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REQUEST FOR QUOTES (RFQ) #2014-29 Revision 1

Issue Date: August 29, 2014

Project Name:	Bill Tracking and Testimony Coordination		
Quote Due Date/Time:	September 12, 2014, 1:00 PM		
Project Coordinator:	Lita Colligan	Phone:	503-821-1247
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Contract Coordinator:	George Marlton	Phone:	503-821-1277
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SUBMIT QUOTES VIA EMAIL TO PURCHASING@OIT.EDU OR MAIL/HAND DELIVERY TO THE ABOVE WILSONVILLE ADDRESS TO GEORGE MARLTON

PLEASE NOTE: EMAIL SUBMISSIONS SHOULD HAVE “2014-29” 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.

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. SCOPE

The purpose of this RFQ is to retain the services of a professional firm to perform Oregon legislative bill tracking and to provide testimony coordination during the 2015 legislative session for the Oregon Public Universities, which include: Eastern Oregon University, Oregon Institute of Technology, Oregon State University, Portland State University, Southern Oregon University, University of Oregon, and Western Oregon University.

Although the resulting contract for this RFQ will be with Oregon Tech, the Oregon Tech representative will coordinate services with the Legislative Advisory Council (LAC), which has representatives from all seven universities. The initial contract will be for the period of September 2014 through August 2015, with the option for additional extensions thereafter.

The project has a maximum budget of \$70,000. By providing the maximum budget amount, it is not intended that firms propose at that fixed amount but instead to provide a professional and competitive proposal.

Services: The selected firm will perform the following coordinating/collaboration functions for the 2015 legislative session. These functions will be directly aimed at identifying, tracking, and issuing daily reports regarding legislation of interest to the universities. We are seeking the assistance of a bill tracker and coordinator, and *not* a lobbyist.

Legislative Advisory Council Meetings/Internal Communications

- Schedule and facilitate LAC meetings, distribute notes to LAC (September 2014- August 2015);
- Maintain a list of upcoming possible agenda items;
- Work with LAC members and other university representatives as needed to develop coalition partners and messages for internal and external stakeholders on specific bills and in overall support for investments in higher education (September to August);
- Coordinate an end-of-session “Thank You” event for coalition partners and key legislators; and
- Provide an end-of-session summary evaluation of the universities’ coordinated efforts with recommendations for improvements

Bill/Policy Issues

- Identifying, evaluating, and recommending bills to the LAC to track (3000+ Bills from January to February and some 200-300 issues tracked throughout the session);
- Daily updating and maintaining the bill tracking database (January to July);
- Issuing Daily Bill Tracker Reports to the LAC with a summary of key issues to watch (January to July);
- Maintaining the list of bills that involve shared interests among the seven universities in support, opposition, or concern (January to July);
- Coordinating among the seven universities which institutions will lead university engagement and where and how that engagement will be aimed for each bill identified (January to July);
- Ensuring that lead universities and supporting institutions are able to respond to committees, key legislators, the governor’s office, and other lobbyists on shared issues in a timely manner (January to July);
- Writing end-of-week summaries that both summarize committee meetings and policy issues that arose that week, and project the hearings and issues likely to arise in the week to follow. This information will be provided to other university councils. (February to July); and
- Preparing an end-of-session policy summary report that addresses all of the post-secondary education policy and budget bills (due one month following *sine die*).

Budget Issues

- Coordinating the University Presidents’ response to the Governor’s Recommended Budget in December 2014;
- Coordinating the University Presidents’ response to the co-chairs’ budget anticipated in late February/early March;
- Coordinating budget testimony, including speakers and materials for the University Operating and Capital Budget presentations before the relevant Ways & Means Subcommittees during the session;
- Coordinating budget testimony including materials for any Ways and Means Roadshow hearings anticipated during the legislative session;
- Coordinating speakers, testimony and materials for the Capital Construction hearings for university capital construction anticipated in April or May;
- Preparing an End of Session Budget report in collaboration with the Finance VPs after the end of session; and
- Coordinating a shared response to the legislatively approved budget in summer 2015.

3. Quote

Quotes should be concise with the following information:

- A. Company experience, anticipated assigned staff and their experience in this type of project;
- B. Name and experience of the principal who will be conducting the work;
- C. Proposed methodology and plan for performing the work and engaging with the LAC throughout the contract term;

- D. Information technology systems for tracking and communicating on bills;
- E. Provide a fixed monthly fee retainer, which will be inclusive of all fees, travel and other expenses;
- F. References; and
- G. Any additional information that Oregon Tech should take into consideration for the project or qualifications.

4. Evaluation

Quotes will be evaluated based on subjective factors including, but not limited to: Company experience, staff experience, methodology and plan, information technology systems, proposed fees, and references.

**OREGON INSTITUTE OF TECHNOLOGY
CERTIFICATIONS
RFQ #2014-29**

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 Oregon Tech 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 Oregon Tech 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 Oregon Tech 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 Oregon Tech.
5. **PRODUCT IDENTIFICATION:** Quoters must clearly identify all products quoted. Brand name and model or number must be shown. Oregon Tech 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 Oregon Tech 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 Oregon Tech 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, Oregon Tech 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 Oregon Tech 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 Oregon Tech 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:** Oregon Tech 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. Oregon Tech may postpone the award or execution of the contract after the announcement of the apparent successful Quoter in order to complete its investigation. Oregon Tech reserves the right to reject any quote or to reject all quotes at any time prior to Oregon Tech's execution of a contract if it is determined to be in the best interest of Oregon Tech to do so.
- 6. METHOD OF AWARD:** Oregon Tech reserves the right to make the award by item, groups of items or entire quote, whichever is in the best interest of Oregon Tech.
- 7. QUOTE REJECTION:** Oregon Tech 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.