



RFP No. TRN086

PROFESSIONAL, TECHNICAL AND EXPERT SERVICES

**City of Portland, Oregon
May 3, 2010**

REQUEST FOR PROPOSALS

for

BIKEWAY PROJECT DEVELOPMENT

PROPOSALS DUE: Friday, May 21, 2010, by 4:00 p.m.

Envelope(s) shall be sealed and marked with RFP # and Project Title.

Submit one (1) original and five (5) complete copies plus one CD of the Proposal to:

City of Portland
Bureau of Transportation
1120 SW 5th Avenue, Suite 800
Portland, OR 97204

Refer questions to:

Patrick Boyd
Fax: (503) 865-3453
Email: patrick.boyd@portlandoregon.gov

GENERAL INSTRUCTIONS AND CONDITIONS

DIVERSITY IN EMPLOYMENT AND CONTRACTING REQUIREMENTS –

The City of Portland seeks to extend contracting opportunities to Minority Business Enterprises, Women Business Enterprises and Emerging Small Businesses (M/W/ESBs) in order to promote their economic growth and to provide additional competition for City contracts. Therefore, the City has established an overall 20% utilization goal in awarding PTE contracts to ESBs. No goal is set for the use of M/WBE firms, but the City is committed to ensuring that such firms receive opportunities and equal consideration to be awarded City PTE contracts.

ENVIRONMENTALLY PREFERABLE PROCUREMENT – In accordance with the City's Sustainable City Principles and the City's Sustainable Procurement Policy, the City of Portland values the use of products and services that minimize the negative human health and environmental impacts of City operations. Therefore, proposers are encouraged to incorporate environmentally preferable products or services into their responses wherever possible. "Environmentally preferable" means products or services that have a lesser or reduced effect on human health and the environment when compared with competing products or services that serve the same purpose. This comparison may consider raw materials acquisition, production, manufacturing, packaging, distribution, reuse, operation, maintenance, or disposal of the product or service. To view the above City policies go to www.portlandonline.com and navigate to "Charter, Code & Policies Documents".

INVESTIGATION – The Proposer shall make all investigations necessary to be informed regarding the service(s) to be performed under this request for proposal.

SPECIAL CONDITIONS – Where special conditions are written in the Request for Proposal, these special conditions shall take precedence over any conditions listed under the Professional, Technical and Expert Service "General Instructions and Conditions".

CLARIFICATION OF REQUEST FOR PROPOSAL – Proposers who request a clarification of the RFP requirements must submit questions in writing to the person(s) shown in the REFER QUESTIONS TO section on the cover of this RFP, or present them verbally at a scheduled pre-submittal conference, if one has been scheduled. The City must receive written questions no later than the date stated herein. The City will issue a response in the form of an addendum to the RFP if a substantive clarification is in order.

Oral instructions or information concerning the Request for Proposal given out by Bureau or Office managers, employees or agents to prospective Proposers shall not bind the City.

ADDENDUM – Any change to this RFP shall be made by written addendum issued no later than 72 hours prior to the proposal due date. The City is not responsible for any explanation, clarification or approval made or given in any manner except by addendum.

COST OF PROPOSAL – This Request for Proposal does not commit the City to pay any costs incurred by any Proposer in the submission of a proposal or in making necessary studies or designs for the preparation thereof, or for procuring or contracting for the services to be furnished under the Request for Proposal.

CANCELLATION – The City reserves the right to modify, revise or cancel this RFP. Receipt and evaluation of proposals or the completion of interviews do not obligate the City to award a contract.

LATE PROPOSALS – Proposals received after the scheduled closing time for filing will be returned to the Proposer unopened.

REJECTION OF PROPOSALS – The City reserves the right to reject any or all responses to the Request for Proposal if found in the City's best interest to do so. In the City's discretion, litigation between the City and a Proposer may be cause for proposal rejection, regardless of when that

litigation comes to the City's attention and regardless how the Proposer's proposal may have been scored. Proposals may also be rejected if they use subcontractors or subconsultants who are involved in litigation with the City. Proposers who are concerned about possible rejection on this basis should contact the City before submission of a proposal for a preliminary determination of whether its proposal will be rejected.

CITY OF PORTLAND BUSINESS LICENSE – Successful Proposer shall obtain a current City of Portland Business License prior to initiation of contract and commencement of the work.

WORKERS' COMPENSATION INSURANCE – Successful Proposer shall be covered by Workers' Compensation Insurance or shall provide evidence that State law does not require such coverage.

CERTIFICATION AS AN EEO AFFIRMATIVE ACTION EMPLOYER – Successful Proposers must be certified as Equal Employment Opportunity Affirmative Action Employers as prescribed by Chapter 3.100 of the Code of the City of Portland. The required documentation must be filed with Procurement Services, City of Portland, prior to contract execution.

EQUAL BENEFITS PROGRAM – Proposers must provide benefits to their employees with domestic partners equivalent to those provided to employees with spouses as prescribed by Chapter 3.100 of the Code of the City of Portland. The required documentation must be filed with Procurement Services, City of Portland, prior to contract execution.

CONFLICT OF INTEREST – A Proposer filing a proposal thereby certifies that no officer, agent or employee of the City who has a pecuniary interest in this Request for Proposal has participated in the contract negotiations on the part of the City, that the proposal is made in good faith without fraud, collusion or connection of any kind with any other Proposer of the same request for proposals, and that the Proposer is competing solely in its own behalf without connection with or obligation to, any undisclosed person or firm.

CONFIDENTIALITY – All information submitted by Proposers shall be public record and subject to disclosure pursuant to the Oregon Public Records Act (ORS 192.410 et seq.), except such portions of the proposals for which Proposer requests exception from disclosure consistent with Oregon Law. Any portion of a proposal that the Proposer claims constitutes a "trade secret" or is "confidential" must meet the requirements of ORS 192.501, ORS 192.502 and/or ORS 646.461 et seq. If the entire proposal is marked as constituting a "trade secret" or being "confidential," at the City's sole discretion, such a proposal may be rejected as non-responsive.

