

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF AUTHORIZING THE) RESOLUTION NO. 93-1764
EXECUTIVE OFFICER TO EXECUTE A)
CONTRACT WITH THE MATRIX MANAGEMENT) Introduced by Rena Cusma,
GROUP TO COMPLETE STUDY ELEMENTS I) Executive Officer
AND II OF THE COMPREHENSIVE WASTE)
STREAM CHARACTERIZATION STUDY)

WHEREAS, Resolution NO. 92-1686, adopted on November 12, 1992, authorized issuance of a Request for Proposals for a "Comprehensive Waste Stream Characterization Study" for the purpose of entering into a multi-year contract with the most qualified proposer ; and

WHEREAS, A public Request for Proposal procedure was used pursuant to Metro Code, to obtain proposals for the "Comprehensive Waste Stream Characterization Study"; and

WHEREAS, Three proposals were submitted for providing the requested services; and

WHEREAS, An evaluation committee responsible for review of the submitted proposals evaluated and scored the written proposals and conducted interviews pursuant to Metro Code; and

WHEREAS, In order to most effectively utilize the available budget and achieve the goals and objectives of the Study, the selection committee has recommended to award the Study under two separate contracts, one contract to complete Study Elements I and II, and a separate contract for Study Element III; and

WHEREAS, After careful consideration by the selection committee, it was concluded that the Matrix Management Group has submitted the most cost effective, responsive, responsible proposal for the "Comprehensive Waste Stream Characterization Study - Study Elements I and II"; and

WHEREAS, The Executive Officer has reviewed the contract with the Matrix Management Group for the "Comprehensive Waste Stream Characterization Study - Study Elements I and II" and hereby forwards the Agreement to the Council for approval; now, therefore,

BE IT RESOLVED, That the Metro Council authorizes the Executive Officer to execute the attached contract (Exhibit "A" hereto) with the Matrix Management Group for the "Comprehensive Waste Stream Characterization Study - Study Elements I and II".

ADOPTED by the Metro Council this _____ day of _____, 1993.

NOT ADOPTED
Judy Wyers, Presiding Officer

WWM:acy
S SHARE/METZ/RFP/SW931764.RES
March 1, 1993

Project: Comprehensive Waste Characterization Study
Study Elements I and II
Contract No: 902936

PERSONAL SERVICES AGREEMENT

THIS AGREEMENT is between Metro, a metropolitan service district organized under the laws of the State of Oregon and the 1992 Metro Charter, located at 2000 S.W. First Avenue, Portland, OR 97201-5398, and The Matrix Management Group, referred to herein as "Contractor," located at 466 Coleman Bldg., 811-1st Avenue, Seattle, Washington 98104-9983.

In exchange for the promises and other consideration set forth below, the parties agree as follows:

1. **Duration.** This personal services agreement shall be effective March 29, 1993, and shall remain in effect until and including April 15, 1994, unless terminated or extended as provided in this Agreement.
2. **Scope of Work.** Contractor shall provide all services and materials specified in the attached "Exhibit A -- Scope of Work," which is incorporated into this Agreement by reference. All services and materials shall be provided by Contractor in accordance with the Scope of Work, in a competent and professional manner. To the extent that the Scope of Work contains additional contract provisions or waives any provision in the body of this Agreement, the Scope of Work shall control.
3. **Payment.** Metro shall pay Contractor for services performed and materials delivered in the amount(s), manner and at the time(s) specified in the Scope of Work for a maximum sum not to exceed ONE HUNDRED AND NINETY-THREE THOUSAND and NO/100THS DOLLARS (\$193,000.00).
4. **Insurance.**
 - a. Contractor shall purchase and maintain at the Contractor's expense, the following types of insurance, covering the Contractor, its employees, and agents:
 - (1) Broad form comprehensive general liability insurance covering bodily injury and property damage, with automatic coverage for premises, operations, and product liability. The policy must be endorsed with contractual liability coverage; and
 - (2) Automobile bodily injury and property damage liability insurance.
 - b. Insurance coverage shall be a minimum of \$500,000 per occurrence. If coverage is written with an annual aggregate limit, the aggregate limit shall not be less than \$1,000,000.
 - c. Metro, its elected officials, departments, employees, and agents shall be named as ADDITIONAL INSUREDS. Notice of any material change or policy cancellation shall be provided to Metro 30 days prior to the change or cancellation.

d. Contractor, its subcontractors, if any, and all employers working under this Agreement that are subject employers under the Oregon Workers' Compensation Law shall comply with ORS 656.017, which requires them to provide Workers' Compensation coverage for all their subject workers. Contractor shall provide Metro with certification of Workers' Compensation insurance including employer's liability. If Contractor has no employees and will perform the work without the assistance of others, a certificate to that effect may be attached, as Exhibit B, in lieu of the certificate showing current Workers' Compensation.

e. If required by the Scope of Work, Contractor shall maintain for the duration of this Agreement professional liability insurance covering personal injury and property damage arising from errors, omissions, or malpractice. Coverage shall be in the minimum amount of \$500,000. Contractor shall provide to Metro a certificate of this insurance, and 30 days' advance notice of material change or cancellation.

5. **Indemnification.** Contractor shall indemnify and hold Metro, its agents, employees and elected officials harmless from any and all claims, demands, damages, actions, losses and expenses, including attorney's fees, arising out of or in any way connected with its performance of this Agreement, or with any patent infringement or copyright claims arising out of the use of Contractor's designs or other materials by Metro and for any claims or disputes involving subcontractors.

6. **Maintenance of Records.** Contractor shall maintain all of its records relating to the Scope of Work on a generally recognized accounting basis and allow Metro the opportunity to inspect and/or copy such records at a convenient place during normal business hours. All required records shall be maintained by Contractor for three years after Metro makes final payment and all other pending matters are closed.

7. **Ownership of Documents.** All documents of any nature including, but not limited to, reports, drawings, works of art and photographs, produced by Contractor pursuant to this Agreement are the property of Metro, and it is agreed by the parties that such documents are works made for hire. Contractor hereby conveys, transfers, and grants to Metro all rights of reproduction and the copyright to all such documents.

8. **Project Information.** Contractor shall share all project information and fully cooperate with Metro, informing Metro of all aspects of the project including actual or potential problems or defects. Contractor shall abstain from releasing any information or project news without the prior and specific written approval of Metro.

9. **Independent Contractor Status.** Contractor shall be an independent contractor for all purposes and shall be entitled only to the compensation provided for in this Agreement. Under no circumstances shall Contractor be considered an employee of Metro. Contractor shall provide all tools or equipment necessary to carry out this Agreement, and shall exercise complete control in achieving the results specified in the Scope of Work. Contractor is solely responsible for its performance under this Agreement and the quality of its work; for obtaining and maintaining all licenses and certifications necessary to carry out this Agreement; for payment of any fees, taxes, royalties, or other expenses necessary to complete the work except as otherwise specified in the Scope of Work; and for meeting all other requirements of law in carrying out this Agreement. Contractor shall identify and certify tax status

and identification number through execution of IRS form W-9 prior to submitting any request for payment to Metro.

10. Right to Withhold Payments. Metro shall have the right to withhold from payments due to Contractor such sums as necessary, in Metro's sole opinion, to protect Metro against any loss, damage, or claim which may result from Contractor's performance or failure to perform under this Agreement or the failure of Contractor to make proper payment to any suppliers or subcontractors.

11. State and Federal Law Constraints. Both parties shall comply with the public contracting provisions of ORS chapter 279, and the recycling provisions of ORS 279.545 - 279.650, to the extent those provisions apply to this Agreement. All such provisions required to be included in this Agreement are incorporated herein by reference. Contractor shall comply with all applicable requirements of federal and state civil rights and rehabilitation statutes, rules and regulations including those of the Americans with Disabilities Act.

12. Situs. The situs of this Agreement is Portland, Oregon. Any litigation over this agreement shall be governed by the laws of the state of Oregon and shall be conducted in the circuit court of the state of Oregon, for Multnomah County, or, if jurisdiction is proper, in the U.S. District Court for the District of Oregon.

13. Assignment. This Agreement is binding on each party, its successors, assigns, and legal representatives and may not, under any circumstance, be assigned or transferred by either party.

14. Termination. This Agreement may be terminated by mutual consent of the parties. In addition, Metro may terminate this Agreement by giving Contractor five days prior written notice of intent to terminate, without waiving any claims or remedies it may have against Contractor. Termination shall not excuse payment for expenses properly incurred prior to notice of termination, but neither party shall be liable for indirect or consequential damages arising from termination under this section.

15. No Waiver of Claims. The failure to enforce any provision of this Agreement shall not constitute a waiver by Metro of that or any other provision.

16. Modification. Notwithstanding and succeeding any and all prior agreement(s) or practice(s), this Agreement constitutes the entire Agreement between the parties, and may only be expressly modified in writing(s), signed by both parties.

