



**Purchasing and Contract Services**

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**REQUEST FOR QUOTES (RFQ) #2014-04**

Issue Date: February 19, 2014

Project Name:	Information Technology Management & Functional/Organizational Evaluation		
BID Due Date/Time:	March 14, 2014, 1:00 PM		
Project Coordinator:	Mary Ann Zemke, Vice President for Finance and Administration		
Contract Coordinator:	George Marlton	Phone:	503-821-1277
		Email:	<a href="mailto:George.Marlton@oit.edu">George.Marlton@oit.edu</a>

**SUBMIT QUOTES VIA EMAIL TO [PURCHASING@OIT.EDU](mailto:PURCHASING@OIT.EDU) OR MAIL/HAND DELIVERY TO THE ABOVE WILSONVILLE ADDRESS TO GEORGE MARLTON**

**PLEASE NOTE: EMAIL SUBMISSIONS SHOULD HAVE “RFQ #2014-04” IN THE SUBJECT LINE**

**1. ANNOUNCEMENT AND SPECIAL INFORMATION**

Quoters are required to read and understand and comply with all information contained within this RFQ. All quotes are binding upon Quoter for thirty (30) days from the RFQ Due Date/Time. All payments for services will be paid in accordance to OAR 580-061-0050. Quotes received after the RFQ Due Date/Time may not be considered. Travel and other expense reimbursement will only be reimbursed in accordance with the OIT Contractor’s Travel Reimbursement Policy at the time the expense is incurred.

It will be the responsibility of potential Quoters to refer daily to the OUS Procurement Gateway website (<https://secure.ous.edu/bid/>) to check for any available addenda, response to clarifying questions, cancellations or other information pertaining to this Request for Quotes.

**2. BACKGROUND**

The Oregon Institute of Technology (“Oregon Tech”) is an institution founded on the principles of excellence through hands-on knowledge. We believe in giving students a rigorous, practical education while applying cutting-edge concepts for real-world solutions.

As the Pacific Northwest’s only public institute of technology, we take pride in our mission to deliver technology education. We continually partner with industry leaders to ensure that our programs and classes are at the top of the board with adapting to new technology and preparing students for workforce demands.

This real-world focus gives our students a competitive edge: 90 percent are employed or in graduate school within six months of graduation. Year after year, our baccalaureate graduates earn excellent starting salaries. We also attribute this to our dedicated professors, who provide personalized attention and are genuinely invested in their students’ learning. A total enrollment of more than 4,000 allows for an intimate campus environment distinguished by small classes and a student-to-faculty ratio of 20:1. This personal approach provides many benefits of a prestigious private education at a public price.

Our individualized and applied approach to teaching, which blends theory and practice, is the main reason our alumni are so avidly recruited. Whether they study software engineering, vascular technology, management, or dental hygiene, Oregon Tech students have amazing opportunities to apply what they learn in lab-based classes, clinics, externships and workplaces. This practical focus is reinforced in the classroom by instructors who come to Oregon Tech with relevant business, industrial, or clinical experience.

And in every program, major studies are underscored by a general-education core that broadens students' understanding of the world and teaches them to communicate effectively, solve problems and think for themselves. Oregon Tech is best known for its traditional engineering and technological core, but new degree options (and surprising twists on old ones) are remarkably multi-dimensional. A Geomatics student might use GIS technology to survey an archeological excavation, or a Mechanical Engineering student may complete a cross-disciplinary application in sustainability. A Communication Studies major might compile a technical manual for an Oregon Renewable Energy Center project. Information Technology and Health Informatics or Management students might specialize in allied health management.

#### Campus Locations

Oregon Tech has locations throughout the Pacific Northwest. In Oregon, this includes the traditional, residential campus in Klamath Falls, the urban campus in Wilsonville, as well as sites in La Grande and Salem. In Washington, Oregon Tech offers degrees to employees of The Boeing Company at sites in the Puget Sound area. Oregon Tech Online delivers a variety of programs with convenience and flexibility.

#### Information Technology Services Department (“ITS”)

ITS supports the university by either providing or consulting on many of the technological and communication needs of the university. The ITS department has about 16 FTE positions along with additional student workers. See ITS Staffing Levels at: <http://www.oit.edu/docs/default-source/information-technology-services-documents/2014-its-org-chart.pdf?sfvrsn=2>. The department has an annual budget of \$XXXX, which covers both salary, benefits, services and supplies. Additional funding is provided for project specific needs. The current Chief Information Officer (“CIO”) is retiring at the end of April 2014.

The CIO reports to the Vice President for Finance and Administration. Oregon Tech has a standing Information Technology Advisory Committee that is charged with providing vision and planning support for IT and recommends policy concerning quality control, resources and their allocation, hardware and software standards.

### **3. SCOPE**

The purpose of this RFQ is to select a consulting firm or organization to provide a Management & Functional/ Organizational Evaluation of the Oregon Tech Information Technology Services Department.