If a request to inspect the proposal is made, the City will notify the Proposer of the request. If the City refuses to release the records, the Proposer agrees to provide information sufficient to sustain its position to the District Attorney of Multnomah County, who currently considers such appeals. If the District Attorney orders that the records be disclosed, the City will notify the Proposer in order for the Proposer to take all appropriate legal action. The Proposer further agrees to hold harmless, defend and indemnify the City for all costs, expenses and attorney fees that may be imposed on the City as a result of appealing any decision regarding the Proposer's records.

The Chief Procurement Officer has the authority to waive minor irregularities and discrepancies that will not affect the competitiveness or fairness of the solicitation and selection process.

These Professional, Technical and Expert Services Request for Proposal "General Terms and Conditions" are not to be construed as exclusive remedies or as a limitation upon rights or remedies that may be or may become available under ORS Chapter 279.

PART I

CONTRACT REQUIREMENTS

SECTION A

GENERAL INFORMATION

1. INTRODUCTION

The Portland Bureau of Transportation (PBOT) is the steward of the City's transportation system and a community partner in shaping a livable city. We plan, build, manage, maintain and advocate for an effective and safe transportation system that provides access and mobility to all citizens and other stakeholders. We keep Portland moving. For more information about PBOT, see www.portlandonline.com/transportation/.

With the adoption of the *Portland Bicycle Plan for 2030*, PBOT is seeking a qualified consultant team to assist with project development for several bikeway projects identified in the plan. For more information on the *Portland Bicycle Plan for 2030*, see www.portlandonline.com/transportation/bicyclemasterplan/.

2. BACKGROUND

The Portland Bicycle Plan for 2030 sets a new direction for bikeway design and network completion in Portland. The plan emphasizes creating conditions to make bicycling more attractive than driving for short trips and completing a bikeway network that attracts new riders. A new generation of bikeway designs is envisioned to make riders feel safer and more comfortable than they would feel in standard bike lanes. Among the bikeway types the City aims to pilot and implement are a variety of separated in-roadway designs, including cycle tracks, buffered bike lanes, contra-flow bike lanes and wide bike lanes. More information about these innovative bikeway types can be found in *Bikeway Facility Design: A Survey of Best Practices*, the supplement to Appendix D of the Portland Bicycle Plan for 2030, which can be viewed or downloaded online at <http://www.portlandonline.com/transportation/bicyclemasterplan/>.

3. SCOPE OF WORK

The City of Portland, Bureau of Transportation is seeking proposals from individuals, firms, teams or consultants, hereafter called "Proposer(s)," with demonstrated experience in bikeway design and urban design, traffic analysis and signal analysis, public involvement, and public works project cost estimating. PBOT proposes to engage the successful Proposer for the following services:

The scope of work includes three phases.

Phase 1: Establish project objectives and schedule

Phase 2: Project development for five bikeway projects

- North Williams Bikeway Improvements
- N Vancouver Bicycle Access to Rose Quarter
- NE Holladay Street Bikeway Improvements
- 12th Avenue Banfield Overcrossing Bikeway Improvements
- N Willamette Boulevard Bikeway Improvements

Phase 3: Technical feasibility analyses for three potential bikeway projects

It is anticipated that work on multiple projects in Phase 2, and potentially work in Phases 2 and 3, would overlap in time.

4. PROJECT FUNDING

The anticipated cost for the services described herein is \$ 185,000. The Proposer's proposal shall include the Proposer's true estimated cost to perform the work irrespective of the City's budgeted funds for this work.

5. TIMELINE FOR SELECTION

The following dates are proposed as a timeline for this project:

Written proposals due at 4:00 p.m.	May 21, 2010
Announcement of short list Proposers	June 7, 2010
Interviews, if deemed necessary	Week of June 7, 2010
Selection committee recommendation	June 11, 2010
Contract negotiation with successful Proposer	June 21, 2010
Notice to proceed – work begins	July 1, 2010

The City reserves the right to make adjustments to the above noted schedule as necessary.

SECTION B

WORK REQUIREMENTS

1. TECHNICAL OR REQUIRED SERVICES

The successful Proposer shall perform the tasks listed below for this project, and shall be expected to work closely with designated City personnel to accomplish these goals:

TASKS

Phase 1: Establish project objectives and schedule

Proposer will meet with the Project Manager and other PBOT staff as needed to refine the approach, establish project objectives, and establish a schedule for the work.

Phase 2: For the five project development projects, tasks generally include, but are not limited to:

- Attend project kick-off meeting for each project
- Summarize existing traffic conditions
- Develop initial design concepts, refined concepts, and final recommended alternatives
- Analyze feasibility of initial design concepts, refined concepts, and final recommended alternatives
- Attend and support TAC meetings to review concept development
- Organize public workshops and report on workshop results
- Support City staff in visits to stakeholders
- Provide moderate confidence cost estimates for final alternatives
- Develop and deliver final report on each project

Not all tasks will be required for all projects in Phase 2 (see Deliverables).

Notes on projects in Phase 2:

North Williams Bikeway Improvements

Extent: N Williams, Weidler to Killingsworth

Brief problem statement: The existing 5' bike lane is very well used, especially at PM peak in inclement weather. Cyclists traveling at different speeds results in bunching and crowding, particularly between Broadway and Russell. There are also conflicts between bicycle traffic and bus operations.

Background: The Vancouver/Williams couplet has been studied for infill development and for traffic safety. Several traffic safety elements have been constructed. The City has built traffic model already and has recent traffic count data. A North Williams Business Association is in the process of forming and is interested in 'branding' Williams for bicycle use.