THE MATRIX MANAGEMENT GROUP

METRO

By: _____

By: _____

Print name and title

Print name and title

Date: _____

Date: _____

ATTACHMENT A

SCOPE OF WORK

Study Elements I and II

Comprehensive Waste Stream Characterization Study

PERSONAL SERVICES CONTRACT

Contractor: The Matrix Management Group

Contract # 902936

I. STATEMENT OF WORK

Contractor agrees to carry out the following tasks:

STUDY ELEMENT I: DISPOSAL SITE SAMPLING

1. Finalize Sampling Plan

Contractor shall complete study methodology and final sampling survey designs. Contractor and Metro staff (design and review team) will meet in a half-day working session to: 1) clarify mutual expectations and objectives; 2) identify unresolved issues; and 3) discuss potential modifications to the approach. After the initial meeting, the contractor shall revise their technical proposal as needed, complete the agreed upon methodology, prepare detailed sampling and survey plans, prepare all required forms for waste sampling (field sort form, driver survey forms, etc.) and training and safety plans. These products will be reviewed in a second meeting with Metro staff. Methodologies and sampling/survey designs will be documented and submitted to Metro for final approval before beginning work. The final sampling plan ("completed survey design") will include and be resolved concurrently with Study Element II - Tasks 5, 6, 7, and 8.

The "completed survey design", as used here, includes completion of (for both Study Elements I and II) the total number of samples to be gathered, selection of generators to be sampled, detailed sampling and survey plans, detailed work plans for the study, arrangements with disposal site operators and haulers for gathering and processing the samples, selection and training of the crews that will perform the sampling and sorting operation, preparation of approved data collection forms, and all other items, exclusive of equipment and supplies, included in the statement of work above that must be accomplished before samples can be gathered and sorted in the field.

2. Prepare work plans and project schedule

When sampling and survey designs are in final form, detailed work plans for proceeding with the study will be developed. These plans will identify all tasks, primary responsibilities and a schedule for each task. This document will also be submitted for Metro review and approval.

3. Select and Train Crew

- a. Contractor shall provide a sampling crew that will accurately and consistently sort samples in the most efficient and cost effective manner.
- b. Contractor shall draw from established crews currently being used for the ODEQ study. The crews shall be experienced and available to meet the schedule. To the greatest extent possible the same crew members shall be used throughout the project, to provide consistent sorting and productivity.
- c. Contractor shall conduct a 4-hour training session in the field at the beginning of the project. In addition, new crew members shall receive similar training before starting work. This training will cover:
 - Safety procedures and site conduct;
 - Demonstration of each step of the sample process;
 - Sorting techniques;
 - Waste component categories;
 - Quality control procedures;
 - Any unique features of the loads to be sampled.
 - Waste component categories shall be defined in detail using actual field examples. At least 2 hours shall be spent actually sorting waste samples.
- d. Contractor shall assure that all applicable OSHA standards are met including but not limited to all crew members being fitted with protective equipment such as: hard hats, safety vests, coveralls, heavy rubber gloves, ear plugs (or other protection), particle masks and safety glasses. All sampling personnel must wear hard hats, safety vests, coveralls, gloves and glasses at all times. The field supervisors shall carry a first aid kit and spare safety equipment (see Section 12, Health and Safety Protection).

4a. Conduct Commercial Load Sampling at Disposal Sites

Disposal Site Sampling

As determined in Task 1 and Task 2, the contractor shall characterize accurately the composition of both commercially hauled and self-hauled waste being delivered to three Metro-area disposal facilities (Metro Central, Metro South, and Hillsboro Landfill). The total number of commercial and self haul samples will be no less than 720. The allocation of these 720 samples to self-haul and commercial loads shall be determined by Metro as part of the Sampling Plan.

Self-haul vehicles will be systematically selected based upon anticipated vehicle counts and relative quantities delivered by each type of self-haul vehicle (passenger cars, pickups, large trucks, etc.). Sampling will occur during the same periods as commercially hauled loads. Within each monthly sort period, self-haul sampling will occur on randomly selected days and will begin at a randomly selected start time each day.

All three sites shall be sampled each month, according to the finalized Sampling Plan. Monthly sampling will be used to reduce error rates and more accurately portray seasonal variations. Metro will review and approve the final sample design. As determined in Task 1 and Task 2, and with prior Metro approval, the contractor will employ the following method to determine which trucks are to be sampled:

- Determine quotas for the number of trucks to be sampled by type (i.e., front loader, rear loaders, side loaders, and compactor boxes) at each of the three sampling sites.
- Select proposed sampling dates for each of the facilities. Sampling days will be determined by randomly selecting a start date for each monthly sort and then by randomly sequencing sorting sites during the sampling timeframe (5-6 days).
- Calculate sampling intervals (k) by truck type based upon the number expected to arrive at each site on the selected sampling days. Sampling intervals shall be determined by dividing the total number of truckloads (N) arriving at a given site by the number of samples (n) needed each day. The resulting "n" determines which vehicle arriving at a site will be selected for sampling.
- Each truckload shall be checked before sampling to avoid potential errors in truckload selection.

4a.1 Interview the driver

The driver of each vehicle selected for sampling shall be interviewed using Metro approved forms and protocol. Information regarding the origin of the wastes, generator type, vehicle classification, and other required information will be collected. All driver interviews shall be conducted only by the Director of Field Operations, the Field Supervisor, or other Metro approved personnel.

4a.2 Identify samples

Samples will be photographed prior to sorting. Each sample and/or load of waste material will be uniquely identified in order to match the photo to the sample data collected.

4a.3 Sort samples

On the day of the sort, the Director of Field Operations identifies the preselected truckloads (every kth load by truck type) and directs the vehicles to the sampling area.

Commercial loads shall be dumped at the sorting site in an elongated pile. Samples are to be selected randomly using an imaginary 16 cell grid (eight sections w/ two-layers) superimposed over the dumped material. The supervisor shall identify the pre-selected cell to be sorted. Approximately 200-250 pounds of waste is extracted by machine or hand from the designated cell and placed on a clean tarp for sorting.

The sample shall then be sorted by hand into the prescribed categories as specified in Exhibit A to this document, and placed in plastic laundry baskets to be weighed and recorded.

Each sample is to be sorted to the greatest reasonable level of detail by hand, until no more than a small amount of homogenous material remains ("supermix"). The goal is to sort each sample directly into component categories, leaving no supermix at all. If supermix remains, the total weight of it is recorded. The composition of the supermix is to be either estimated by the field supervisor visually (if its contents are distinguishable), or approximately 20 percent of the supermix is sorted down to the component level. The percentage of each material within the supermix is applied to the total quantity of supermix; the resultant component quantities shall then be added to the appropriate categories of the total sample. This reduces the amount of indistinguishable fines or miscellaneous categories.

The field supervisor will monitor the homogeneity of the component baskets as they accumulate, rejecting materials which may be improperly classified. The field supervisor will also verify the purity of each component as it is weighed, before recording the weight on the sampling form. Container and other item counts shall be made at the time of weighing.

A Metro approved data form shall be completed for each sample sorted. This form shall include information on the source of the sample, the type of truck delivering the sample, the type of generators that produced the load from which the sample was taken, the weight of each component of the sample, and other sample details. The contractor will produce the data forms, which will be expected to be comparable to the forms used by the DEQ in their state-wide waste characterization study.

4b. Select self-haul vehicles

As determined in Task 1 and Task 2, and with Metro approval:

- The systematic sampling approach will be based on selecting every k th vehicle for sorting based on the vehicle counts expected for the day and the required number of samples. Self-haul loads will also be sampled on randomly selected days during each monthly sampling period. These selected days will include weekends.
- To ensure a representative portrayal, the goal of the self-haul waste sampling is to sample by weight, not by number of vehicle loads. In order to avoid smaller loads from contributing disproportionately to final composition calculations, smaller vehicles will be undersampled: While they represent a large portion of self-haul vehicle loads, they typically weigh less.

- Sample quotas (n) by vehicle type will be determined by the relative tonnage of self-haul waste arriving in private automobiles, commercial pickups, and larger trucks. Vehicle types contributing the greatest proportion of self-haul wastes by weight will be allocated a larger number of the 128 self-haul samples. The total number of loads expected to arrive divided by the quota will determine the K value or sampling frequency for selecting self-haul loads among each population of vehicle types.

The field supervisor will implement the protocol identified in the contractor proposal and to check that each load and sample is correctly identified and extracted.

4b.1 Sort Samples

As above the field coordinator shall identify the correct load and directs the vehicle to the sorting area. The entire load is then dumped for sampling and sorting. Samples of self-haul wastes will be selected at random in the same manner as commercial loads, using an imaginary 16 cell grid. Sorting procedures used for commercial loads also apply to self-haul loads.

If the load is large enough, a random 200-250 pound sample will be selected from the dumped material. If the load weighs less than 250 pounds or if the contents are too bulky to be separated, the entire load will be sorted and weighed. In order to include bulky items, the entire sample shall be weighed and the proportion of the bulky item which should have been included in the sample is calculated. In the field, this process shall consist of recording and describing the sample and its bulky items accurately; visual estimation is sometimes required. This shall only be done by experienced field supervisors to ensure accurate and consistent treatment of bulky items in the sampling program.

The drivers of the self-haul vehicles shall be interviewed and a Metro approved data form will be completed for each sample. Information to be collected will include type of vehicle, type of generator, net vehicle weight, composition data, and other required sorting information. Any unusual factors which may affect the weight or composition of the materials sampled also will be noted. These notes will include information such as "entire load of irreparable furniture from Goodwill" or "construction and demolition debris from downtown commercial remodel".

