

**REQUEST FOR PROPOSALS
2022 Strategic Business Plan Update****Proposal Due Date: 4:00pm, November 30, 2022**

1. Background and Services Required

The Port of The Dalles (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, or combination of firms, to assist the Port in preparing a Strategic Business Plan.

A minimum of seven (7) bound copies, an electronic copy (file format: Word docx), and an electronic copy (file format: Adobe PDF) shall be provided to the Port upon completion of the plan(s).

2. Scope of Work

Please review the Scope of Work attached separately.

3. Proposal Form and Content

Proposals should be prepared simply and economically, providing straightforward, concise descriptions of the Proposer's abilities to satisfy the requirements of the Port's RFP and Scope of Work. 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 15 pages of material including the cover letter and resumés but excluding example staff report, personal services contract and cost schedule. Submittals in excess of 15 pages shall be considered non-responsive.

Hard copy or electronic versions of the proposal may be submitted. If hard copies are submitted, please include 2 bound and one unbound hard copy. Electronic submissions should be emailed to admin@portofthedalles.com with "2022 SBP Response" as the subject line.

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:
 - a. "This proposal may be released in total as public information in accordance with the requirements of the laws covering the same."
 - b. "This proposal and cost schedule shall be valid and binding for SIXTY (60) days following the proposal due date."
 - c. Name (and company name, if applicable), address, telephone number, and e-mail address of the individual or firm submitting the proposal.
 - d. Name, title, address, telephone, 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.
 - e. Proposer's Federal and State Taxpayer Identification Number.
 - f. 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.
 - a. Organization:
 - i) Describe your organization, including date founded and ownership.

- ii) Describe the experience of your company as it relates to services to local governments.
 - iii) List examples of your firm's advisory services.
 - iv) Describe the firm's research capability and resources.
- b. Personnel & Projects:
- i) Provide the name(s) of key personnel who would be directly involved in providing services to the Port including resumés. Describe their relationship in the firm, the role they would play, their experience and years of service with the firm.
 - ii) Identify the primary contact person responsible to the Port.
 - iii) Provide a description of current relevant project experience.
- c. References: List at least three (3) references for whom similar work has been performed, including the name of the organization, date work was performed, name of contact person responsible for the service you performed, address and telephone number.
- d. Progress Reports: Describe the progress reports you would provide and enclose examples. These will be provided to the Port by the last day of each month.
- e. Proposed Approach: An outline for completing the proposed scope of work.
- f. 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 The Dalles
Andrea Klaas, Executive Director
3636 Klindt Drive
The Dalles, OR 97058
p: 541-298-4148
e: andrea@portofthedalles.com

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

4. Selection Process and Timeline

The Executive Director 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. 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 based on the following criteria:

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

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:

1. Public release of proposal: On or before October 19, 2022
2. Proposal due date: November 30, 2022
3. Top proposals selected: December 9, 2022
4. Interviews: to be scheduled if needed December 12-13, 2022
5. Intent to Award: December 14, 2022
6. Status Presentation to Port Commission: March 8, 2023
7. Work completed no later than: June 30, 2023
8. Presentation to Port Commission no later than: July 12, 2023

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. 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 or the bid and has a business address in this state as defined in ORS 279.029.

7. 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.

8. Contract

The Port expects the successful Proposer to execute a personal services agreement with the Port. The Port would anticipate a contract for a period not to exceed six months. 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.

9. Appeals

Proposers who wish to appeal a disqualification or the award of the contract may submit the appeal in writing to the Executive Director 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.

10. Non-discrimination and Affirmative Action

The Port of The Dalles 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 work 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.

11. Statement of Funding

This project was funded in part with Oregon Lottery Funds administered by Oregon Business Development Department.