N Vancouver Bicycle Access to Rose Quarter

Extent: N Vancouver Ave, Broadway to Multnomah

Brief problem statement: N.Vancouver Avenue is a well-used bikeway with a continuous southbound bike lane from MLK to just north of Broadway, where it becomes a bus/bike lane. From this point to the Rose Quarter (via Wheeler to Multnomah) there are bike lane gaps. There is no bike lane on Vancouver

between Broadway and Weidler. A new southbound bike lane has recently been added to N Wheeler between Weidler and Winning Way, but south of Winning Way to NE Multnomah there is no southbound bike lane.

NE Holladay Street Bikeway Improvements

Extent: NE Holladay, Wheeler to 9th

Brief problem statement: A low-stress westbound bikeway is desired in this approximate corridor.

Background: The Lloyd Transportation Management Association has called for a car-free Holladay Street. The Portland Development Commission and other stakeholders are interested in undertaking a streetscape/green street study of Holladay.

12th Avenue Banfield Overcrossing Bikeway Improvements

Extent: NE 12th Avenue, Irving to Lloyd

Brief problem statement: The NE 12th Avenue overcrossing over I-84 is a critical link for many trips using the Lloyd Blvd, NE 12th Avenue, or NE Irving Street bikeways. These bikeways all have bike lanes, but the overcrossing does not.

Background: Pedestrian impacts could be significant in this project.

N Willamette Boulevard Bikeway Improvements

Extent: N Willamette Blvd, Rosa Parks to Woolsey

Brief problem statement: This roadway has two travel lanes, 4.5-foot bike lanes, and parking on the north/east side. The speed limit is 30 and the 85th percentile motor vehicle speed is above the limit. Cyclists travelling south/east are in a narrow curbside lane with traffic next to them. (North/west-bound cyclists can choose to ride in the parking lane, which is often empty.)

Background: Residents have previously appeared to lack interest in removing the on-street parking from this section of Willamette. A new pedestrian refuge island and short length of buffered bike lane is being added on Willamette at Wabash as part of another project.

Phase 3: For the three technical feasibility analyses, tasks generally include, but are not limited to:

- Attend Phase 3 kick-off meeting
- Summarize existing traffic conditions for the three study areas
- Develop initial concepts and refined concepts
- Analyze feasibility of initial concepts and refined concepts
- Attend and support TAC meetings to review concept development
- Develop deliver one final report on the technical feasibility analyses for three projects

Notes on the technical feasibility analyses:

Extent: The three study areas include:

- An urban corridor up to 20 blocks long to be determined in the Central City, probably a one-way corridor
- NE Glisan Street, 22nd to 28th Avenue
- Inbound and outbound access to/from downtown from/to the south across I-405

Brief problem statement: For the three study areas it is desirable to determine the feasibility of potential separated in-roadway bikeway designs in advance of developing design concepts to present to stakeholders and the public.

2. WORK PERFORMED BY THE CITY

PBOT has assigned a project manager to oversee the successful Proposer's work and provide support as needed. Specific duties the City will perform include:

- Overall management of the project process, scope, schedule, deliverables, and

budget

- Maintain ongoing communication with successful Proposer team, project stakeholders and agency partners
- Establish a Technical Advisory Committee (TAC) and schedule and facilitate meetings of the TAC
- Advertise and promote community workshops
- Provide the public face of the projects at the workshops and stakeholder meetings
- Provide technical support to the consultant team where appropriate

In addition, PBOT will make the following technical resources available for the successful Proposer's use:

- a Synchro/SimTraffic model for North Williams developed by PBOT staff
- traffic counts, wherever available
- geographic information systems base data
- public works cost estimating template

3. DELIVERABLES AND SCHEDULE

Deliverables shall be considered those tangible resulting work products that are to be delivered to the City such as reports, draft documents, data, interim findings, drawings, schematics, training, meeting presentations, final drawings and reports. The successful Proposer is encouraged to provide any deliverables in accordance with the City's Sustainable Paper Use Policy. The policy can be viewed at: <http://www.portlandonline.com/omf/index.cfm?c=37732>.

Proposers shall submit a not-to-exceed estimated amount for each deliverable listed below.

Deliverables and schedule for this project shall include:

Phase 1: Establish project objectives and schedule

- Project objectives list
- Project schedule

Phase 2: Project development for five bikeway projects

2.a. North Williams Bikeway Improvements

- Kickoff meeting and meeting notes
- Summary of existing traffic conditions
- Initial bikeway alternatives concept drawings and descriptions
- Traffic and parking issues identification for initial concepts
- TAC meeting #1 and meeting notes
- Workshop #1
- Workshop #1 summary notes
- Refined concept drawings and descriptions
- Traffic and parking analysis for refined concepts including:
 - Bicycle 'green wave' feasibility analysis
 - LOS/Capacity analysis as needed to evaluate the traffic performance of the refined concepts
 - Parking supply/demand evaluation as needed to evaluate the impact of parking modifications for the refined concepts
- TAC meeting #2 and meeting notes
- Up to five stakeholder visits
- Workshop #2
- Workshop #2 summary notes
- Final recommended alternatives drawings and descriptions
- Traffic and parking analysis of final alternatives
- Cost estimates for final alternatives
- TAC meeting #3 and meeting notes

- Draft final report
- Meeting with PM and meeting notes
- Final report

2.b.N Vancouver Bicycle Access to Rose Quarter

- Kickoff meeting and meeting notes
- Summary of existing traffic conditions
- Initial bikeway alternatives concept drawings and descriptions
- Traffic issue identification technical memorandum for initial concepts
- TAC meeting #1 and meeting notes
- Refined concept drawings and descriptions
- Traffic analysis for refined concepts including:
 - Synchro/Simtraffic traffic analysis
 - Queuing analysis
 - Bikeway 'suitability' evaluation
 - Transit operations evaluation
 - Evaluate traffic impacts including queue lengths for the SB I-5 off-ramp
- TAC meeting #2 and meeting notes
- Up to 3 stakeholder visits
- Final recommended alternatives drawings and descriptions
- Traffic and parking analysis of final alternatives
- Cost estimates for final alternatives
- TAC meeting #3 and meeting notes
- Draft final report
- Meeting with PM and meeting notes
- Final report