STUDY ELEMENT II: COLLECTION AND CHARACTERIZATION OF GENERATOR SPECIFIC LOADS

5. Finalize Sampling Plan

Contractor shall coordinate and perform Study Element II concurrently with Study Element I. Contractor shall complete study methodology and final sampling survey designs. Contractor and Metro staff (design and review team) will meet in a half-day working session to: 1) clarify mutual expectations and objectives; 2) review the proposal and identify unresolved issues; and 3) discuss potential modifications to the approach. After the initial meeting, the contractor shall revise their technical proposal as needed, complete the agreed upon methodology, prepare detailed sampling and survey plans, prepare all required forms for waste sampling (field sort form, driver survey forms etc.) and training and safety plans. These products will be reviewed in a second meeting with Metro staff.

Methodologies and sampling/survey designs will be documented and submitted to Metro for final approval prior to beginning work.

Contractor shall collect generator specific loads at the point of generation and sort these loads at a remote facility. Composition and amount of disposed waste will be characterized for single-family, multi-family, and non-residential generators.

A minimum of 480 samples shall be sorted as part of this study element. Final allocation depends on the Sample Plan. These are expected to be allocated as follows:

- For single-family residences, waste from 160 households, 40 per season, will be collected from the curb and sorted.
- For multi-family residential, 40 complexes will be sampled each season for a total of 160 samples over the year.
- Waste from approximately 40 nonresidential generators will also be sorted each season. Overall, 160 nonresidential generators will be sampled.

6. Prepare work plans

When sampling and survey designs are in final form, detailed work plans for proceeding with the study will be developed. These plans will identify all tasks, primary responsibilities and a schedule for each task. This document will also be submitted for Metro review and approval. Contractor shall coordinate and perform in conjunction with Study Element I, Tasks 1 and 2.

7. Obtain Hauler Coordination

As determined in Study Element Tasks 1 and 2, and with final Metro approval, contractor shall solicit cooperation of the participating haulers and ensure deliveries of waste consistent with the sorting schedules and sampling methodology. This shall be closely coordinated with Metro.

The contractor shall expand on the discussions that Metro initiates with haulers for participation in this study. Contractor shall develop baseline information where necessary, to design and implement the waste sorts. The contractor will coordinate hauler participation to conform with the design of the sampling program. After coordination and approval with Metro staff, the contractor shall:

- a. Meet with participating local haulers to explain the nature of the project, goals to be achieved, overall project approach, and level of hauler participation.
- b. Coordinate hauler participation with field operations.
- c. Provide ongoing, Metro approved, coordination assistance with the participating haulers throughout the project.
- d. Determine reimbursement requirements for separate collection of generator specific loads.

8. Select and Train Crew

Contractor shall coordinate and perform in conjunction with Study Element I:

- a. Contractor shall provide a sampling crew that will accurately and consistently sort samples in the most efficient and cost effective manner.
- b. Contractor shall draw from established crews currently being used for the ODEQ study. The crews shall be experienced and available to meet the schedule. To the greatest extent possible the same crew members shall be used throughout the project, to provide consistent sorting and productivity.
- c. Contractor shall conduct a 4-hour training session in the field at the beginning of the project. In addition, new crew members shall receive similar training before starting work. This training will cover:
 - Safety procedures and site conduct;
 - Demonstration of each step of the sample process;
 - Sorting techniques;
 - Waste component categories;
 - Quality control procedures;
 - Any unique features of the loads to be sampled.
 - Waste component categories shall be defined in detail using actual field examples. At least 2 hours shall be spent actually sorting waste samples.
- d. Contractor shall assure that all applicable OSHA standards are met including but not limited to all crew members being fitted with protective equipment such as: hard hats, safety vests, coveralls, heavy rubber gloves, ear plugs, particle masks and safety glasses. All sampling personnel must wear hard hats, safety vests, coveralls, gloves and glasses at all times. The field supervisors shall carry a first aid kit and spare safety equipment (see Section 13, Health and Safety Protection).

9a. Sample Single-Family Residential Waste

As determined in Study Element I - Tasks 1 and 2, and in Study Element II - Tasks 5, 6, and 7, contractor shall characterize single-family residential waste by collecting waste from the point of generation before it is picked up in a compactor. Based on the pre-approved sampling plan, contractor shall collect garbage and where available, curbside recyclables, from randomly selected single-family residences each season. Single-family residences will be identified from routes or areas chosen by Metro staff. This task may be performed in conjunction and coordination with the Metro / PSU Residential Can Weight Study. After collecting waste and recyclables from these residences, materials will be individually sorted and identified by address.

9a.1 Select single-family households

As determined in Study Element I Tasks 1 and 2, and in Study Element II Tasks 5, 6, and 7, and with Metro staff determining the methodology (the stratified, cluster protocol developed by Portland State University in its Residential Can-Weight Analysis will be used), the contractor will randomly select single family residences for sampling. Collection methodology will be based on pickup from every k th house on a given collection route (systematic sampling).

9a.2 Collect samples

Materials from these households will be collected ahead of the garbage truck/recycling truck on the day of the normal pick-up by a Matrix vehicle. The sampling days will occur during the days selected for Element I sampling each month within the season. Each sample will be placed in a bag and tagged with the household address. Specific steps in this process are as follows:

- 1) Identify routes for collection of samples
- 2) Randomly select households to be sampled (using addresses or k th stop on a collection route)
- 3) Secure permission from haulers
- 4) Collect waste and recyclables from the curb
- 5) Identify each sample with the address of origin
- 6) Deliver waste and recyclables to a sorting area
- 7) Sort the waste and recyclables; record contents and weights.

9a.3 Sort samples

All of the waste within each single-family residential sample shall be sorted, using the approach described in Element I. However, unlike commercial loads, all sorting activity will be performed on sorting tables, with bins below and behind the sorters.

9b. Sample Multi-Family Residential Waste

As determined in Study Element I Tasks 1 and 2, and in Study Element II Tasks 5, 6, and 7, a minimum of forty multifamily complexes shall be sampled each quarter by the Consultant. A total of 160 different complexes will be sampled. Complexes shall be randomly selected within areas designated by Metro staff. To assure representative samples, the population of multifamily complexes will be stratified by location and by rent level. Collection will occur on normal pick-up days during the time monthly sampling is occurring at Metro area disposal sites.

9b.1 Select multifamily units to be sampled

The protocol for selecting multifamily samples will be developed in close coordination with Metro staff. Metro staff will select the areas for sampling. Within the selected areas, multifamily complexes will be identified by address and assigned to groups defined by either or both rent and geographic location within the designated sampling areas. Samples will be allocated to these groups in proportion to population. The process will consist of three steps:

- 1) Randomly select from populations stratified by geographic location and by rent level.
- 2) Identify day of collection during Element I sampling timeframe.
- 3) Arrange for special collection and delivery to a site where sorting is occurring.

9b.2 Collect samples

Contractor will coordinate and ensure that commercial haulers will collect dumpsters from preselected multifamily residences and to deliver these materials to one of the three sorting sites. Special trips will be required. Haulers will be reimbursed, as needed, for the cost associated with collecting these special loads.

9b.3 Sort samples

Contractor will select and sort samples using procedures outlined in Element I for commercial loads.

9c. Sample Nonresidential Waste

As determined in Study Element I - Tasks 1 and 2, and in Study Element II - Tasks 5, 6, and 7, contractor will select up to 10 types of Metro area nonresidential generators, as determined in coordination with Metro staff. Generators will be randomly selected from published data. Selection will be stratified based on estimates of waste generation. The generator types which produce more waste will be represented by a proportionally larger number of samples. The objective is to concentrate 80 percent of the sorts among those generator types producing 80 percent of the waste. The remaining 20 percent of the sorts will be equally distributed among other generator types. The top 20 percent of businesses in terms of size within each generator type also will be oversampled.

Waste from individual generators will be picked up by Metro area haulers making special trips, or by other methods developed by the Contractor.

9c.1 Select nonresidential waste generators

As determined in Study Element I Tasks 1 and 2, and in Study Element II Tasks 5, 6, and 7, with Metro approval, generators within each of the designated SIC categories will be chosen randomly, based on published business data. This process involves collecting data on the number and types of businesses in the selected area and then randomly selecting the business in each SIC category. Quotas will be by SIC and by size of business to assure a representative sample. Collection will normally occur on same day as regular collection while Element I sorting is occurring each season.

9c.2 Collect samples

Contractor will ensure that waste from individual generators will be collected by the waste haulers on special trips and delivered to Metro sorting sites. Contractor will make arrangements to sample each participant's waste on or just prior to the day their garbage would normally be picked up. Roll-off containers, if used by selected generators, will be diverted to one of the three sorting sites.

9c.3 Sort samples

Contractor will sort entire loads using a new sampling technique developed by Claudia Kauffman of Gartner Lee, and used in British Columbia. Waste will be surveyed by dumping the entire container, pulling out and weighing all the "large" items and then randomly extracting 200-250 pound sample for sorting from the remaining material in each load. This sorting procedure produces lower error rates for a given number of samples, since many of the large items which account for the greatest variation within loads are fully accounted for. Sorting the 200-250 pound samples will follow the same sequence as for commercial loads, described under Element I.

10. Data Processing and Delivery for Study Elements I and II

Contractor will ensure that field data forms are complete, accurate, and legible in preparation for data entry and analysis.

