulting firm which can provide for a wide range of technical services; and

WHEREAS, the request for proposals has been subjected to Metro's internal review procedures; and

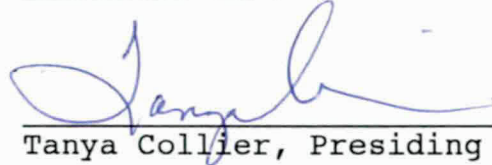
WHEREAS, the contract is subject to Council review and approval pursuant to Metro Code 2.04.033;

BE IT RESOLVED,

The Council of the Metropolitan Service District hereby authorizes the Request for Proposals for General Technical Services attached as Exhibit A to be issued by Metro's Finance and Administration Department and, authorizes the Executive

Officer to execute a contract provided the contract does not exceed \$150,000 and the scope of the work is substantially similar to that described in the request for proposal.

ADOPTED by the Council of the Metropolitan Service District this 14th day of February, 1991.



Tanya Collier, Presiding Officer

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WHEREAS, the contract is subject to Council review and approval pursuant to Metro Code 2.04.033;

BE IT RESOLVED,

The Council of the Metropolitan Service District hereby authorizes the [~~attached~~] Request for Proposals for General Technical Services attached as Exhibit A to be issued by Metro's

Finance and Administration Department and, [~~pursuant to Metro Code 2.04.033 (b), waives the requirement for Council review of the contract and~~] authorizes the Executive Officer to execute [~~the~~] a contract provided the contract does not exceed \$150,000 and the scope of the work is substantially similar to that described in the request for proposal.

ADOPTED by the Council of the Metropolitan Service District this \_\_\_\_\_ day of \_\_\_\_\_, 1991.

Tanya Collier, Presiding Officer

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FINANCE COMMITTEE REPORT

RESOLUTION NO. 91-1398A, FOR THE PURPOSE OF AUTHORIZING THE  
RELEASE OF A REQUEST FOR PROPOSAL FOR GENERAL TECHNICAL  
SERVICES

Date: February 12, 1991

Presented by: Councilor Hansen

COMMITTEE RECOMMENDATION: The Committee at its February 7, 1991 meeting voted unanimously to recommend Council adoption of Resolution No. 91-1398A as amended. Voting yes were Councilors Devlin, Hansen, Van Bergen and Wyers. Councilor Buchanan was excused.

COMMITTEE DISCUSSION / ISSUES: Neil Saling, Acting Finance and Administration Director, presented the staff report. He indicated that this Request for Proposal (RFP) is for an unanticipated multi-year contract and as such requires Council approval to release the RFP for response. The proposed resources to be acquired are technical services in support of capital construction and facilities development activities including engineering and architectural services. The approach to this contract is similar to the approach used for the District's general financial services contract. That is, a professional firm will be retained for a three year period to respond to needs of the various Metro Departments on an as needed basis. This approach expedites the process to acquire standard engineering/architectural services on a timely basis.

Mr. Saling indicated that the operating departments could request up to \$50,000 in work for the remainder of this fiscal year and approximately \$50,000 to \$75,000 in each of the next two fiscal years.

In response to questions from Committee members and Council staff, Mr. Saling pointed out that 1) his department would manage the contract by responding to requests for needed services from operating departments; 2) the costs for these services would be budgeted and directly expended in the appropriate operating funds (Zoo, Solid Waste, Metro Exposition-Recreation Commission, etc.); and 3) the Council will have an opportunity to review and budget funds for the contract in future fiscal years.

Councilor Devlin pointed out that the Resolution as proposed waives subsequent Council review and approval of the contract after the procurement process is complete. He proposed an amendment which the Committee accepted which authorizes the Executive Officer to execute a contract for these services on the condition that this initial contract does not exceed \$150,000, and the scope of work in the contract is substantially similar to that described in the Request for Proposal.

STAFF REPORT

IN CONSIDERATION OF RESOLUTION NO. 91-1398 FOR THE PURPOSE  
OF AUTHORIZING THE RELEASE OF THE METROPOLITAN SERVICE  
DISTRICT'S REQUEST FOR PROPOSALS (RFP) FOR PROVISION OF  
GENERAL TECHNICAL SERVICES

January 22, 1991

Presented By: Neil E. Saling

Proposed Action:

Adoption of Resolution No. 91-1398 would authorize the Finance and Administration Department to issue a request for submission of proposals (RFP) from firms interested in providing technical services to the district in support of its capital construction and facilities development activities.

The contract resulting from the RFP will be executed by requesting services at a prenegotiated rate. The contract will be a "multi-year" contract and is not currently identified in the fiscal year 1990-91 contracts list.

FACTUAL BACKGROUND AND ANALYSIS

Metro has a limited in-house capability for performing technical services and analyses associated with design, construction and maintenance of its public facilities. Once this in-house capability is exhausted, it becomes necessary to procure assistance through contracting.