2.c.NE Holladay Street Bikeway Improvements

- Kickoff meeting and meeting notes
- Summary of existing traffic conditions
- Initial concept drawings and descriptions
- Traffic and parking issues identification for initial concepts
- TAC meeting #1 and meeting notes
- Workshop #1
- Workshop #1 summary notes
- Refined concept drawings and descriptions
- Traffic and parking analysis for refined concepts including:
 - Traffic signal control requirements related to westbound bicycle flow and LRT operations.
 - Parking supply/demand impact and parking revenue impact
- TAC meeting #2 and meeting notes
- Up to five stakeholder visits
- Workshop #2
- Workshop #2 summary notes
- Final recommended alternatives drawings and descriptions
- Traffic and parking analysis of final alternatives
- Cost estimates for final alternatives
- TAC meeting #3 and meeting notes
- Draft final report
- Meeting with PM and meeting notes
- Final report

2.d.12th Avenue Banfield Overcrossing Bikeway Improvements

- Kickoff meeting and meeting notes
- Summary of existing traffic conditions

- Initial bikeway alternatives concept drawings and descriptions
- Traffic issues identifications for initial concepts including:
 - Traffic flow constraints and queuing
 - Potential for bicycle/pedestrian conflicts
- TAC meeting #1 and meeting notes
- Refined concept drawings and descriptions
- Traffic analysis for refined concepts
- TAC meeting #2 and meeting notes
- Up to seven stakeholder visits
- Final recommended alternatives drawings and descriptions
- Traffic analysis for final alternatives
- Cost estimates for final alternatives
- TAC meeting #3 and meeting notes
- Draft final report
- Meeting with PM and meeting notes
- Final report

2.e. N Willamette Boulevard Bikeway Improvements

- Kickoff meeting and meeting notes
- Summary of existing traffic conditions
- Initial bikeway alternatives concept drawings and descriptions
- Traffic and parking issues identification for initial concepts
- TAC meeting #1 and meeting notes
- Workshop #1
- Workshop #1 summary notes
- Refined concept drawings and descriptions
- Traffic and parking analysis for refined concepts including:
 - Parking demand/supply evaluation
- TAC meeting #2 and meeting notes
- Up to two stakeholder visits
- Workshop #2
- Workshop #2 summary notes
- Final recommended alternatives drawings and descriptions
- Traffic and parking analysis for final alternatives
- Cost estimates for final alternatives
- TAC meeting #3 and meeting notes
- Draft final report
- Meeting with PM and meeting notes
- Final report

Phase 3: Technical feasibility analyses for three potential bikeway projects

- Kickoff meeting and meeting notes
- Summary of existing traffic conditions for each potential project
- Initial Concept drawings and descriptions for each potential project
- Traffic and parking analysis issues identification for each potential project
- TAC meeting and meeting notes
- Refined concept drawings and descriptions for each potential project
- Traffic and parking analysis feasibility evaluation including:
 - Parking/supply demand, and revenue evaluation
 - Traffic performance evaluation for LOS/capacity
- TAC meeting and meeting notes
- Draft final report
- PM meeting and meeting notes
- Final report

In addition to the above deliverables, submit a monthly status report including subconsultant payment and utilization report by the 15th of each month (reference Part II, Section C.5 of the RFP).

All deliverables and resulting work products from this contract will become the property of the City of Portland.

4. PLACE OF PERFORMANCE

Contract performance will take place primarily at the Proposer's facility. On occasion and as appropriate, work will be performed at City facilities, a third-party location or any combination thereof.

5. PERIOD OF PERFORMANCE

The City anticipates having the successful Proposer begin work immediately upon contract execution with submittal of final deliverables to the City occurring by May 28, 2011.

Proposals containing earlier completion of the deliverables are acceptable and encouraged.

6. PUBLIC SAFETY

Public safety may require limiting access to public work sites, public facilities, and public offices, sometimes without advance notice. The Proposer shall anticipate delays in such places and include the cost of delay in the proposed cost. The successful Proposer's employees and agents shall carry sufficient identification to show by whom they are employed and display it upon request to security personnel. City project managers have discretion to require the successful Proposer's employees and agents to be escorted to and from any public office, facility or work site if national or local security appears to require it.

7. INSURANCE

The successful Proposer(s) shall agree to maintain continuous, uninterrupted coverage of all insurance as required by the City. There shall be no cancellation, material change, reduction of limits or intent not to renew the insurance coverage(s) without a 30-day written notice, or a 10-day written notice for non-payment from the successful Proposer or its insurer(s) to the City.

Workers' Compensation Insurance in compliance with ORS 656.017, which requires subject employers to provide Oregon workers' compensation coverage for all their subject workers (firms with one or more employees, unless exempt under ORS 656.027).

General Liability Insurance with a combined single limit of not less than \$1,000,000 per occurrence for Bodily Injury and Property Damage. It shall include contractual liability coverage for the indemnity provided under this contract, and shall provide that the City of Portland, and its agents, officers, and employees are Additional Insureds but only with respect to the successful Proposer's services to be provided under this Contract.

Automobile Liability Insurance with a combined single limit of not less than \$1,000,000 per occurrence for Bodily Injury and Property Damage, including coverage for owned, hired, or non-owned vehicles, as applicable.