Field supervisors will be responsible for filling in and organizing the forms for each day's sampling or surveying activity. Field supervisors will compile and check each day's forms. Forms will then be reviewed by the Director of Field Operations and by the site survey coordinator prior to transmittal to Metro. Data forms will be reviewed for completeness and accuracy. All survey forms, driver interviews, and composition data sheets will be checked daily for missing fields and unusual values. Finally copies will be made prior to transmittal of the original forms to Metro.

Data forms shall be submitted to Metro each week, throughout each of the four sampling seasons. Weekly written reports that summarize the work completed at each study site will also be submitted. These shall include descriptions of any factors that might have a bearing on the subsequent data analysis and interpretation (e.g. weather, change in work crew, etc.).

Metro shall be responsible for all data entry and analysis, and for writing the final report of the study. Contractor shall, on request, provide advice and consultation to Metro on the proper method to analyze data from the waste sorts. On request, Contractor shall also review and comment on the results of the analysis and reports prepared by Metro for accuracy and quality control.

11. Disposal of Samples for Study Elements I and II

All samples must be recycled or properly disposed after sorting and measuring is complete. If items prohibited from disposal at a given facility are encountered, the disposal site operator shall be notified and the material set aside for the disposal site operator to handle in the manner that type of waste would normally be handled if discovered by the disposal site operators.

12. Health and Safety Protection

Contractor shall develop and implement a Health and Safety Protection Plan. Contractor shall conduct a training session at the beginning of sampling, as well as provide training to any new crew members not at initial session. This training will cover:

- Safety procedures and site conduct;
- Personal protective equipment;
- Bloodborne pathogens requirements;
- Demonstration of each step of the sample process;
- Waste component categories;
- Any unique features of the loads to be sampled.

Contractor shall assure that all applicable OSHA standards are met including but not limited to all crew members being fitted with protective equipment such as: hard hats, safety vests, coveralls, heavy rubber gloves, ear plugs, particle masks and safety glasses. All sampling personnel must wear hard hats, safety vests, coveralls, gloves and glasses at all times, except that safety vests shall not be required for working in areas where there is no heavy equipment used or other danger of head injury. Coverall requirements can be adjusted as necessary to accommodate conditions of high temperatures. The field supervisors shall carry a first aid kit and spare safety equipment.

13. Financial Incentives to Sorters

Contractor shall pay a financial bonus to personnel hired as sorters that continue to sort through the end of the study. This shall be done in order to provide for continuity and maintain consistency of the sorts throughout the study.

14. Equipment

The contractor shall provide all equipment necessary for effectively conducting the study, including safety equipment, sort containers, tents or other protective cover, trailer for storing and moving equipment, portable toilets if needed, crew lunches and transportation for sorting crews to the site.

II. DELIVERY SCHEDULE

- A. Contractor agrees to collect data on waste composition in the field as specified above under "Statement of Work", and further agrees to deliver data forms to Metro within ten days of the date that each data form is completed in the field.
- B. Contractor will supply a quarterly status report, showing the number, and type of samples taken at each site and highlighting any special circumstances of which Metro should be made aware, within one week of completion of gathering data in the field. As an alternative to the quarterly status report, contractor may substitute weekly status reports that accompany the delivery of data forms for that week.

- C. If Metro determines that work products (data forms or status reports) submitted by Contractor do not comply with the requirements of this contract, Metro shall return the work products by mailing them or delivering them to the Contractor with a written statement of why they fail to meet the requirements. Upon receipt of the returned work products, the Contractor shall cure all defects, and deliver the completed work product to Metro as soon as possible.

III. COMPENSATION / CONSIDERATION

A. Contractor agrees to perform services as described in Section I and Section II. Payments shall be made monthly on the basis of the percent of work completed in accord with a project schedule reviewed and approved by Metro. Total payments for the project shall not exceed \$193,000. For services provided under this contract by Elway Research and Thomas/Wright (subcontractors), services shall be billed on a time and materials basis not to exceed the stated amounts below. Metro will review and approve their final Work Plan and Scope of Services as provided for in Section I. Funds not used for these services will be held in a project contingency fund. The following individual tasks within the Scope of Work shall not exceed the following amounts:

- 1 a. For services provided by Matrix to conduct Study Element I: \$38,040.
- b. For services provided by Elway Research to conduct Study Element I: \$6,400.
- c. For services provided by ELC to conduct Study Element I: \$45,598.
This includes ELC sorting labor, field administration, and other services provided. This does not include food and travel expenses for John Inskip Environmental Learning Center staff or sorting members.
- 2 a. For services provided by Matrix to conduct Study Element II: \$20,560.
- b. For services provided by Elway Research Inc. to conduct Study Element II: \$1,920.
- c. For services provided by Thomas/Wright to conduct Study Element II: \$10,000.
- d. For services provided by ELC to conduct Study Element II: \$25,412.
This includes ELC sorting labor, field administration, and other services provided. This does not include food and travel expenses for John Inskip Environmental Learning Center staff or sorting members.
3. For services provided by Contractor to perform Task 10: \$4,400.
Data Processing and Delivery for Study Elements I and II.
4. For Contractor payment to haulers \$16,000.
A minimum contingency of \$16,000 shall be set aside by Contractor to reimburse haulers, as needed, for assistance with Study Element II of this contract. Hauler payments shall be clearly and explicitly itemized in the monthly billings. Hauler payments shall not exceed \$16,000. Any remaining funds not used for hauler payments shall be set aside as a contingency fund for this project.
5. For Contractor reimbursement, travel, meals, truck rental, and other expenses: \$24,670.
With Metro approval, other expenses directly identifiable to performance of services under this contract shall be reimbursed to contractor, and are included in the total amount. All reimbursements shall be clearly itemized in the billings. Any remaining funds not used for reimbursement expenses shall be set aside as a contingency fund for this project. These other expenses may include the following:

- Equipment rental and supplies necessary to carrying out waste sorting and other required activities (*all equipment purchased shall become property of Metro*).
 - Reproduction and printing costs; and
 - Communications expenses such as long distance telephone, facsimile, and postage other than used for general correspondence.
- B. Contractor shall not exceed and Metro will not pay, any amount in excess of the maximum compensation amount set forth above. If this maximum compensation amount is increased by amendment of this contract, the amendment must be fully effective before Contractor performs work subject to the amendment. Contractor shall notify Metro's supervising representative in writing thirty (30) days before this contract expires of the upcoming expiration of the contract. No payment will be made for any services performed before the beginning date or after the expiration date of this contract. This contract will not be amended after the expiration date.
- C. Contractor shall submit monthly billings for work performed. The billing shall clearly and precisely describe with particularity all work performed, by whom it was performed, and shall itemize and explain all expenses for which reimbursement is claimed. The billings shall include the total amount billed to date by Contractor prior to the current invoice. Contractor shall specifically note in the billing when one-third and two-thirds of the maximum contract amount, including expense reimbursement, has been billed. Billings shall be sent to Metro's supervising representative.
- D. The billing rate on an hourly basis for individuals shall be:
- Charles Scott, Matrix Management Group: \$85/hour (including overhead).
 - Brad Anderson, Matrix Management Group: \$65/hour (including overhead).
 - Gene Patterson, Elway Research: \$70/hour (including overhead).
 - Suzie Haberland, Matrix Management: \$55/hour (including overhead).
 - Kathleen Robertson, Thomas/Wright: \$75/hour (including overhead).
 - Nan Hage, Environmental Learning Center: \$40/hour (including overhead).
 - Crew Labor, Environmental Learning Center: \$22/hour (including overhead).

Expenses normally considered as overhead are included in the billing rates for professional staff under this contract, and are not to be separately reimbursed. These overhead expenses include expenses such as insurance, office rent, base phone bill, staff benefits, and supplies used in normal office routine and not used in the field.

SOLID WASTE COMMITTEE REPORT

CONSIDERATION OF RESOLUTION NO. 93-1764, FOR THE PURPOSE OF AUTHORIZING THE EXECUTIVE OFFICER TO EXECUTE A CONTRACT WITH THE MATRIX MANAGEMENT GROUP TO COMPLETE STUDY ELEMENTS I AND II OF THE COMPREHENSIVE WASTE STREAM CHARACTERIZATION STUDY

Date: March 18, 1993

Presented by: Councilor McLain

Committee Recommendation: At the March 16 meeting, the Committee voted unanimously to recommend Council adoption of Resolution No. 93-1764. Voting in favor: Councilors Buchanan, McFarland, McLain, Washington and Wyers.

Committee Issues/Discussion: Terry Petersen and Bill Metzler, Solid Waste Staff, presented the staff report. Metzler noted that the data collected from the waste characterization study is very useful to department planning, modeling, recycling and waste reduction efforts. He explained that the department issued an RFB for the work and received three responses. Staff determined that the work would be divided between two contractors. One contractor had a superior proposal for two of the study elements and a second contractor submitted a better proposal for the third study element.

This resolution proposes to award the work for study elements I and II to Matrix Management Group. These elements include disposal site sampling and generator specific sampling. The total amount budgetted for the waste characterization study is \$250,000. Metzler indicated that the contract with Matrix would be for a maximum of \$193,000. Metzler noted that the contract would be for one year which would allow Matrix to conduct sampling over a four-season cycle.

Councilor Wyers asked how the cost of the contracts for the study would be broken down. Metzler explained that the Matrix contract would be for \$193,000, the proposed contract for study element III with Environmental Careers Organization (see Resolution No. 93-1765) would be for \$42,000, and a yet to be awarded contract for a special analysis of construction demolition debris would be for \$15,000.