An alternative to multiple small contracts is a standing contract for technical consulting and advisory services, sometimes referred to as an "open-end architect/engineer contract." Fees are paid on a per-task basis as opposed to a single lump sum or retainer.

To satisfy its needs, Metro desires a single consultant or point of contact within a firm to perform the work or to organize a team to accomplish the desired work. It is anticipated that the operating departments will require work costing a maximum of \$50,000 before the end of FY 1990-91.

The scope of anticipated services to be provided on request include:

STAFF REPORT  
Page 2.

General Assistance

- \* Plan to project approach & organization
- \* Consult on project delivery systems
- \* Develop or review schedules & budgets
- \* Prepare or review project summaries, RFPs and work scopes
- \* Serve as a resource for Metro management and staff

Technical Consulting

- \* Review plans and specifications for function and constructability
- \* Prepare or review various levels of project cost(s)
- \* Assist staff with defining and obtaining the need for special technical assistance
- \* Assist staff in resolution of Building Code and environmental conflicts and/or problems

Construction Management

- \* Assist with the administration and management of planning, design and construction contracts
- \* Advise on construction management approach
- \* Develop or review quality assurance/quality control plans
- \* Provide construction oversight
- \* Review proposed changes
- \* Provide periodic review of completed projects
- \* Assist with facility acceptance

Other Services

- \* Conduct or participate in special studies
- \* Assist with A/E selection and performance evaluation
- \* Support negotiations
- \* Serve as a "trouble-shooter"
- \* Serve as a "Mentor" or resource to staff

Budget Impact

It is anticipated that services in the amount of up to \$50,000 may be requisitioned by district departments in the remainder of fiscal year 1990-91. Funds for additional services will be requested in FY 1991-92 and subsequent budgets.

EXECUTIVE OFFICER RECOMMENDATION

The Executive Officer recommends approval of Resolution No. 91-1398.



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WHEREAS, the contract is subject to Council review and approval pursuant to Metro Code 2.04.033;

BE IT RESOLVED,

The Council of the Metropolitan Service District hereby authorizes the attached Request for Proposals for General Technical Services to be issued by Metro's Finance and Administration Department and, pursuant to Metro Code 2.04.033 (b), waives the requirement for Council review of the contract and authorizes the Executive Officer to execute the contract.

ADOPTED by the Council of the Metropolitan Service District  
this \_\_\_\_\_ day of \_\_\_\_\_, 1991.

Tanya Collier, Presiding Officer

REQUEST FOR PROPOSALS (RFP)  
FOR GENERAL TECHNICAL SERVICES FOR  
PUBLIC WORKS PROJECTS AND FACILITIES

I. INTRODUCTION

Metro is seeking proposals from qualified and experienced individuals or firms to provide a variety of technical consulting and advisory services. It is anticipated that tasks will be assigned thru a series of work orders issued by Metro. Compensation will be based on predetermined rates and the agreed level of effort for each assigned task.

Period of service will include the remainder of FY 90-91 with potential for renewal at Metro's sole option. During the period of the contract, the firm or individual will not be eligible for other Metro contracts of any kind.

The maximum value of potential tasks during the FY 90-91 period will be \$50,000. Metro does not warrant this amount or the amount of work that may be assigned.

II. BACKGROUND/HISTORY

Metro anticipates a continuing responsibility for the planning, design and consultation of a wide range of public facilities. With increasing frequency the technical staff and management find they could improve their productivity and move projects forward more smoothly if a senior person with varied and extensive experience were available for consultation and advice and to undertake a variety of short term tasks will providing a continuity and Metro familiarity not obtainable by concentrating with a number of separate persons or firms.

III. PROPOSED SCOPE OF WORK

Assignment of a senior qualified and experienced person to be available on call as needed to serve as a general consultant and advisor to Metro. The person will be available to Metro management and staff to provide general assistance, technical consulting and construction management support on various public works projects and facilities.

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Tasks assigned by Metro may include but not be limited to:

General Assistance

- \* Plan project approach & organization
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- \* Prepare or review project summaries, RFPs, work scopes
- \* Serve as a resource for Metro management and staff

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- \* Conduct or participate in special studies
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- \* Support negotiations
- \* Serve as a trouble shooter
- \* Serve as a "Mentor" or resource to staff

IV. QUALIFICATIONS/EXPERIENCE

The successful proposer must possess the following qualifications and experience:

- \* Appropriate technical ( ? ) and certification
- \* Several years of varied technical administrative and management experience in project development and delivery
- \* Knowledge of project planning, organization and delivery system
- \* Experience in design, design processor and review
- \* Skills and experience in contract and construction management
- \* Ability to respond and deliver services as requested
- \* Familiarity with public works procedures and facilities.

V. PROJECT ADMINISTRATION

The successful proposer will respond to and coordinate with the contact management/administration assigned by Metro.