The evaluation will be performed in four stages: 1) Organizational Review (staffing levels, job descriptions, funding, continuity planning, and customer survey); 2) Technical Assessment (Technology review of infrastructure and capabilities); 3) Assistance with review of a new CIO job description; and 4) Peer Comparison (technology, staffing, funding, etc.).

Oregon Tech expects the selected firm to conduct on-campus interviews with key stakeholders and functional groups. On-campus interviews at the Wilsonville and Klamath Falls Campus. Ideally the selected firm would conduct the on-campus interviews during the week of April 14<sup>th</sup> or 21<sup>st</sup>.

Oregon Tech in its sole determination may request the selected firm to provide additional consulting services for the implementation of recommendations from the evaluation or additional consulting services for the new CIO.

#### **4. Quote**

Quotes should be short and concise with a maximum of 10 pages with the following information:

- A. Firm background, including experience with similar evaluations;
- B. Proposed work plan for conducting the evaluation, including timelines;
- C. Expectations or required information to be provided by Oregon Tech
- D. Fee on a time and material basis with a project maximum not-to-exceed. Should include all fees, travel (at Oregon Tech Contractor Reimbursement Policy) and any miscellaneous anticipated charges; and
- E. Three references from entities where similar evaluations have been performed.

#### **5. Evaluation**

Quotes will be evaluated based on subjective factors including, but not limited to: Company experience, staff experience, work plan, expectations, fees and references.

**OREGON INSTITUTE OF TECHNOLOGY  
CERTIFICATIONS  
RFQ #2014-04**

Each Quoter must read, complete and submit a copy of this Oregon Institute of Technology Certification with their Quote. Failure to do so may result in rejection of Quote. By signature on this Certification the undersigned certifies that they are authorized to act on behalf of the Quoter and that under penalty of perjury the undersigned will comply with the following:

**SECTION I. OREGON TAX LAWS**

As required in ORS 305.385(6) the undersigned hereby certifies that to the best of the undersigned's knowledge, the Entity is not in violation of any Oregon Tax Laws. For purposes of this certification, "Oregon Tax Laws" means a state tax imposed by ORS 401.792 to 401.816 and ORS chapters 118, 314, 316, 317, 318, 320, 321 and 323; the elderly rental assistance program under ORS 310.630 to 310.706; and local taxes administered by the Department of Revenue under ORS 305.620. If a Contract is executed, this information will be reported to the Internal Revenue Service. Information not matching IRS records could subject Contractor to 31% backup withholding.

**SECTION II. AFFIRMATIVE ACTION**

The undersigned hereby certifies that they have not discriminated against Minority, Women or Emerging Small Business Enterprises in obtaining any required subcontracts, pursuant to OAR 580-061-0030(3).

**SECTION III. COMPLIANCE WITH SOLICITATION**

The undersigned further agrees and certifies that they:

1. Have read, understand and agree to be bound by and comply with all requirements, instructions, specifications, terms and conditions of the RFQ (including any attachments); and
2. Are an authorized representative of the Quoter, that the information provided is true and accurate, and that providing incorrect or incomplete information may be cause for rejection of the Quote or contract termination; and
3. Will furnish the designated item(s) and/or service(s) in accordance with the RFQ and Quote.

Firm Name: \_\_\_\_\_ Date: \_\_\_\_\_  
Signature: \_\_\_\_\_ Title: \_\_\_\_\_  
Name (Type or Print): \_\_\_\_\_ Telephone: \_\_\_\_\_  
Email: \_\_\_\_\_ OR CCB # (if applicable): \_\_\_\_\_

Business Designation (check one):

Corporation  Partnership  Sole Proprietorship  Non-Profit  Limited Liability Company

Oregon Certified Minority, Women, or Emerging Small Business: (Mark if applicable and certification #)

Minority: \_\_\_\_\_  Women: \_\_\_\_\_  ESB: \_\_\_\_\_

Self-Reported Minority, Women, or Emerging Small Business: (Mark if applicable)

Minority: \_\_\_\_\_  Women: \_\_\_\_\_  ESB: \_\_\_\_\_

## OREGON INSTITUTE OF TECHNOLOGY INSTRUCTIONS TO QUOTERS

Quotes are subject to the applicable provisions and requirements of the Oregon Administrative Rules and Oregon Revised Statutes.