Councilor McFarland asked who had performed the work during the 1989 waste characterization study. Petersen noted that the study was done by SCS Engineering and Wiltse-Ham Engineering. Petersen explained that one the participants in the study from Wiltse-Ham also was a participant in the unsuccessful bid for the new study.

Councilor McFarland asked about the extent to which Metro employees would supervise the study. Metzler indicated that Matrix has experience in the field organization and supervision of similar types of garbage sorts because they are the contractor for the ongoing statewide waste characterization study funded through DEQ. Metzler noted the Metro hopes to develop some in-house expertise as

a result of the new study.

Councilor McFarland asked if the contract award was based solely on the lowest bid. Metzler responded that the award was based on use of the evaluation criteria in the bid documents. Councilor McFarland expressed concern about rejecting the contractor that had satisfactorily performed the earlier study. She asked how WBE/MBE issues were addressed in the evaluation. Metzler explained that while WBE/MBE considerations were a part of the evaluation, the Matrix proposal was much superior on most of the evaluation criteria. He noted that the Matrix proposal had 16% MBE/WBE participation.

Councilor Washington indicated that he had some concerns and asked for an explanation of the evaluation process. Staff explained that the initial evaluation team found that the experience and management time commitment included in the Matrix proposal to be clearly superior to the Cascade Pacific proposal. He noted that the role of the sort team, which included significant minority participation in the Cascade Pacific proposal, was too small to be a determining factor, particularly when Matrix was rated higher on all other evaluation criteria. For example, he noted that the Matrix proposal better addressed the level of detail of the proposed sort.

Councilor McLain noted that the participation in the earlier study by those involved in the Cascade Pacific proposal appeared to be limited. She asked staff to address the experience issue. Metzler indicated that Matrix appeared to better understand the detailed nature of the garbage sorting proposed for the study. He noted the this sort would be much more extensive than the sort in the 1989 study. He noted the experience of the field leaders and management team in the Matrix proposal was superior. He also indicated that the evaluation team was uncertain about the amount of time that the Cascade Pacific project manager would actually be devoting to the project.

Councilor Washington noted that the bulk of the work simply involved sorting garbage and asked how much experience was needed to perform this work. Staff responded that Metro also would be relying on the contractor for sampling technique advice, site coordination and the ability to prepare and check reports.

Councilor McFarland indicated that she had a basic concern that the contractor that had, in part, performed the earlier study was being rejected on the basis of experience.

Bob Martin expressed concern about the committee's questioning of the evaluation process. He noted that after concerns had been expressed about the initial evaluation, he set up a second evaluation committee that included several minority members. He noted that the second committee also unanimously recommended that the contract be awarded to Matrix.

Councilor McLain indicated that she felt that MBE/WBE issues had been fairly addressed. Councilors McFarland and Wyers also indicated that they were not implying that there were any improprieties in the evaluation process.

Bob Martin expressed concern that denial of awarding the contract to Matrix without any concrete justification would raise the risk of a lawsuit from Matrix.

Bruce Broussard, a minority participant in the Cascade Pacific proposal, offered testimony. He indicated that, in his opinion, many of the individuals involved in the Matrix proposal also would require training prior to conducting the required garbage sort. He felt the concerns relating to the experience and involvement of the Cascade Pacific management team had been adequately addressed in the evaluation interview process. He noted that when Matrix won the state contract from DEQ, they contacted him in an attempt to arrange for sorters. But he noted that they were offering minimum wages. He indicated that the Cascade Pacific proposal to Metro would have offered "living" wages of \$9-10/hour.

Councilor McLain asked staff if the evaluation had included an examination of labor costs. Metzler indicated that Matrix intends to pay about \$7/8/hour with bonuses for those who remain for the entire length of the project.

STAFF REPORT

IN CONSIDERATION OF RESOLUTION NO. 93-1764 FOR THE PURPOSE OF AUTHORIZING THE EXECUTIVE OFFICER TO EXECUTE A CONTRACT WITH THE MATRIX MANAGEMENT GROUP TO COMPLETE STUDY ELEMENT I AND STUDY ELEMENT II OF THE COMPREHENSIVE WASTE STREAM CHARACTERIZATION STUDY.

Date: March 1, 1993

Presented by:

Terry Petersen
Bill Metzler

PROPOSED ACTION

Adoption of Resolution No. 93-1764, authorizing the Executive Officer to execute a contract with The Matrix Management Group to complete Study Elements I and II of the Comprehensive Waste Stream Characterization Study.

FACTUAL BACKGROUND AND ANALYSIS

On November 12, 1992, the Metro Council approved Resolution No. 92-1686 for the purpose of entering into a multi-year contract with the most qualified respondent by authorizing issuance of a Request for Proposals for a Comprehensive Waste Stream Characterization Study. Metro is responsible for the characterization of waste in the tri-county region.

Metro uses the study to obtain basic data that are critical to regional solid waste management and planning activities. Waste characterization studies require waste sorting to occur over a number of seasons. The study is being coordinated and integrated with other Metro programs, local governments, and haulers.

The Comprehensive Waste Stream Characterization Study is composed of three Study Elements. These are summarized as follows:

- **Study Element I - Disposal Site Sampling:** Vehicles delivering waste to disposal sites will be selected for sampling. A sample will be chosen from the waste delivered, sorted into various components, and each component weighed.
- **Study Element II - Generator Specific Sampling:** Targeted waste includes single-family residential, multi-family residential, and non-residential waste. Waste from these generators will be collected separately and brought to the disposal site for characterization.
- **Study Element III - User Survey and Visual Characterization at Disposal Sites:** Key data will be collected on users of six or more disposal sites. The survey will include visual inspection and general classification of waste loads as they are unloaded.

In response to the Comprehensive Waste Stream Characterization Study RFP (RFP #92R-33-SW), three proposals were submitted on December 14, 1992. These proposals were reviewed,

evaluated, and scored by a selection committee. Evaluations were based on the criteria set forth in the RFP. Interviews were also conducted in order to assist in the evaluation process.

In order to most effectively utilize the available budget and achieve the goals and objectives of the study, the selection committee made a recommendation to conditionally award the study under two separate contracts, one contract for both Study Elements I and II, and a separate contract for Study Element III. Metro intends to award Study Element III of this study under a separate contract and resolution (see Contract No. 902937, Resolution No. 93-1765).

The selection committee made a recommendation to conditionally award the contracts on January 15, 1993. Respondents to the RFP were notified of the conditional award of the contracts. The lowest responsible, responsive proposal for Study Elements I and Study Element II of the Comprehensive Waste Stream Characterization Study is The Matrix Management Group.

In addition, a subcontractor (for the prime consultant that did not receive the conditional award for Study Elements I and II), requested another opportunity to present their portion of the proposal. In response, the Solid Waste Director granted them the opportunity to have a supplemental interview with an expanded interview team. The supplemental interviews were held on February 1, 1993 and on February 2, 1993, for Study Elements I and II of the Comprehensive Waste Stream Characterization Study.

The supplemental interview team reviewed the proposals and conducted the supplemental interviews. After careful consideration, the supplemental interview team found no reason to modify the decision of the original selection committee. The RFP respondents were then notified of Metro's decision to conditionally award the contracts in accordance with the original notification. The subcontractor (not receiving the contract award), was then invited to meet with the supplemental interview team to discuss the outcome of the interview, and clarify any unresolved issues.

The apparent lowest responsible, responsive proposal for Study Elements I and Study Element II of the Comprehensive Waste Stream Characterization Study is The Matrix Management Group.

BUDGET IMPACT

It is expected that this work will begin March 29, 1993 and last for approximately one calendar year. This is a Council Designated "B", multi-year contract. In the FY 1992-93 budget, \$50,000 is allocated for work to be performed through June 1993. The remaining pre-approved funds (\$143,000), will come from the FY 1993-94 budget.

EXECUTIVE OFFICER RECOMMENDATION

The Executive Officer recommends approval of Resolution No. 93-1764.



METRO

2000 SW First Ave.
Portland, OR 97201-5398
(503) 221-1646

Procurement Review Summary

To: Procurement and Contracts Division

Vendor

From

Date 2/26/93

Matrix Management Group

Department Solid Waste

466 Coleman Bldg.
811 - 1st Ave

Division Planning & Technical

Subject

Seattle WA 98104-9983

Name Bill Metzler

Bid

Contract

Vendor no.