Professional Liability Insurance with a combined single limit of not less than \$1,000,000 per claim, incident, or occurrence. This is to cover damages caused by negligent acts, errors or omissions related to the professional services to be provided under this contract. If insurance coverage is provided on a "claims made" basis, the successful Proposer shall acquire a "tail" coverage or continue the same coverage for three years after completion of the contract, provided coverage is available and economically feasible. If such coverage is not available or economically feasible, contractor shall notify City immediately.

Certificates of Insurance: As evidence of the insurance coverages, the successful Proposer shall furnish acceptable insurance certificates to the City at the time signed

contracts are returned to the City. The certificate will specify all of the parties who are Additional Insureds and will include a 30-day cancellation clause a 10-day non-payment clause as identified above. Insuring companies or entities are subject to City acceptance. If requested, complete policy copies shall be provided to the City. The successful Proposer shall be financially responsible for all pertinent deductibles, self-insured retentions, and/or self-insurance.

SECTION C

1. INDEX

2. SAMPLE CONTRACT

3. PROJECT DATA

ATTACHMENTS

Exhibit A First Tier Subconsultant Disclosure Form (submit with proposal)

The Professional, Technical and Expert Services Contract is the City's standard contract and will be used as a result of this selection process. A sample contract can be viewed at: <http://www.portlandonline.com/shared/cfm/image.cfm?id=27067>.

Reference project maps for the five bikeway project development projects can be viewed or downloaded from ftp://ftp02.portlandoregon.gov/PBOT/Bikeway_Development/

PART II

PROPOSAL PREPARATION AND SUBMITTAL

SECTION A

PRE-SUBMITTAL MEETING/CLARIFICATION

1. PRE-SUBMITTAL MEETING
2. RFP CLARIFICATION

There will be no pre-submittal meeting or site visit scheduled for this project.

Questions and requests for clarification regarding this Request for Proposal must be directed in writing, via email or fax, to the person listed below. **The deadline for submitting such questions/clarifications is Friday, May 14, 2010.** An addendum will be issued no later than 72 hours prior to the proposal due date to all recorded holders of the RFP if a substantive clarification is in order.

Patrick Boyd
Bureau of Transportation
E-mail: patrick.boyd@portlandoregon.gov
Fax: (503) 865-3453

SECTION B

PROPOSAL SUBMISSION

1. PROPOSALS DUE

Sealed proposals must be received no later than the date and time, and at the location, specified on the cover of this solicitation. The outside of the envelope shall plainly identify the subject of the proposal, the RFP number and the name and address of the Proposer. It is the Proposer's responsibility to ensure that proposals are received prior to the specified closing date and time, and at the location specified. Proposals received after the specified closing date and/or time shall not be considered and will be returned to the Proposer unopened. The City shall not be responsible for the proper identification and handling of any proposals submitted to an incorrect location.

2. PROPOSAL

Proposals must be clear, succinct and not exceed 24 pages. Section dividers, title page, and table of contents do not count in the overall page count of the proposal. Proposers who submit more than the pages indicated may not have the additional pages of the proposal read or considered.

For purposes of review and in the interest of the City's Sustainable Paper Use Policy and sustainable business practices in general, the City encourages the use of submittal materials (i.e. paper, dividers, binders, brochures, etc.) that contain post-consumer recycled content and are readily recyclable. The City discourages the use of materials that cannot be readily recycled such as PVC (vinyl) binders, spiral bindings, and plastic or glossy covers or dividers. Alternative bindings such as reusable/recyclable binding posts, reusable binder clips or binder rings, and recyclable cardboard/paperboard binders are examples of preferable submittal materials. Proposers are encouraged to print/copy on both sides of a single sheet of paper wherever applicable; if sheets are printed on both sides, it is considered to be two pages. Color is acceptable, but content should not be lost by black-and-white printing or copying.

All submittals will be evaluated on the completeness and quality of the content. Only those Proposers providing complete information as required will be considered for evaluation. The ability to follow these instructions demonstrates attention to detail.

3. ORGANIZATION OF PROPOSAL

Proposers must provide all information as requested in this Request for Proposal (RFP). Responses must follow the format outlined in this RFP. Additional materials in other formats, or pages beyond the stated page limit(s), may not be considered. The City may reject as non-responsive at its sole discretion any proposal or any part thereof, which is incomplete, inadequate in its response, or departs in any substantive way from the required

format. Proposal responses shall be organized in the following manner:

1. Cover Letter
2. Project Team
3. Proposer's Capabilities
4. Project Approach and Understanding
5. Diversity in Employment and Contracting Requirements
6. Proposed Cost
7. A completed First Tier Subconsultant Disclosure Form (refer to Part II.C.5)

SECTION C

EVALUATION CRITERIA

1. COVER LETTER

By submitting a response, the Proposer is accepting the General Instructions and Conditions of this Request for Proposal (reference second page of the RFP) and the Standard Contract Provisions of the Professional, Technical and Expert Services contract.

The Cover Letter must include the following:

- RFP number and project title
- name(s) of the person(s) authorized to represent the Proposer in any negotiations
- name(s) of the person(s) authorized to sign any contract that may result
- contact person's name, mailing or street addresses, phone and fax numbers and email addresses

A legal representative of the Proposer, authorized to bind the Proposer in contractual matters must sign the Cover Letter.

