



Port of Umpqua

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August 2010

REQUEST FOR PROPOSALS

Strategic Business Plan (SBP)

1. Background and Services Required

The Port is seeking assistance from firms with expertise in planning and economic consulting services related to Port activities, including development and/or redevelopment of port-related properties. The Port will retain the professional services of a qualified consulting firm to assist the Port in preparing a Strategic Business Plan. The following Request for Proposals conforms to the Oregon Business Development Department Port Strategic Plan Template and is being funded in part by the Business Oregon Infrastructure Finance Authority through the Port Planning and Marketing Fund and in part by the Port of Umpqua.

A minimum of six (6) bound copies and an electronic copy (file format: Adobe PDF) shall be provided to the Port upon completion of the plan being finalized.

2. Scope of Work

Please review the Scope of Work attached separately.

3. Proposal Form and Content

Proposal should be prepared simply and economically, providing straightforward, concise descriptions of the Proposer's abilities to satisfy the requirements of the Port's RFP. Emphasis should be placed upon completeness and clarity of content. To be considered to perform the services requested, a firm or group must submit a proposal demonstrating current relevant experience with ports, property and economic development planning, property development and/or redevelopment efforts, and organizational analysis. Proposals shall be brief and concise, containing no more than 20 pages of material including the cover letter and resumes but excluding example staff report, personal services contract and cost schedule. Proposals should be printed one-sided, black and white (no color or grayscale) on 8-1/2" x 11" paper for ease of handling. Submittals in excess of 20 pages shall be considered non-responsive. Include one hard copy of the proposal and a digital (.pdf) version on CD or equivalent media. Also include a sample personal services contract in editable format (e.g. MS Word) on CD. Proposals shall include the following:

- A. Cover letter: All proposals must include a cover letter signed by a duly constituted official legally authorized to bind the Proposer to both the proposal and cost schedule. The cover letter MUST contain the following statements and information:
- i. "This proposal may be released in total as public information in accordance with the requirements of the laws covering the same."
 - ii. "This proposal and cost schedule shall be valid and binding for SIXTY (60) days following the proposal due date."
 - iii. Name (and company name, if applicable), address, telephone and FAX numbers, and e-mail address of the individual or firm submitting the proposal.
 - iv. Name, title, address, telephone and FAX numbers, and e-mail address of the person or persons to contact who are authorized to represent the firm and to whom correspondence should be directed.
 - v. Proposer's Federal and State Taxpayer Identification Number.
 - vi. Statement as to whether the Proposer is a resident bidder in accordance with Oregon law.
- B. Statement of Understanding: A statement of interest as well as demonstrated understanding of scope of work and related tasks.
- i. Organization:
 - a. Describe your organization, including date founded and ownership.
 - b. Describe the experience of your company as it relates to services to local governments.
 - c. List examples of your firm's advisory services.
 - d. Describe the firm's research capability and resources.
 - ii. Personnel & Projects:
 - a. Provide the name(s) of key personnel who would be directly involved in providing services to the Port including resumes. Describe their relationship in the firm, the role they would play, their experience and years of service with the firm.
 - b. Identify the primary contact person responsible to the Port.
 - c. Provide a description of current relevant project experience.
 - iii. References: List at least three (3) references for whom similar work has been performed, including the name of the organization, name of contact person responsible for the service you performed, address and telephone number.
 - iv. Staff Reports: Describe the organization of the staff reports you would provide and enclose examples.
 - v. Proposed Approach: An outline for completing the proposed scope of work.
 - vi. Cost Schedule: Proposer's Cost Schedule shall be submitted at the same time and at the same location as the proposal, but in one (1) separate, sealed envelope clearly marked. The envelope shall bear, on the outside, the name and address of the Proposer. All costs are to be contained in this section. This section shall also include payment terms required for services rendered.

All questions regarding this solicitation should be directed to:

Port of Umpqua

Charmaine Vitek, Manager
PO Box 388
364 N 4th Street
Reedsport OR 97467
portofumpqua@portofumpqua.net
541-271-2232

Any costs incurred by the respondents in preparation of any information or material submitted in response to the RFQ shall be borne solely by the respondents.

4. Selection Process and Timeline

The Port Manager will evaluate each submitted proposal and report to the Board of Commissioners with a recommendation of the top three in prioritized order. The Board of Commissioners shall have access to all proposals and make the final selection and the Commission reserves the right to reject any proposal not in compliance with all prescribed public bidding procedures and requirements, and may reject for good cause any or all proposals upon finding that it is in the public interest to do so.

The Port will analyze information provided by all Proposers. The successful Proposer will be selected on the basis of the following:

1. Responsiveness to proposal specifications and required information
2. Understanding of project; familiarity with project and Port location
3. Recent experience with similar projects
4. Qualifications of project team
5. References
6. Ability to meet schedule
7. Fee for services performed
8. Reporting capabilities

The Port reserves the right to require other evidence of technical, managerial or other abilities prior to selection. The Port may decide to hold interviews with a short list of proposers or may go directly to selection. The tentative schedule for release of the proposal and selection process is as follows:

- Public release of proposal: August 19, 2010
- Proposal due date: at the Port office by 5:00 PM September 8, 2010
- Short list/Managers Recommendation: September 15, 2010
- Potential interviews: September 17, 2010 (*optional based upon Commission's decision on September 15)
- Bid Awarded and Contract Signed: September 24, 2010
- Work completed: August 31, 2011

*Bidders should tentatively schedule time for interviews on September 17, 2010.

5. Addenda to RFP

The Port may modify the RFP at any time prior to the RFP due date by issuance of an Addendum to all Proposers who are participating in the process at the time the Addendum is issued. Addenda will be numbered consecutively. Verbal modifications to the RFP specifications shall not be binding upon the Port.

6. Federal & State Taxpayer Identification

Proposals must state the Proposer's Federal and state Taxpayer Identification Numbers.

7. Resident Bidder

ORS 279.025(2)(h) requires each Proposer to indicate whether they are a "resident bidder." A resident bidder means a bidder who has paid unemployment taxes or income taxes in this state during the 12 months immediately preceding submission of the bid and has a business address in this state as defined in ORS 279.029.

8. Hold Harmless

The Proposer shall hold harmless, defend, and indemnify the Port and the Port's officers, agents and employees against any liability that may be imposed upon them by reason of the Proposer's failure to provide worker's compensation coverage or liability coverage.

9. Contract

The Port expects the successful Proposer to execute a personal services agreement with the Port. The Port would anticipate a contract initially for a period of one year. The successful Proposer agrees to enter into a contract with the Port within 14 days of being notified of the Commission's bid award.

The contract will define the extent of services to be rendered, method and amount of compensation. Any proposed changes in the language or requirements of the contract must be raised and resolved as part of the RFP process. All Proposers are advised to review and clearly document any proposed changes to the contract and include same with their proposal.

10. Appeals

Proposers who wish to appeal a disqualification or the award of the contract may submit the appeal in writing to the Manager at the Port Office within five (5) working days of the postmarked Notice of Award or disqualification. Disagreement with the process—e.g., scoring by evaluator(s)—is not subject to appeal. The appeal must describe the specific citation of law, rule, regulation or practice upon which the appeal is based.

11. Non-discrimination and Affirmative Action

The Port of Garibaldi is an equal opportunity employer and provider and requires all Proposers to comply with policies and regulations concerning equal opportunity.

The Proposer, in the performance of this Agreement, agrees not to discriminate in its employment because of an employee's or applicant's race, religion, national origin, ancestry, sex, age, or physical handicap.

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