Title Associate SW Planner

RFP

Other

Contract no. 902936

Extension 290

Purpose Comprehensive Wastestream Study - Elements I & II

Expense

Procurement Personal/professional services Services (LM) Construction IGA

Revenue	Budget code(s)	Price basis	Term
<input type="checkbox"/> Contract	<u>531-310830-524190-76830</u>	<input type="checkbox"/> Unit	<input type="checkbox"/> Completion
<input type="checkbox"/> Grant		<input checked="" type="checkbox"/> Total	<input type="checkbox"/> Annual
<input type="checkbox"/> Other		<input type="checkbox"/> Other	<input checked="" type="checkbox"/> Multi-year**
This project is listed in the 199 <u>2</u> -199 <u>3</u> budget.		Payment required	<u>3/29/93</u>
<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> Type A	<input type="checkbox"/> Lump sum	Beginning date
<input type="checkbox"/> No	<input checked="" type="checkbox"/> Type B	<input checked="" type="checkbox"/> Progress payments	<u>4/15/94</u>
			Ending date

Total commitment	Original amount	\$ <u>193,000.00</u>
	Previous amendments	\$ <u> </u>
	This transaction	\$ <u> </u>
	Total	\$ <u>193,000.00</u>
	A. Amount of contract to be spent fiscal year <u>92</u> - <u>93</u>	\$ <u>50,000.00</u>
	B. Amount budgeted for contract <u>Misc. Prof. Services</u>	\$ <u>442,000.00</u>
	C. Uncommitted/discretionary funds remaining as of <u>2/19/93</u>	\$ <u>324,818.50</u>

Approvals <u>[Signature]</u> <u>3/1/93</u>	<u>[Signature]</u>	Labor
Division manager	Department director	Risk
Fiscal	Budget <u>[Signature]</u> <u>3-4-93</u>	
Legal		

Competitive quotes, bids or proposals:

Matrix Management	\$191,818		Foreign-WA
Submitted by	\$Amount	M/W/DBE	Foreign or Oregon Contractor
Cascade Pacific	\$198,995		OR
Submitted by	\$Amount	M/W/DBE	Foreign or Oregon Contractor
Submitted by	\$Amount	M/W/DBE	Foreign or Oregon Contractor

Comments:

Attachments:

- Ad for bid
- Plans and specifications
- Bidders list (M/W/DBEs included)

Instructions:

1. Obtain contract number from procurement division.
Contract number should appear on the summary form and all copies of the contract.
2. Complete summary form.
3. If contract is:
 - A. Sole source, attach memo detailing justification.
 - B. Less than \$2,500, attach memo detailing need for contract and contractor's capabilities, bids, etc.
 - C. More than \$2,500, attach quotes, evaluation form, notification of rejection, etc.
 - D. More than \$10,000 or \$15,000 attach RFP or RFB respectively.
 - E. More than \$50,000, attach agenda management summary from council packet, bids, RFP, etc.
4. Provide packet to procurement for processing.

Special program requirements:

- General liability: _____ / _____ / _____
- Liquidated damages \$ _____ day
- Workers comp
 - Prevailing wages
 - Auto
 - Non-standard contract
 - Professional liability
 - Davis/Bacon

Dates:

- Ads _____ (Publication) _____
- Pre-bid meeting _____ Bid opening** _____
- Filed with council _____ For action _____
- Filed with council committee _____ For hearing _____

Project estimate: _____

Funding:

- Local/state
- Federal
- Other

Bond requirements:

- _____ % Bid \$ _____
- _____ % Performance \$ _____
- _____ % Performance/payment* \$ _____
- _____ % L/M \$ _____

* Separate bonds required if more than \$50,000.

** Minimum period: two weeks from last day advertised.



METRO


 2000 S.W. First Avenue
 Portland, OR 97201-5398
 503/221-1646

Memorandum

DATE: March 1, 1993

TO: Neil Saling, Director of Regional Facilities

FROM:  Terry Petersen, Planning and Technical Services Manager

THROUGH: Bob Martin, Solid Waste Director 

RE: **Contract Status / Background for Metro's Waste Characterization Study and Request for Contract Expedite Processing**

Per your request, the following is a summary of the status of the contracts for the Comprehensive Waste Stream Characterization Study. We respectfully request a special processing of these contracts. They must be filed with Metro Council on March 9, 1993. This project has been significantly delayed due to the extra efforts and steps we initiated to ensure a careful consideration for conditional award of the contracts. Your assistance in this matter is appreciated.

The contracts are Council Designated "B" and are multi-year contracts. They have been conditionally awarded as follows:

1. The Matrix Management Group - Study Elements I and II, Contract No. 902936.
2. The Environmental Careers Organization - Study Element III, Contract No. 902937.

We are proceeding with the contract review process and will have them ready for review by March 1, 1993.

Background

In response to the Comprehensive Waste Stream Characterization Study RFP (RFP# 92R-33-SW), three proposals were submitted on December 14, 1992. Proposals were submitted by Cascade Pacific Engineering, The Matrix Management Group, and The Environmental Careers Organization.

The proposals were reviewed, evaluated, and scored by the selection committee members (Bill Metzler Scott Klag, and Jim Goddard). An evaluation form was used, based on the evaluation criteria set forth in the RFP. The proposals were evaluated by both Tasks and Study Elements as detailed in the RFP. A summary of the scored evaluations is available for your review. In addition, interviews were conducted with Cascade Pacific Engineering and The Matrix Management Group.

The selection committee recommended that the study be awarded under two separate contracts - a single contract for completion of both Study Elements I and II, and a second contract for completion of Study Element III. This was recommended in order to most effectively utilize the available budget, and achieve the goals and objectives of the study.

The selection committee made a recommendation to conditionally award the contracts on January 15, 1993. Respondents to the RFP were notified of the conditional award of the contracts (see letter dated January 15, 1993). A subcontractor with the Cascade Pacific Engineering team felt that they did not have ample opportunity to present their part of the proposal at the original interview. In response, the Solid Waste Director granted them the opportunity to have a supplemental interview with an expanded interview team. This supplemental interview team was formed to determine if the supplemental interview should have any bearing on the decision of the original selection committee.

The supplemental interview evaluation team was composed of the following members:

- Debbie Gorham, Waste Reduction Manager
- Terry Petersen, Planning & Technical Services Manager
- Amha Hazen, Contracts Administrator
- Craig Lewis, Solid Waste Contracts Compliance
- Scott Klag, Senior Solid Waste Planner
- Jim Goddard, Senior Solid Waste Planner
- Bill Metzler, Project Manager

The supplemental interview team reviewed the proposals. Supplemental interviews were held on February 1, 1993 with the Matrix Management Group team, and on February 2, 1993 with the Cascade Pacific Engineering team. After careful consideration, the supplemental interview team found no reason to modify the decision of the original selection committee. Mr. Martin was then notified of the decision of the selection committee. The proposers were then notified of the supplemental interview team decision (see conditional award of contract letter dated February 10, 1993).

In addition, we invited the subcontractor to meet with the supplemental interview team to clarify and discuss the outcome of the interview, the RFP process, Metro Code requirements, and any other unresolved issues related to the waste characterization study. This meeting was held for informational purposes on behalf of the subconsultant on February, 24, 1993.

Thank you for your assistance in this important matter. Please let me know if you have any questions or comments.

cc: Rich Wiley, Procurement Officer
Amha Hazen, Contracts Administrator
Craig Lewis, Senior Management Analyst
Bill Metzler, Project Manager

TP:bm:ck

2000 SW First Avenue
Portland, OR 97201-5398
(503) 221-1646
Fax 241-7417

February 10, 1993

Mr. Charles R. Scott
Senior Associate
Matrix Management Group
466 Colman Bldg., 811-1st Avenue
Seattle, Washington 98104-9983

RE: Supplemental Interview Results & Notice of Conditional Award of a
Contract for Study Elements I and II of the Metro Comprehensive Waste
Stream Characterization Study.

Executive Officer
Rena Cusma

Metro Council

Jim Gardner
Presiding Officer
District 3

Judy Wyers
Deputy Presiding
Officer
District 8

Susan McLain
District 1

Terry Moore
District 2

Richard Devlin
District 4

Edward P. Gronke
District 5

George Van Bergen
District 6

Ruth McFarland
District 7

Tanya Collier
District 9

Roger Buchanan
District 10

Ed Washington
District 11

Sandi Hansen
District 12

Dear Mr. Scott:

After careful consideration, the supplemental interview team found no reason to modify the decision of the original selection committee. The supplemental interview team recommends that the Matrix Management Group be conditionally awarded the contract for Study Elements I and II of the Metro Comprehensive Waste Stream Characterization Study.

Actual execution of the contract with The Matrix Management Group is subject to scope of work, project schedule, and reimbursement negotiations. In addition, approval from Metro's Procurement Management Division and the Metro Council is required.

As a starting point for negotiations, I will send you a copy of our standard contract form and a draft of the scope of work to be included in the contract. The scope of work will be consistent with what The Matrix Management Group submitted to Metro in its proposal dated December 14, 1992. We would like to refine and adjust some of the tasks identified in your proposal in order to better meet our needs.

We look forward to working with you on this important project. Please feel free to contact me with any questions or suggestions you may have.

Sincerely


William W. Metzler
Project Manager

WWM:ae

cc: Bob Martin, Solid Waste Director
Terry Petersen, Planning and Technical Services Manager
Craig Lewis, Contracts Compliance
Rich Wiley, Procurement Officer

METRO

2000 SW First Avenue
Portland, OR 97201-5398
(503) 221-1646
Fax 241-7417

February 8, 1993

Mr. David K. Luneke, P.E.
President
Cascade Pacific Engineering, Inc.
12300 SE Mallard Way, Suite 205
Milwaukie, Oregon 97222

RE: Supplemental Interview Results & Status of Conditional Contract Award for
the Metro Comprehensive Waste Stream Characterization Study

Dear Mr. Luneke:

After careful consideration, the supplemental interview team found no reason to
modify the decision of the original selection committee.

The supplemental interview team recommends that The Matrix Management Group
be conditionally awarded the contract for Study Elements I and II of the Metro
Comprehensive Waste Stream Characterization Study. The contract for Study
Element III has been conditionally awarded to the Environmental Career
Organization.