BUSINESS COMPLIANCE

The successful Proposer(s) must be in compliance with the laws regarding conducting business in the City of Portland before an award may be made. The Proposer shall be responsible for the following:

Certification as an EEO Affirmative Action Employer

The successful Proposer(s) must be certified as Equal Employment Opportunity Employers as prescribed by Chapter 3.100 of the Code of the City of Portland prior to contract award. Details of certification requirements are available from Procurement Services, 1120 SW Fifth Avenue, Room 750, Portland, Oregon 97204, (503) 823-6855, website: <http://www.portlandonline.com/omf/purchasing>

Non-Discrimination in Employee Benefits (Equal Benefits)

Proposers are encouraged to submit the Equal Benefits Compliance Worksheet/Declaration Form with their response. If not submitted, you will be contacted and required to provide this form prior to contract award; otherwise your proposal may be rejected. If your company does not comply with Equal Benefits and does not intend to do so, you must still submit the Form. The Equal Benefits Compliance Worksheet/Declaration Form can be obtained from the following web site: <http://www.portlandonline.com/omf/purchasing>

- ☐ Fill out the form properly. You may call Procurement Services at 503-823-6855 to ensure you correctly complete the form. You may also call the contact listed on the front page of this solicitation document for assistance.
- ☐ There are five options on the Worksheet/Declaration Form from which to select. They range from full compliance (Options A, B, C), to one that requires advance authorization by the City (Option D – Delayed Compliance), to Non Compliance. Select the option that is true of your company's standing at the time you submit your proposal. You cannot change your answer after you submit the Worksheet/Declaration Form.

- ☐ Option D is only used if you have an official waiver from the City. Waivers are only issued by Procurement Services.
- ☐ The Form provides the City with your declared Equal Benefit status. However, the City issues the final determination of your Equal Benefit status for purposes of contract award.

If information on your form is conflicting or not clearly supported by the documentation that the City receives, the City may seek clarification to ensure we properly classify your compliance.

Business License

The successful Proposer(s) must be in compliance with the City of Portland Business License requirements as prescribed by Chapter 7.02 of the Code of the City of Portland prior to contract award. Details of compliance requirements are available from the Revenue Bureau License and Tax Division, 111 SW Columbia Street, Suite 600, Portland, Oregon 97201, (503) 823-5157, website: <http://www.portlandonline.com/omf/index.cfm?c=29320>

If your firm currently has a business license and is EEO certified, include in the Cover Letter your firm's City of Portland Business License number as well as the Equal Employment Opportunity (EEO) expiration date.

2. PROJECT TEAM

Criteria for evaluating the project team include generally:

- (1) How well does the Proposer's qualifications and experience relate to this specific project?
- (2) Does the expertise of the Proposer cover all phases of the project?

Specifically, the proposal should address:

- The Proposer's expertise in the following areas:
 - Bikeway design and urban design
 - Develop and analyze design alternatives
 - Traffic Analysis
 - Provide traffic analysis data compatible with Synchro/SimTraffic
 - Public Involvement
 - Organize and facilitate community workshops, including scouting and booking locations and organizing logistics
 - Public works cost estimating
- Approximate number of people to be assigned to the project.
- Extent of company's principal member's involvement.
- Team qualifications and experience on similar or related projects:
 - qualifications and relevant experience of prime consultant
 - qualifications and relevant experience of sub-consultants, if any
 - project manager's experience with similar projects
- Names of key members who will be performing the work on this project, and:
 - their responsibilities on this project
 - current assignments and location
 - experience on similar or related projects
 - unique qualifications
 - percentage of their time that will be devoted to the project
- a. Management Approach
 - Demonstrate a clear understanding of project approach and proposed process.
 - Demonstrate effective project management and efficient team organization.
 - Describe or provide a detailed description of firm's approach to overall management and integration of all activities required by the scope of work,

including the management objectives and techniques that demonstrate how the work requirements will be met.

- Include organizational charts or a statement regarding lines of authority and responsibility, and a statement regarding how the Proposer is prepared to respond promptly to problems and any changes to scope of work.

b. Key Personnel

- Describe the education background, directly related work experience, professional development, and demonstrated performance record of the proposed key personnel: project principal, project manager and key project team members, including any subconsultants.
- Describe the availability of proposed key personnel over the timeframe of this project.

3. PROPOSER'S CAPABILITIES

- Describe similar projects performed by the team or team members, especially those that best characterize capabilities, work quality and cost control of the firm or team. Please provide at least two related project references with contact names and phone numbers.
- Describe the resources available the firm or team to perform the work for the duration of the project.
- Describe the internal procedures and/or policies associated or related to work quality and cost control for the firm or team.
- Describe the management and organizational capabilities of the firm or team.

4. PROJECT APPROACH AND UNDERSTANDING

- Describe the proposed work tasks and activities, the methodology that will be used to accomplish them, and identify the team members who will work on each task.
- Describe the proposed work products that will result from each task or activity.
- Identify points of input and review with City staff.
- Identify the timeframe estimated to complete each task.

5. DIVERSITY IN EMPLOYMENT AND CONTRACTING REQUIREMENTS

The City is committed to increasing contracting opportunities for State of Oregon certified minority, women and emerging small business (M/W/ESB) enterprises. The City values, supports and nurtures diversity, and encourages any firm contracting with the City to do the same, maximizing M/W/ESB business participation with regard to all City contracts. As such, the City has established an overall 20% utilization goal in awarding PTE contracts to State of Oregon certified emerging small business (ESB) enterprises. The City has assigned at least 15% of the total points available on this solicitation to determine the award of this contract. No goal is set for the use of minority (MBE) and women business (WBE) enterprises, but the City is committed to ensuring that such firms receive opportunities and equal consideration to be awarded City PTE contracts.