IV. PROJECT TIME FRAME

Services will be provided thru the end of FY 90/91. Specific task deadlines and delivery requirements will be as specified in individual work orders.

VII. PROPOSAL INSTRUCTIONS

A. Submission of Proposals

Three (3) copies of the proposal shall be furnished to:

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Metropolitan Service District  
2000 S. W. First Avenue  
Portland, OR 97201-5398

B. Deadline

Proposals will not be considered if received after \_\_\_\_ PM, PST  
\_\_\_\_ 199\_\_. Postmarks are not acceptable.

- C. RFP as Basis for Proposals. This RFP represents the most definitive statement Metro will make concerning information upon which proposals are to be based. Any information which is not contained in this RFP or Amendments thereto will not be considered by Metro in evaluating the proposals.
- D. Subcontractors: Disadvantaged Business Program due to the indefinite and veined nature of prospective tasks and the personal service consulting approach the provisions of Metro's Disadvantaged Business Program will not apply to this contract. In the event that tasks authorized under this contract would include subcontract sub-tasks the issue of MBE participation will be addressed in the task request and authorization on a case by case basis.

#### VIII. PROPOSAL CONTENTS

The proposal should contain sufficient written material to describe the ability of the proposer to perform the work requested. Contents of the proposal should be as follows:

- A. Transmittal Letter: Indicate those individuals who will be assigned to the project, who will be project manager, and that the proposal will be valid for ninety (90) days. Metro intends to award this contract to a single firm to provide the services required. Proposals must identify a single person as project manager to work with Metro. The consultant must assure responsibility for supervising any subconsultant work and shall be responsible for the day-to-day direction and internal management of the consultant effort.
- B. Approach/Project Work Plan: Describe how the overall project will be managed and controlled. Include proposed procedures for identifying tasks, scoping, budgeting, performance, the work and reporting the status of tasks and overall contract.
- C. Staff Management: Identify the person responsible to Metro for the management of the project (contract). Name the individual proposed to serve as the senior consultant. Describe the background, qualification and special skills of this individual.
- D. Experience: List a number (5-10) projects, tasks or assignments that illustrate experience in the type of activities, facilities and anticipated tasks and roles outlined by this RFP. Provide the name and phone number of a contact person for each example listed.

- E. Cost/Budget: Present proposed method(s) of compensation, cost and cost control along with rates, reimbursement(s) and fees for applicable for the proposed contract period.
- F. Exceptions and Comments: To facilitate evaluation of proposals, Metro wishes that all responding firms adhere to the format outlined within this RFP. Firms wishing to take exception to, or comment on, any specified criteria within this RFP are encouraged to document their concerns in this part of their proposal. Exceptions or comments should be succinct, thorough and organized.

IX. GENERAL PROPOSAL/CONTRACT CONDITIONS

- A. Limitation and Award -- This RFP does not commit Metro to the award of a contract, not to pay any costs incurred in the preparation and submission of proposals in anticipation of a contract. Metro reserves the right to accept or reject any or all proposals received as the result of this request, to negotiate with all qualified sources, or to cancel all or part of this RFP.
- B. Contract Type -- Metro intends to award Personal Services Contract with the selected firm for this project. A copy of the standard form contract which the successful proposer will be required to execute is attached.
- C. Billing Procedures -- Proposers are informed that the billings by the selected firm are subject to the review and approval by Metro before reimbursement for services can occur. A monthly billing, accompanied by a progress report will be prepared.
- D. Validity Periodic and Authority -- The proposal shall be considered valid for a period of at least ninety (90) days and shall contain a statement to that effect. The proposal shall contain the name, title, address and telephone number of an individual or individuals with authority to bind the Proposer.



## **X. EVALUATION OF PROPOSALS**

### **A. Evaluation Procedures**

Proposals received that confirm to the proposal instructions will be evaluated. The evaluation will take place using the evaluation criteria identified in the following section.

### **B. Evaluation Criteria**

This section provides a description of the criteria which will be used in the evaluation of the proposals submitted to accomplish the work defined in the RFP. Proposals will be evaluated on their technical content consisting of the elements listed below. Cost elements will be used to negotiate and finalize the contract with the selected proposer.

## EVALUATION CRITERIA

- A. General -- Compliance with the RFP
- B. Project Approach/Work Plan
  - 1) Demonstration of Understanding of the Project Objectives
  - 2) Performance Methodology
- C. Qualifications
  - 1) Training & Certification
  - 2) General Background & resume
  - 3) Commitment to Project
- D. Experience
  - 1) Range of Experience
  - 2) Relevant projects, tasks and assignments
  - 3) Other applicable experience

**INSURANCE REQUIREMENTS:**

The contractor shall provide (from insurance companies acceptable to Metro) General Liability insurance coverage with a combined single limit of not less than \$500,000. Before commencing work under this contract the contractor shall furnish Metro with a certificate of insurance evidencing coverage as specified, naming Metro as an additional insured.