We appreciate your interest in this project and the time you took to prepare the
proposal. The competitive Request for Proposal is an important part of Metro's effort
to conduct its operations efficiently and effectively. We hope that you would
continue to consider responding to future Metro RFPs

Sincerely



William W. Metzler
Project Manager

WWM:aeY

cc: Bob Martin, Solid Waste Director
Terry Petersen, Planning and Technical Services Manager
Craig Lewis, Contracts Compliance
Rich Wiley, Procurement Officer



METRO

2000 S.W. First Avenue
Portland, OR 97201-5398
503/221-1646

Memorandum

DATE: February 4, 1993

TO: Bob Martin, Solid Waste Director

FROM: *AM* Bill Metzler, Project Manager

THROUGH: *TP* Terry Petersen, Planning and Technical Services Manager

RE: Recommendation of Supplemental Interview Team
- Waste Characterization Study RFP

The supplemental interview team has reviewed the proposals submitted by both Cascade Pacific Engineering and The Matrix Management Group. Supplemental interviews were held on February 1, 1993 with the Matrix Management Group Team and on February 2, 1993 with the Cascade Pacific Engineering Team.

The supplemental interview evaluation team was composed of the following members:

- Debbie Gorham, Waste Reduction Manager
- Terry Petersen, Planning & Technical Services Manager
- Amha Hazen, Contracts Administrator
- Craig Lewis, Solid Waste Contracts Compliance
- Scott Klag, Senior Solid Waste Planner
- Jim Goddard, Senior Solid Waste Planner
- Bill Metzler, Project Manager

After careful consideration, the supplemental interview team found no reason to modify the decision of the original selection committee. Therefore, I recommend we notify the proposers of the outcome and proceed with the project.

METRO

2000 SW First Avenue
Portland, OR 97201-5398
(503) 221-1646
Fax 241-7417

January 27, 1993

Mr. Charles R. Scott
Matrix Management Group
466 Colman Building
811 1st Avenue
Seattle, WA 98104-9983

Dear Charlie:

Thank you for agreeing to participate in the upcoming supplemental interview for Metro's Comprehensive Waste Stream Characterization Study RFP. As you know, Bob Martin, the Solid Waste Director has requested that we more thoroughly review the recommendation of the selection committee. Accordingly, I have assembled a supplemental review team which will include the following individuals:

Bill Metzler	Project Manager
Debbie Gorham	Waste Reduction Manager
Terry Petersen	Solid Waste Planning & Technical Services Manager
Amha Hazen	Contracts Administrator
Craig Lewis	Solid Waste Contracts Compliance
Jim Goddard	Sr. Solid Waste Planner
Scott Klag,	Sr. Solid Waste Planner

Supplemental interviews will be held the first week in February.

- Matrix Management Group will be interviewed Monday, February 1, 1993 from 1:00 to 2:30 p.m., Room 335.
- Cascade Pacific Engineering will be interviewed Tuesday, February 2, 1993 from 1:00 to (time not finalized), Room 335.

As we discussed, the interview will focus on the roles of the waste sort field crew, field coordinator, field supervisor / auditor, and project manager. We expect a brief overview and presentation of your proposal as in the first interview. Please let me know if you have any questions or concerns. I look forward to seeing you again.

Sincerely,


Bill Metzler
Project Manager

WM:gbc

cc: Bob Martin, Solid Waste Director
Terry Petersen, Planning & Technical Services Manager

s share metz.rfp interv2.ltr

METRO

2000 SW First Avenue
Portland, OR 97201-5398
(503) 221-1646
Fax 241-7417

January 27, 1993

Mr. David K. Luneke, P.E.
Cascade Pacific Engineering, Inc.
12300 SE Mallard Way, Suite 205
Milwaukie, OR 97222

Dear David:

Thank you for agreeing to participate in the upcoming supplemental interview for Metro's Comprehensive Waste Stream Characterization Study RFP. As you know, Bob Martin, the Solid Waste Director has requested that we more thoroughly review the recommendation of the selection committee. Accordingly, I have assembled a supplemental review team which will include the following individuals:

Bill Metzler	Project Manager
Debbie Gorham	Waste Reduction Manager
Terry Petersen	Solid Waste Planning & Technical Services Manager
Amha Hazen	Contracts Administrator
Craig Lewis	Solid Waste Contracts Compliance
Jim Goddard	Sr. Solid Waste Planner
Scott Klag,	Sr. Solid Waste Planner

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As we discussed, the interview will focus on the roles of the waste sort field crew, field coordinator, field supervisor / auditor, and project manager. We expect a brief overview and presentation of your proposal as in the first interview. Please let me know if you have any questions or concerns. I look forward to seeing you again.

Sincerely,


Bill Metzler
Project Manager

WM:gbc

cc: Bob Martin, Solid Waste Director
Terry Petersen, Planning & Technical Services Manager

METRO

2000 SW First Avenue
Portland, OR 97201-5398
(503) 221-1646
Fax 241-7417

January 15, 1993

Mr. Charles R. Scott
Senior Associate
Matrix Management Group
466 Colman Bldg., 811 - 1st Ave.
Seattle, Washington 98104-9983

RE: Notice of Conditional Award of a Contract for Study Elements I and II of the Metro Comprehensive Waste Stream Characterization Study (Study Element III is excluded)

Executive Officer
Rena Cusma

Metro Council

Jim Gardner
Presiding Officer
District 3

Judy Wyers
Deputy Presiding
Officer
District 8

Susan McLain
District 1

Lawrence Bauer
District 2

Richard Deylin
District 4

Edward P. Gronke
District 5

George Van Bergen
District 6

Ruth McFarland
District 7

Tanya Collier
District 9

Roger Buchanan
District 10

Ed Washington
District 11

Sandi Hansen
District 12

Dear Mr. Scott:

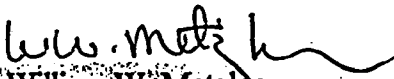
The Matrix Management Group has been conditionally awarded the contract for Study Elements I and II of the Metro Comprehensive Waste Stream Characterization Study.

Actual execution of a contract with The Matrix Management Group is subject to scope of work, project schedule, and reimbursement negotiations. In addition, approval from Metro's Procurement Management Division is required.

As a starting point for negotiations, I will send to you later next week, a copy of our standard contract form and a draft of the scope of work to be included with the contract. The scope of work will be consistent with what The Matrix Management Group submitted to Metro in its proposal dated December 14, 1992. We would like to refine and adjust some of the tasks identified in your proposal in order to better meet our needs.

We look forward to working with you on this project. Please feel free to contact me with any questions or suggestions you may have.

Sincerely,



William W. Metzler
Project Manager

WM:clk

cc: Bob Martin, Solid Waste Director
Terry Petersen, Planning and Technical Services Manager
Craig Lewis, Contract Compliance
Rich Wiley, Procurement Officer

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METRO

2000 SW First Avenue
Portland, OR 97201-5398
(503) 221-1646
Fax 241-7417

January 15, 1993

Mr. Kerrick Britz
Acting Regional Director
The Environmental Careers Organization
1218 Third Avenue, Suite 1515
Seattle, Washington 98101-3021

RE: Notice of Conditional Award of a Contract for Study Element III of the Metro
Comprehensive Waste Stream Characterization Study

Dear Mr. Britz:

The Environmental Careers Organization has been conditionally awarded the contract for
Study Element III of the Metro Comprehensive Waste Stream Characterization Study.

Actual execution of a contract with The Environmental Careers Organization is subject
to scope of work, project schedule, and reimbursement negotiations. In addition,
approval from Metro's Procurement Management Division is required.

As a starting point for negotiations, I will send to you later next week, a copy of our
standard contract form, a draft of the scope of work to be included with the contract,
and one of your completed project description forms. We would like to refine and adjust
some of the tasks identified in the RFP, in order to better meet our needs.

We look forward to working with you on this project. Please feel free to contact me
with any questions or suggestions you may have.

Sincerely,


William W. Metzler
Project Manager

WM:clk

cc: Bob Martin, Solid Waste Director
Terry Petersen, Planning and Technical Services Manager
Craig Lewis, Contract Compliance
Rich Wiley, Procurement Officer

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METRO

2000 SW First Avenue
Portland, OR 97201-5398
(503) 221-1646
Fax 241-7417

January 15, 1993

Mr. David K. Luneke, P.E.
President
Cascade Pacific Engineering, Inc.
12300 SE Mallard Way, Suite 205
Milwaukie, Oregon 97222

Re: Status of Conditional Contract Award for the Metro Comprehensive Waste
Stream Characterization Study

Executive Officer
Rena Cusma

Metro Council

Jim Gardner
Presiding Officer
District 3

Judy Wyers
Deputy Presiding
Officer
District 8

Susan McLain
District 1

Lawrence Bauer
District 2

Richard Devlin
District 4

Edward P. Gronke
District 5

George Van Bergen
District 6

Ruth McFarland
District 7

Tanya Collier
District 9

Roger Buchanan
District 10

Ed Washington
District 11

Sandi Hansen
District 12


Dear Mr. Luneke:

Thank you for submitting a proposal for the Comprehensive Waste Stream
Characterization Study.

