

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF AUTHORIZING A ) RESOLUTION NO. 98-2663  
REQUEST FOR PROPOSALS FOR A )  
PERSONAL SERVICES CONTRACT TO ) Introduced by Mike Burton  
REPRESENT METRO BEFORE THE 1999 ) Executive Officer  
SESSION OF THE OREGON LEGISLATURE )

WHEREAS, Metro needs to maintain liaison with the state and federal legislature;  
and

WHEREAS, Funds were placed in the Support Services Materials & Services to be  
available for this purpose when an appropriate plan was presented to the Metro Council;  
and

WHEREAS, The request for proposals, attached as Exhibit "A," describes the  
proposal contents, evaluation criteria and scope of work, attached as Attachment A; and

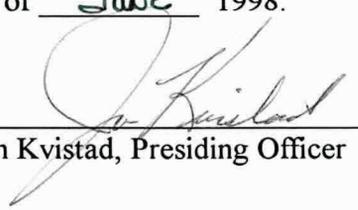
WHEREAS, The resolution was submitted by the Executive Officer and forwarded  
to the Metro Council for its approval; now, therefore,

BE IT RESOLVED;

1. That the Metro Council approves the release of the request for proposals,  
attached as Exhibit "A," for a personal services contract to represent Metro before the  
1999 session of the Oregon Legislature.

2. That the firm or individual submitting the highest ranking proposal shall be  
subject to Council confirmation prior to the execution of a personal services contract  
with the firm or individual.

ADOPTED by the Metro Council this 11<sup>th</sup> day of June 1998.

  
\_\_\_\_\_  
Jon Kvistad, Presiding Officer

Approved as to Form:

  
\_\_\_\_\_  
Daniel B Cooper, General Counsel

## **Exhibit "A"**

### **REQUEST FOR PROPOSALS**

#### **FOR**

#### **Personal Services Contract to Represent Metro Before The 1999 Session of the Oregon Legislature**

##### **I. INTRODUCTION**

The Office of the Executive of Metro, on behalf of the Metro Council, a metropolitan service district organized under the laws of the State of Oregon and the 1992 Metro Charter, located at 600 NE Grand Avenue, Portland, OR 97232-2736, is requesting proposals for a personal services contract to represent Metro during the 1999 Session of the Oregon Legislature. Proposals will be due no later than **3:00 p.m., Friday, July 17, 1998** in Metro's business offices at 600 NE Grand Avenue, Portland, OR 97232-2736. Details concerning the project and proposal are contained in this document.

##### **II. BACKGROUND/HISTORY OF PROJECT**

Metro has a need to manage and coordinate its legislative agenda for Fiscal Year 1998-99 and maintain ongoing contact with individual state legislators. During the 1997 legislative session, Metro contracted with an individual lobbying firm. Prior to that, for four legislative sessions, Metro contracted with the Special Districts Association (SDAO) for legislative contact and monitoring services associated with both the regular session and interim activities.

##### **III. PROPOSED SCOPE OF WORK/SCHEDULE**

Metro is seeking proposals from qualified firms and/or individuals to perform the following services and to deliver the products described in Attachment A.

#### IV. QUALIFICATIONS/EXPERIENCE

Proposers shall have the following experience:

1. Demonstrated success at lobbying/government relations with the Oregon Legislature for at least three legislative sessions.
2. Experience with, or ability to work with a government agency.
3. Excellent interpersonal and communication skills.
4. Excellent writing skills.
5. Ability to synthesize complex data and present in a format accessible to the legislators and general public.

#### V. CONTRACT ADMINISTRATION

Contract administration, including payment, billing and verification procedures, will be performed by the Metro Executive Officer.

#### VI. PROPOSAL INSTRUCTIONS

##### A. Submission of Proposals

5 copies of the proposal shall be furnished to Metro, addressed to:

Metro  
Office of the Executive/Attn: Ealy  
600 NE Grand Avenue  
Portland, OR 97232-2736

##### B. Deadline

Proposals will not be considered if received after **3:00 p.m., July 17, 1998.**

##### C. RFP as Basis for Proposals:

This Request for Proposals represents the most definitive statement Metro will make concerning the information upon which Proposals are to be based. Any verbal information which is not addressed in this RFP will not be considered by Metro in evaluating the Proposal. All questions relating to this RFP should be addressed to Randy Ealy at (503) 797-1501. Any questions, which in the opinion of Metro, warrant a written reply or RFP amendment will be furnished to all parties receiving this RFP.