### QUOTE PREPARATION

1. **QUOTE FORMAT:** Quotes must be submitted as indicated in the RFQ. Quotes may be submitted in writing to OIT office via e-mail, mail or in person.
2. **CONFORMANCE TO RFQ REQUIREMENTS:** Quotes must conform to the requirements of the RFQ. Unless otherwise specified, all items quoted are to be new, unused and not remanufactured in any way. Any requested attachments must be submitted with the quote and in the required format. Quote prices must be for the unit indicated on the quote. Failure to comply with all requirements may result in quote rejection.
3. **ADDENDA:** Only documents issued as addenda by OIT serve to change the RFQ in any way. No other directions received by the Quoter, written or verbal, serve to change the RFQ document. **NOTE: IF YOU HAVE RECEIVED A COPY OF THE RFQ, YOU SHOULD CONSULT THE UNIVERSITY PROCUREMENT GATEWAY WEBSITE (<https://secure.ous.edu/bid/>) TO ENSURE THAT YOU HAVE NOT MISSED ANY ADDENDA OR ANNOUNCEMENTS. QUOTERS ARE NOT REQUIRED TO RETURN ADDENDUMS WITH THEIR QUOTE. HOWEVER, QUOTERS ARE RESPONSIBLE TO MAKE THEMSELVES AWARE OF, OBTAIN AND INCORPORATE ANY CHANGES MADE IN ANY ADDENDUMS ISSUED, AND TO INCORPORATE ANY CHANGES MADE BY ADDENDUM INTO THEIR FINAL QUOTE. FAILURE TO DO SO MAY, IN EFFECT, MAKE THE QUOTER'S QUOTE NON-RESPONSIVE, WHICH MAY CAUSE THE QUOTE TO BE REJECTED.**
4. **USE of BRAND or TRADE NAMES:** Any brand or trade names used by OIT in RFQ specifications are for the purpose of describing and establishing the standard of quality, performance and characteristics desired and are not intended to limit or restrict competition. Quoters may submit quotes for substantially equivalent products to those designated unless the RFQ provides that a specific brand is necessary because of compatibility requirements, etc. All such brand substitutions shall be subject to approval by OIT.
5. **PRODUCT IDENTIFICATION:** Quoters must clearly identify all products quoted. Brand name and model or number must be shown. OIT reserves the right to reject any quote when the product information submitted with the quote is incomplete.
6. **FOB DESTINATION:** Unless specifically allowed in the RFQ, ***QUOTE PRICE MUST BE F.O.B. DESTINATION with all transportation and handling charges paid by the Quoter.***
7. **DELIVERY:** Delivery time must be shown in number of calendar days after receipt of purchase order.
8. **EXCEPTIONS:** Any deviation from quote specifications, or the Oregon Institute of Technology Professional Services Contract may result in quote rejection.
9. **SIGNATURE ON QUOTE:** Quotes must be signed by an authorized representative of the Quoter. Signature on a quote certifies that the quote is made without connection with any person, firm or corporation making a quote for the same goods and/or services and is in all respects fair and without collusion or fraud. Signature on a quote also certifies that the Quoter has read and fully understands all quote specifications, and the Oregon Institute of Technology Professional Services Contract (including insurance requirements). No consideration will be given to any claim resulting from quoting without comprehending all requirements of the RFQ.
10. **QUOTE MODIFICATION:** Quotes, once submitted, may be modified in writing before the time and date set for quote closing. Any modifications should be signed by an authorized representative, and state that the new document supersedes or modifies the prior quote. Quoters may not modify quotes after quote closing time.
11. **QUOTE WITHDRAWALS:** Quotes may be withdrawn by request in writing signed by an authorized representative and received by OIT prior to quote closing time. Quotes may also be withdrawn in person before quote closing time upon presentation of appropriate identification.

- 12. QUOTE SUBMISSION:** Quotes may be submitted by returning to OIT Purchasing and Contract Services Office in the location designated in the introduction of the RFQ via e-mail, mail or in person but no oral or telephone quotes will be accepted. Envelopes, or e-mails containing Quotes should contain the RFQ Number and RFQ Title.

#### **QUOTE EVALUATION AND AWARD**

- 1. PRIOR ACCEPTANCE OF DEFECTIVE PROPOSALS:** Due to limited resources, OIT generally will not completely review or analyze quotes which fail to comply with the requirements of the RFQ or which clearly are not the best quotes, nor will OIT generally investigate the references or qualifications of those who submit such quotes. Therefore, neither the return of a quote, nor acknowledgment that the selection is complete shall operate as a representation by OIT that an unsuccessful quote was complete, sufficient, or lawful in any respect.
- 2. DELIVERY:** Significant delays in delivery may be considered in determining award if early delivery is required.
- 3. CASH DISCOUNTS:** Cash discounts will not be considered for award purposes unless stated in the RFQ.
- 4. PAYMENT:** Quotes which require payment in less than 30 days after receipt of invoice or delivery of goods, whichever is later, may be rejected.
- 5. INVESTIGATION OF REFERENCES:** OIT reserves the right to investigate references and or the past performance of any Quoter with respect to its successful performance of similar services, compliance with specifications and contractual obligations, and its lawful payment of suppliers, sub-contractors, and workers. OIT may postpone the award or execution of the contract after the announcement of the apparent successful Quoter in order to complete its investigation. OIT reserves the right to reject any quote or to reject all quotes at any time prior to OIT's execution of a contract if it is determined to be in the best interest of OIT to do so.
- 6. METHOD OF AWARD:** OIT reserves the right to make the award by item, groups of items or entire quote, whichever is in the best interest of OIT.
- 7. QUOTE REJECTION:** OIT reserves the right to reject any and all quotes.
- 8. QUOTE RESULTS:** Quoters who submit a quote will be notified of the RFQ results. Awarded quote files are public records and available for review by appointment.