All Proposers shall address the following in their proposals:

- a. Indicate if your firm is currently certified in the State of Oregon as an MBE, WBE and/or ESB, or if your firm has applied for certification with the State of Oregon's Office of Minority, Women and Emerging Small Business (OMWESB). Provide a copy of the State of Oregon certification letter confirming receipt of application or copy of the approval letter certifying your firm (a copy of this letter does not affect the page-limit identified under Part II, Section B.2 of this document).
- b. Identify your current diversity of workforce and describe your firm's commitments to providing equal employment opportunities. Include in your response:
 - Number of total employees and description of type of work performed.
 - Number of minorities and women within your current workforce, broken out by ethnicity and positions held.
 - Any underutilization of minorities or women within your workforce and your firm's

- efforts to remedy such underutilization.
 - Any plans to provide innovative mentoring, technical training or professional development opportunities to minorities and women in your workforce in relation to this project, or plans to employ minorities and women to work on this project.
 - Description of the process your firm uses to recruit minorities and women.
- c. Have you subcontracted or partnered with State of Oregon certified M/W/ESB firms on any project within the last 12 months? If so, please describe the history of the firm's subcontracting and partnering with certified M/W/ESB firms. Include in your response:
- List of State of Oregon certified M/W/ESB firms with which your firm has had a contractual relationship during the last 12 months.
 - Any innovative or successful measures that your firm has undertaken to work with M/W/ESB firms on previous projects.
 - Any mentoring, technical or other business development services your firm has provided to previous or current M/W/ESB subconsultants or partners, or will provide in relation to this project.
- d. Are you subcontracting any element of your proposal? Describe your firm's plan for obtaining maximum utilization of State of Oregon certified M/W/ESB firms on this project. Include in your response:
- Subcontracting opportunities your firm has identified in the scope of this project.
 - Efforts made relating to outreach and recruitment of certified M/W/ESB firms. Did your firm advertise contracting opportunities in the *Daily Journal of Commerce*, *Skanner*, *Oregonian*, *Observer*, *El Hispanic News*, *Asian Reporter*, and/or other trade publications? Did your firm conduct any outreach meetings? Did your firm use the State's OMWESB certification list, or other source, as a basis for direct outreach? What were the actual results of any of the above efforts?
 - Any proposals received from certified M/W/ESB firms. If any such proposals were rejected, provide reasons for rejection.
 - Other efforts your firm used or proposes to use in relation to this project.
- e. If your firm will be utilizing State of Oregon certified M/W/ESB firms on this project, please list those firms and detail their role within your proposal. In addition, **all Proposers must submit Exhibit A - First Tier Subconsultant Disclosure Form 1** with their proposal, which requires Proposers to identify the following:
- The names of **all** subconsultants to be used on this project with subcontracts greater than or equal to \$10,000.
 - The names of all State of Oregon certified MBE, WBE and ESB firms. If firms have more than one certification (i.e., ESB and MBE, and/or ESB and WBE) note that on the form so that proper credit can be given for the ESB goal and for tracking MBE and WBE utilization.
 - The proposed scope or category of work for each subconsultant.
- If Proposers will not be using any subconsultants that are subject to the above disclosure requirements, Proposers are required to indicate "**NONE**" on the First Tier Subconsultant Disclosure Form 1.

The City expects thoughtful consideration of all of the above Diversity in Employment and Contracting criteria in the preparation of proposals. The City will enforce all diversity in workforce and M/W/ESB commitments submitted by the successful Proposer, and the successful Proposer will be required to submit a completed Monthly Subconsultant Payment and Utilization Report to ensure that subconsultants are utilized to the extent originally proposed and submitted in its proposal. The successful Proposer will not be permitted at any time to substitute or add a subconsultant without the prior written approval of the Chief Procurement Officer. ALL subconsultants, including M/W/ESB firms, and first tier subconsultants shall be reported on the Monthly Subconsultant Payment and Utilization Report as well as contract amounts and payments. For reference, a copy of this form may be obtained at: <http://www.portlandonline.com/shared/cfm/image.cfm?id=119851>.

6. PROPOSED COST

The proposal shall include the Proposer's total estimated cost or fixed-price estimate for the proposed project irrespective of the City's anticipated cost. Additionally, the Proposed Cost section shall include for reference purposes only the hourly rate of each person to be associated with this project, and the total number of hours each person is expected to work on the entire project.

PART III

PROPOSAL EVALUATION

SECTION A

PROPOSAL REVIEW AND SELECTION

1. EVALUATION CRITERIA SCORING

Each proposal shall be evaluated on the following evaluation criteria, weighting and maximum points, as follows:

Criteria		Maximum Score
a.	Cover Letter	0
b.	Project Team	25
c.	Proposer's Capabilities	20
d.	Project Approach and Understanding	25
e.	Diversity in Employment and Contracting	15
f.	Proposed Cost	15
Total Points Available		100

2. PROPOSAL REVIEW

An evaluation review committee will be appointed to evaluate the proposals received. For the purpose of scoring proposals, each committee member will evaluate each proposal in accordance with the criteria and point factors listed above. The evaluation committee may seek outside expertise, including but not limited to input from technical advisors, to assist in the evaluation process.

The successful Proposer shall be selected by the following process:

- a. An evaluation committee will be appointed to evaluate submitted written proposals.
- b. The committee will score the written proposals based on the information submitted according to the evaluation criteria and point factors.
- c. The committee will require a minimum of 10 working days to evaluate and score the written proposals.
- d. A short list of Proposers, based on the highest scores, may be selected for oral interviews if deemed necessary. The City reserves the right to increase or decrease the number of Proposers on the short list depending on the scoring and whether the Proposers have a reasonable chance of being awarded a contract.
- e. If oral interviews are determined to be necessary, the scores from the written proposals will be considered preliminary. Final scores, based on the same evaluation criteria, will be determined following the interviews.

All communications shall be through the contact(s) referenced in Part II, Section A.2 of the RFP. At the City's sole discretion, communications with members of the evaluation committee, other City staff or elected City officials for the purpose of unfairly influencing the outcome of this RFP may be cause for the Proposer's proposal to be rejected and disqualified from further consideration.

For contracts over \$100,000, the evaluation committee's recommendation for contract award will be submitted to the Portland City Council for approval. The City has the right to reject any or all proposals for good cause, in the public interest.