**D. Information Release**

All proposers are hereby advised that Metro may solicit and secure background information based upon the information, including references, provided in response to this RFP. By submission of a proposal all proposers agree to such activity and release Metro from all claims arising from such activity.

**E. Minority and Women-Owned Business Program**

In the event that any subcontracts are to be utilized in the performance of this agreement, the proposer's attention is directed to Metro Code provisions 2.04.100.

Copies of that document are available from the Risk and Contracts Management Division of Administrative Services, Metro, Metro Center, 600 NE Grand Avenue, Portland, OR 97232 or call (503) 797-1714.

**VII. PROPOSAL CONTENTS**

The proposal should contain not more than 5 pages of written material (excluding biographies and brochures, which may be included in an appendix), describing the ability of the consultant to perform the work requested, as outlined below. The proposal should be submitted on recyclable, double-sided recycled paper (post consumer content). No waxed page dividers or non-recyclable materials should be included in the proposal.

- A. Transmittal Letter: Indicate who will be assigned to the project, who will be project manager, and that the proposal will be valid for ninety (90) days.
- B. Approach/Project Work Plan: Describe how the work will be done within the given timeframe and budget. Include a proposed work plan and schedule.
- C. Staffing/Project Manager Designation: Identify specific personnel assigned to major project tasks, their roles in relation to the work required, percent of their time on the project, and special qualifications they may bring to the project. Include resumes of individuals proposed for this contract.

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 any subconsultant work and shall be responsible for the day-to-day direction and internal management of the consultant effort.

- D. Experience: Indicate how your firm meets the experience requirements listed in section IV. of this RFP. List projects conducted over the past five years which involved services similar to the services required here. For each of these other projects, include the name of the customer contact person, his/her title, role on the project, and telephone number. Identify persons on the proposed project team who worked on each of the other projects listed, and their respective roles.
- E. Clients and Legislative Interests: Present a list of clients and legislative interests including the respective roles of staff proposed to represent Metro.
- F. Cost/Budget: Present the proposed cost of the contract and the proposed method of compensation. List hourly rates for personnel assigned to the contract, total personnel expenditures, support services, and subconsultant fees (if any). Requested expenses should also be listed. Metro has established a budget not to exceed \$60,000 for this contract.
- G. Exceptions and Comments: To facilitate evaluation of proposals, all responding firms will 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.

## VIII. GENERAL PROPOSAL/CONTRACT CONDITIONS

- A. Limitation and Award: This RFP does not commit Metro to the award of a contract, nor to pay any costs incurred in the preparation and submission of proposals in anticipation of a contract. Metro reserves the right to waive minor irregularities, accept or reject any or all proposals received as the result of this request, negotiate with all qualified sources, or to cancel all or part of this RFP.

- B. Billing Procedures: Proposers are informed that the billing procedures of the selected firm are subject to the review and prior approval of Metro before reimbursement of services can occur. Contractor's invoices shall include an itemized statement of the work done during the billing period, and will not be submitted more frequently than once a month. Metro shall pay Contractor within 30 days of receipt of an approved invoice.
- C. Validity Period 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 any company contacted during the period in which Metro is evaluating the proposal.
- D. Conflict of Interest. A Proposer filing a proposal thereby certifies that no officer, agent, or employee of Metro, or Metro, has a pecuniary interest in this proposal or has participated in contract negotiations on behalf of Metro; that the proposal is made in good faith without fraud, collusion, or connection of any kind with any other Proposer for the same call for proposals; the Proposer is competing solely in its own behalf without connection with, or obligation to, any undisclosed person or firm.

## IX. EVALUATION OF PROPOSALS

- A. Evaluation Procedure: Proposals received that conform to the proposal instructions will be evaluated. The evaluation will take place using the evaluation criteria identified in the following section. Interviews may be requested prior to final selection of one firm.
- 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.

### 35% Work Plan/Approach:

1. Demonstration of understanding of the contract objectives.
2. Client/issue compatibility with Metro.

**55% Experience:**

1. Experience and ability of firm and/or staff.
2. Resources and staff committed to contract.

**10% Budget/Cost Proposal:**

1. Practicality and value of proposed budget.
2. Commitment to budget and schedule parameters.

**X. NOTICE TO ALL PROPOSES-- STANDARD AGREEMENT**

The attached personal services agreement is a standard agreement approved for use by the Metro Office of General Counsel. This is the contract the successful proposer will enter into with Metro; it is included for your review prior to submitting a proposal. Failure to respond will be interpreted as acceptance of the standard terms and conditions for contract and subsequent changes will not be considered.