We received three proposals for the project. The contract for Study Elements I and
II have been conditionally awarded to the Matrix Management Group. The contract
for Study Element III has been conditionally awarded to The Environmental Career
Organization.

We appreciate your interest in this project and the time you took to prepare the
proposal. The competitive Request for Proposal is an important part of Metro's
effort to conduct its operations efficiently and effectively. We hope that you would
continue to consider responding to future Metro RFPs.

Sincerely yours,


William W. Metzler
Project Manager

WM:clk

cc: Bob Martin, Solid Waste Director
Terry Petersen, Planning and Technical Services Manager
Craig Lewis, Contract Compliance
Rich Wiley, Procurement Officer

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PROPOSAL EVALUATION

Comprehensive Waste Stream Characterization Study

Background

Three proposals were submitted on December 14, 1992, in response to the Comprehensive Waste Stream Characterization Study proposal (RFP# 92R-33-SW). Proposals were submitted by Cascade Pacific Engineering, Matrix Management Group, and The Environmental Careers Organization.

The evaluation committee members were Bill Metzler (project manager), Scott Klag, and Jim Goddard.

Evaluation Process

Proposals were reviewed, evaluated and scored by the selection committee members. An evaluation form was used, based on the evaluation criteria set forth in the RFP. In addition, interviews with Matrix and Cascade were conducted by the selection committee.

The proposals were evaluated by Study Elements I, II and III, based on the following categories:

Compliance with RFP - 15 points
 Project organization - 15 points
 Work plan/Methodology - 20 points

Project staffing/Experience - 20 points
 Budget/Cost proposal - 30 points

Proposal Evaluations

Cascade Pacific :

- **General** - Proposal was organized but generally lacked detail and clarity.
- **Project Organization** - The Work Plan did not provide sufficient detail. Methodology was not described with sufficient clarity, referenced "previous projects" without any elaboration. Project management experience area of concern.
- **Work Plan/Methodology** -The Work Plan did not provide sufficient detail. Methodology was not described with sufficient clarity, referenced "previous projects" without any elaboration. Little discussion of methodology for sampling design or reliability. Concern for ability to perform number of sorts based on level of detail required. Study Element III not fully responsive (visual characterization not discussed).
- **Project Staffing Experience** - Experience of project manager with waste sorts seems very limited. Experience in solid waste field also appears minimal (field supervisor). There was limited demonstrated experience (with the exception of Mr. Luneke) with waste sorts by project manager and the field supervisor. Principle indicated he would ensure training, however only limited hours were reflected in the budget. Previous sorting crews (experienced) would be available.

- **Budget/Cost Proposal - Good.** Element III budget does not appear to include "visual characterization of waste"

Total score for Cascade Pacific by Study Element (maximum 100 each):

Element I	67	Element II	62.3	Element III	67.3
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Total General Score (100 maximum): 65.5

The Matrix Management Group :

- **General - Proposal was well-organized and clear.** Responses were very complete and understandable.
- **Project Organization - Very good.** Project management excellent, very experienced from project manager to crew leader including sort crews.
- **Work Plan/Methodology -The Work Plan provided good detail.** Methodology clearly described. Methodology for sampling design and reliability discussed in detail, very experienced. Emphasis on upfront planning for the study prior to starting work. Provides consistency with DEQ state-wide waste sort. Study Element III not fully responsive (visual characterization not included).
- **Project Staffing Experience -Team demonstrates excellent experience levels.** Strong local presence among team members. Concern about coordinating 5 subconsultants.
- **Budget/Cost Proposal - Generally, fair, but states that they are not able to stay within budget while providing for all Tasks within the Elements.** States clear concerns about budget. Provides options for budget adjustments. Appears flexible to make changes. Element III budget does not include "visual characterization of waste" Budget provided clear allocation of costs per tasks by team members.

Total score for Matrix by Study Element (Maximum 100 each):

Element I	88	Element II	82.66	Element III	76.6
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Total General Score (100 maximum): 82.4

The Environmental Careers Organization :

General - Proposal was unique and required special evaluation due to non-traditional nature of firm and proposal. It was determined that this firm should only be considered for Study Element III. Potential services they could provide include use of an employee on a full time basis to provide services for surveys and visual characterization. Cost and labor comparisons were very favorable when compared to proposals by both Matrix and Cascade. It was determined that this firm could provide required scope of work at budget. Metro staff would provide training for the specific tasks required.

Summary of Interviews

Interviews with the selection committee were conducted on January 7, 1993 with Cascade Pacific Team and on January 8, 1993 with the Matrix Management Group Team. The following is a summary of the selection committee interview results.

Cascade Pacific Team: Limited expertise and proposed project hours from people actually assigned to do the work (project manager, field supervisor). Sorting crew will have some experience, as they will use same people as previous sorts. Were not able to provide a higher degree of confidence than what they provided in their written proposal. Need to rely on project manager, however hours appear limited.

Matrix Team: Strong team. Appear more able to adjust and assist Metro with the various levels of complexity required in this waste sort (Study Elements I, II). Very good at addressing all issues. Approach is professional and flexible. Can provide high degree of confidence in team and results. Willing to explain issues. Willing to assist us in making budget reallocations where necessary. Are able to provide us with a range of statistical accuracy if we need to adjust Study Element areas. Team appears very well informed. Project Manager extremely competent as field coordinator. Field supervisor very capable and sort crew very experienced with level of detail required in RFP. Matrix has excellent local presence, even though they are based in Seattle. In general, more confident of teams expertise, approach and ability to manage the project, while providing an accurate, reliable product.

Conclusion

The evaluation committee scored Matrix Management Group highest in all categories. However, study element III was not appropriately addressed by either Matrix or Cascade. It was determined that the ECO could provide the full scope of required services, within budget.

Recommendation

The evaluation committee recommends that the Study Elements I and II of the Comprehensive Waste Stream Characterization Study be awarded to The Matrix Management Group and Study Element III be awarded to The Environmental Careers Organization.

Waste Sort Proposal Evaluation

Evaluation Committee: Bill Metzler, Scott Klag, Jim Goddard.

		Cascade Pacific			Matrix			ECO														
Evaluation Criteria	Max. Score per Element	B.M. Study Element			S.K. Study Element			J.G. Study Element														
		I	II	III	I	II	III	I	II	III												
General	15	13	12	12	10	8	10	10	10	10	15	15	15	10	10	10						
Organization	15	13	10	12	10	8	10	10	10	10	14	13	12	12	12	10	15	15	15	14	10	12
Methodology	20	15	15	12	10	10	15	5	8	10	20	17	16	15	15	15	19	19	18	10	15	10
Experience	20	18	15	13	12	8	15	15	15	15	20	18	17	18	15	15	18	18	18	20	15	15
Budget	30	30	28	28	20	15	15	10	15	15	25	25	15	20	15	15	25	25	25	30	15	30
<i>Subtotal</i>		89	80	77	62	49	65	50	58	60	94	87	74	78	69	65	92	92	91	84	65	77
Study Element Totals		I II III 67 62.3 67.3			I II III 88 82.6 76.6			I II III NA NA 75.3														
Total	100	82	58.66	56	85	70.6	91.6															
Averaged Totals	100	65.5			82.4																	

Supplemental Interviews
Comparison Table

CASCADE PACIFIC TEAM	MATRIX MANAGEMENT TEAM
Project Manager	Project Manager / Quality Control
Brian Balfour P.E. - Cascade Pacific	Charlie Scott Matrix Senior Associate
<i>Experience:</i> None for waste sorts, not been with Cascade very long see Resume. Not at 2nd interview. Not ranked well at 1st interview. No references.	<i>Experience:</i> Very experienced in both waste sorts and solid waste field. See Resume. Very good references-DEQ Peter Spendelow. At both interviews
Field Supervisor	Field Supervisor / Coordinator
Mart Huges - Cascade Pacific	Brad Andersen - Matrix
<i>Experience:</i> <u>None in waste sorts or solid waste field.</u> Not present at interviews. No references. May do driver interviews. Budgeted to be primary on-site supervisor/coordinator.	<i>Experience:</i> <u>Very experienced</u> with waste sorts DEQ and many others. Present at both interviews. Very capable. Will do driver interviews. Has demonstrated abilities. Very good references from DEQ. Budgeted to be primary on-site supervisor/coordinator
Sort Crew Supervisor	Sort Crew Supervisor
Emma - American Contractor Center	Nan Hage - Environmental Learning Center
<i>Experience:</i> No resume submitted, but has worked on previous waste sorts (Reidel/Metro). Not present at interviews.	<i>Experience:</i> Short resume submitted. Currently working on DEQ statewide sort. Present at 2nd interview. Very good presentation. Capable, knowledgeable and enthusiastic. Good reference from Peter Spendelow at DEQ.
Sort Crew	Sort Crew
American Contractor Center	Environmental Learning Center
<i>Experience:</i> Previous sorts (Metro / Reidel). Not experienced with high level of detail required for this study. Will require additional training.	<i>Experience:</i> Curently doing DEQ Statewide sorts. Experienced with high level of detail required in this study. Little additional training needed.
Sort Crew Selection and Training	Sort Crew Selection and Training
Bruce Brouard - American Contractors	Nan Hage - Environmental Lerarning Center
<i>Experience:</i> Previous Reidel/Metro sorts. Present at both interviews	<i>Experience:</i> Current DEQ State Wide sort. Present at 2nd interview.