NOTE: In the City's discretion, litigation between the City and a Proposer shall be cause for proposal rejection, regardless of when that litigation comes to the City's attention and regardless how the Proposer's proposal may have been scored. Proposals may also be rejected if they use subcontractors or subconsultants who are involved in litigation with the City. Proposers concerned about possible rejection on this basis should contact the City before submission of a proposal for a preliminary determination of whether its proposal will be rejected.

3. CLARIFYING PROPOSAL DURING EVALUATION

At any point during the evaluation process, the City is permitted, but not required, to seek clarification of a proposal. However, a request for clarification does not permit changes to a proposal.

SECTION B

CONTRACT AWARD

1. CONSULTANT SELECTION

The City will attempt to reach a final agreement with the highest scoring Proposer. However, the City may, in its sole discretion, terminate negotiations and reject the proposal if it appears agreement cannot be reached. The City may then attempt to reach a final agreement with the second highest scoring Proposer and may continue on, in the same manner, with remaining proposers until an agreement is reached. A consultant selection process will be carried out under Portland City Code Chapter 5.68.

2. CONTRACT DEVELOPMENT

The proposal and all responses provided by the successful Proposer may become a part of the final contract. The form of contract shall be the City's Contract for PTE Services.

3. AWARD REVIEW AND PROTESTS

REVIEW:

Following the Notice of Intent to Award, the public may view proposal documents. However, any proprietary information so designated by the Proposer as a trade secret or confidential and meeting the requirements of ORS 192.501, 192.502 and/or ORS 646.461 et seq., will not be disclosed unless the Multnomah County District Attorney determines that disclosure is required. At this time, Proposers not awarded the contract may seek additional clarification or debriefing, request time to review the selection procedures or discuss the scoring methods utilized by the evaluation committee.

PROTESTS OF CONTRACT AWARDS:

Protests may be submitted to the Chief Procurement Officer only for formal contracts (reference <http://www.portlandonline.com/omf/index.cfm?a=74585&c=27353>), and only from those Proposers who would receive the contract if their protest were successful.

Protests must be received by the Chief Procurement Officer within seven (7) calendar days, UNLESS OTHERWISE NOTED, following the date the City's Notice of Intent to Award was issued. The protest must specifically state the reason for the protest and show how its proposal or the winning proposal was mis-scored or show how the selection process deviated from that described in the solicitation document. No Contract will be awarded until the protest has been resolved.

Protests must be timely and must include all legal and factual information regarding the protest, and a statement of the form of relief requested. Protests received later than specified or from other than the Proposer who would receive the contract if the protest was successful will not be considered. The exercise of judgment used by the evaluators in scoring the written proposals and interviews, including the use of outside expertise, is not grounds for appeal.

The Chief Procurement Officer may waive any procedural irregularities that had no material affect on the selection of the proposed contractor, invalidate the proposed award, amend the award decision, request the evaluation committee re-evaluate any proposal or require the bureau to cancel the solicitation and begin again to solicit new proposals. In the event the matter is returned to the evaluation committee, the Chief Procurement Officer shall issue a notice canceling the Notice of Intent to Award.

Decisions of the Chief Procurement Officer are final and conclude the administrative appeals process.

EXHIBIT A

CITY OF PORTLAND PROFESSIONAL TECHNICAL & EXPERT (PTE) SERVICES FIRST TIER SUBCONSULTANT DISCLOSURE FORM

CITY PTE DISCLOSURE REQUIREMENTS

The City's disclosure program was adopted to document the use of subconsultants on City projects over \$100,000; particularly Oregon certified Minority, Women and Emerging Small Businesses (M/W/ESBs).

This Request for Proposal requires submission by the Proposer of the First Tier Subconsultant Disclosure Form. When the contract amount of a first-tier subconsultant furnishing services, labor or labor and materials would be greater than or equal to \$10,000, the Proposer must disclose the following information about such subconsultants:

- 1) The subconsultant's contact information
- 2) State of Oregon M/W/ESB designation
(*Verify certification status with the Office of Minority, Women and Emerging Small Business at <http://egov.oregon.gov/DCBS/OMWESB/index.shtml>*)
- 3) The proposed scope or category of work that the subconsultant will be performing
- 4) The amount of the subconsultant's contract

If the Proposer will not be using any subconsultants that are subject to the above disclosure requirements, the Proposer is required to indicate "**NONE**" on the accompanying form.

ATTACHMENTS: Form 1: City of Portland PTE First Tier Subconsultant Disclosure Form

**CITY OF PORTLAND
PTE FIRST TIER SUBCONSULTANT DISCLOSURE FORM
(FORM 1)**

This Request for Proposal requires submission by the Proposer of the First Tier Subconsultant Disclosure Form. When the contract amount of a first tier subconsultant furnishing services, labor or labor and materials would be greater than or equal to \$10,000, the Proposer must disclose the following information about that subconsultant.

Proposer Name: _____

Proposed Cost: _____

RFP Number: _____

Project Name: _____

SUBCONSULTANT INFORMATION (Please Print)	M/W/ESB	SCOPE/TYPE OF WORK	SUBCONTRACT AMOUNT
Firm Name: Phone #: Fax #:			\$
Firm Name: Phone #: Fax #:			\$
Firm Name: Phone #: Fax #:			\$
Firm Name: Phone #: Fax #:			\$
Firm Name: Phone #: Fax #:			\$
Firm Name: Phone #: Fax #:			\$

NOTE:

- 1) If the Proposer will not be using any subconsultants that are subject to the above disclosure requirements, the Proposer is required to indicate "NONE" on this form.
- 2) All subconsultants with contracts \$10,000 or over must be listed on this form. Leave M/W/ESB column blank if firm is not confirmed certified through the *State of Oregon Office of Minority, Women and Emerging Small Business*: <http://egov.oregon.gov/DCBS/OMWESB/index.shtml>.