Attachment A

**SCOPE OF WORK**

1. **Description of the Work**

**A. 1999 Legislative Session**

The contractor will represent Metro before the 1999 session of the Oregon Legislature by arranging for introduction of any legislation which the agency requests to be put forth and monitoring all legislation which may impact Metro through daily attendance at committee meetings, work sessions and hearings, meetings with individual legislators and other appropriate means. The contractor will arrange for Metro testimony at hearings where appropriate or appear on behalf of Metro as directed by the Council and the Executive Officer and will advise Metro of any additional communication

**B. Contact with Individual Legislators**

The contractor will establish contact with individual legislators on behalf of Metro and will work with the Council and Executive Office to conduct a briefing for legislators prior to the beginning of the 1999 session.

**C. Coordination and Management of Contract**

Metro's legislative agenda is developed jointly between the Executive Officer and the Metro Council. Direction and supervision of the Scope of Work shall be accomplished through oversight by the Council Government Affairs Committee and the Executive Officer. The contractor shall report to the Metro Council at least once a month during the legislative session to transmit a progress report. Additional meetings may be scheduled upon request of any of the parties.

The contractor shall meet with Metro staff on a regular basis to ensure familiarity with Metro programs and issues. In addition, Metro will be represented at other meetings which are necessary to carry out the 1999 Legislative Agenda.

2. **Payment and Billing**

Contractor shall perform the above work for a maximum price not to exceed **SIXTY THOUSAND DOLLARS (\$60,000.00)** for the period of September 8, 1998 to June 30, 1999.

The maximum price includes all fees, costs and expenses of whatever nature. Contractor's billing statements will include an itemized statement of work done and expenses incurred during the billing period, will not be submitted more frequently than once a month, and will be sent to Metro, attention:

Accounts Payable, 600 NE Grand Avenue, Portland, OR 97232-2736.  
Metro will pay Contractor within 30 days of receipt of an approved billing statement.

**GOVERNMENTAL AFFAIRS COMMITTEE REPORT**  
**CONSIDERATION OF RESOLUTION 98-2663, FOR THE PURPOSE OF**  
**AUTHORIZING A REQUEST FOR PROPOSALS FOR A PERSONAL SERVICES**  
**CONTRACT TO REPRESENT METRO BEFORE THE 1999 SESSION OF THE**  
**OREGON LEGISLATURE**

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Date: June 2, 1998

Presented by: Councilor McLain

**Committee Action:**

At its June 1, 1998, meeting, the Governmental Affairs Committee voted to recommend to the full council adoption of Resolution 98-2663. Councilors McLain, Naito and McFarland voted in favor.

**Committee Discussion:**

There was no substantive discussion on this resolution.

## STAFF REPORT

### IN CONSIDERATION OF RESOLUTION NO. 98-2663 FOR THE PURPOSE OF AUTHORIZING A REQUEST FOR PROPOSALS FOR A PERSONAL SERVICES CONTRACT TO REPRESENT METRO BEFORE THE 1999 SESSION OF THE OREGON LEGISLATURE

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Date: May 4, 1998

Presented by: Mike Burton

#### PROPOSED ACTION:

Adoption of Resolution No. 98-2663 would authorize the Executive Officer to release a request for proposals and negotiate and execute a personal services contract to represent Metro before the 1999 session of the Oregon Legislature.

#### FACTUAL BACKGROUND AND ANALYSIS

Metro has a need to manage and coordinate its legislative agenda for Fiscal Year 1998-99 and maintain ongoing contact with individual state legislators. During the 1997 legislative session, Metro contracted with an individual lobbying firm for legislative contact and monitoring services associated with both the regular session and interim activities. Prior to 1997, Metro contracted for four legislative sessions with the Special Districts Association (SDAO).

The Executive Officer is initiating a Request for Proposals (Exhibit A) for a personal services contract to represent Metro before the 1999 session of the Oregon Legislature. The contractor shall perform the work described in Attachment A for a maximum price not to exceed \$60,000.00. The request for proposals seeks to secure the highest quality legislative representation of Metro at the lowest possible cost.

The Council approved \$75,000 in the Fiscal Year 1998-99 Contracted Professional Services for Public Affairs and Government Relations within the Office of the Executive Officer for this purpose pending a proposal for state and federal legislative activities.

#### Executive Officer's Recommendation:

The Executive Officer recommends adoption of Resolution No. 98-2663.