

REQUEST FOR PROPOSALS
FOR A
COUNTY STRATEGIC PLAN
CURRY COUNTY

PROPOSAL DUE DATE AND TIME

May 1, 2019, 4:00 pm PST

ELECTRONIC SUBMITTAL ADDRESS

schmelzerj@co.curry.or.us

FAXED PROPOSALS WILL NOT BE ACCEPTED

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1 INTRODUCTION AND BACKGROUND

1.1 Introduction

Curry County is requesting proposals for a consultant to work with the County Board of Commissioners, elected Officials and Department Managers to develop a Strategic Plan for 2019 and ten (10) years beyond. Curry County desires a long term relationship with a consulting firm that can assist with *potential* on-going planning needs. The winning bid will be based on experience, quality, creativity and cost.

Curry County will award a contract to the individual or firm which best meets the needs of the County. Curry County reserves the right to cancel this procurement or reject any and all proposals received in accordance with ORS 279B.100, or to negotiate separately with any source whatsoever in any manner necessary to serve the best interest of the County. Interested individuals or firms must meet the submittal requirements identified in this RFP.

1.2 Background

Curry County has approximately 125 employees in 18 departments that provide services to the people of a community of 22,000 Oregon residents. The County has not discussed nor agreed upon a strategic direction. We are attempting to establish a unified vision for the County along with accompanying goals and action items, in the form of a Strategic Plan, which can direct budget allocations, work plans, programs and services.

2 GENERAL

2.1 Schedule of Events

Event	Deadline
Request for proposals issued	March 27, 2019
Deadline for Proposer's written questions and requests	April 15, 2019
Deadline for proposals	May 1, 2019
Notification of finalists	May 15, 2019
Demonstrations scheduled, if deemed necessary	May 24, 2019
Notice of intent to award issued	May 29, 2019
Contract signed	June 5, 2019

The Schedule of Events is subject to change. The County will notify all respondents if there are any changes to the schedule.

2.2 Proposal Deadline

Both hard copy and electronic proposals are acceptable. Electronic proposals may be sent in an e-mail to schmelzerj@co.curry.or.us. Hard copies may be mailed to the Administrative Contact in Sec. 2.3. All proposals received after the date and time indicated above will not be opened or considered. Hard copies received after the deadline will be returned unopened.

2.3 Administrative Contact

Name: Julie Schmelzer
Title: County Director of Operations
Telephone: (541) 247-3287
E-Mail: schmelzerj@co.curry.or.us

2.4 Right to Retain

Curry County reserves the right to retain all proposals submitted and to use any ideas in a proposal regardless of whether that proposal is selected. Submission of a proposal indicates acceptance by the Proposer of the conditions contained in this RFP, unless clearly and specifically noted in the proposal submitted and confirmed in the contract between Curry County and the Proposer selected.

2.5 Cost of Preparing Proposal

Curry County will not pay any costs incurred by any Proposer in the submission or presentation of a proposal, or in making the necessary studies for the preparation thereof.

3 SCOPE OF WORK

3.1 Scope of Work

3.1.1 Review the current Curry County website for information about Governance, Departments, Programs, Services, Budget, etc. and conduct phone calls and interviews as deemed necessary by the Proposer to prepare for the Planning Retreat.

3.1.2 Within one (1) month of contract award, facilitate a two (2) day retreat with the County Commissioners, elected Officials and Department Managers for Team Building and the development of a Strategic Plan, including goals for 2019, 2024, and 2029.

3.1.3 Create and deliver a Strategic Plan complete with:

- a. A vision statement;
- b. A mission statement;
- c. Values/guiding principles;

- d. Goals and objectives;
- e. Strategies to implement the objectives;
- f. Timeline for implementation;
- g. Success indicators to measure progress

3.1.4 The contractor shall provide a minimum of three (3) drafts of revisions to the Draft Strategic Plan incorporating Curry County feedback.

3.1.5 Conduct one (1) public workshop to present the Draft Strategic Plan and obtain public input, followed by one (1) work session with County Commissioners to discuss the input, and incorporate changes.

3.1.6 Provide six (6) hard copies of the Final Draft Strategic Plan for adoption by the Board of Commissioners, incorporate any final changes made at adoption, and submit an electronic Word version of the adopted Curry County Strategic Plan, as well as a PDF, and all associated files (surveys, retreat session notes, etc.).

3.1.7 Proposer shall be responsible for meeting all deadlines agreed upon in the contract. Be advised it is Curry County's intent to allocate no more than six (6) months for the retreat, public workshop, work session and all deliverables

4 REQUIRED SUBMITTALS

4.1 Quantity of Proposals

Submit one (1) proposal to the Administrative Contact. Proposals should contain the submittals listed in this section and any other information not requested that illustrates qualifications and content from the Proposer.

4.2 Required Submittals

It is the Proposer's sole responsibility to submit information in fulfillment of the requirements of the RFP. If submittals are not substantially compliant in all material respects with the criteria outlined in the RFP, it will cause the Proposal to be deemed non-responsive. If any part of a proposal is proprietary and is claimed exempt from disclosure, the Proposer must separately submit that material along with the Proposal and have it clearly marked as "Proprietary Information; Confidentiality Requested."

4.2.1 Cover Letter

A cover letter should not be more than two (2) pages long and should include as a minimum the following:

- a) A statement of the Proposer’s understanding of the objective of the services to be performed;
- b) A statement of the Proposer’s experience and ability to meet the Scope of Work;
- c) A positive commitment to perform the services within the time period specified; and
- d) The names of persons authorized to represent the Proposer, their title, mailing address, e-mail address, and telephone number (if different from the individual who signs the transmittal letter).

4.2.2 General Information

- a) Name of Proposer (individual or firm);
- b) Address;
- c) Federal Employer Identification Number;
- d) Length of time in business;
- e) Whether Proposer is local, regional or national;
- f) Location of the office from which the work is to be done (hereafter referred to as the “local office”);
- g) If the Proposer is a firm, description of the organization, size, structure and office location(s). Identification of principal supervisory and managerial staff assigned;
- h) Indicate, if appropriate, Opportunity/Affirmative Action Policy, if the firm has one;
- i) Description of Proposer’s experience;
- j) The Proposer shall provide links to three (3) strategic plans their firm has successfully seen through to adoption;
- k) The Proposer shall include a statement describing the roles and responsibilities of the Proposer in the drafting of the plans provided in response 4.2.2. j) above;
- l) Resumes of consultants likely to be assigned to the representation. The description should include: Professional and educational background of each consultant, position in firm, years and types of experience, overall supervision to be exercised, and prior experience of the individual consultants with respect to the required experience listed above;
- m) Identification of any complaints to liability carriers, legal action, including lawsuits, administrative complaints, etc., in the past 5 years;
- n) Projected date in which the Final Draft Strategic Plan will be ready for review;
- o) Any other information that would help in the evaluation of the Proposer for this contract.

4.2.3 Customer Support

Curry County operates on Pacific Standard Time (PST) and has primary hours of operation Monday through Friday from 8 a.m. to 5 p.m., with some programs having extended hours of operation. Curry County business offices are closed on weekends and U.S. holidays. Please identify how Proposer will provide customer support during the planning process.

4.2.4 Project cost

Provide a cost breakdown for the project. Include any expenses expected to be contributed by Curry County.

4.2.5 References

Provide a minimum of three (3) government references (preferably local government agencies).

5 SUBMISSION

Electronic Proposal Submittals

Electronic proposals shall be in PDF format included as attachment(s) in an e-mail sent to schmelzerj@co.curry.or.us. The e-mail subject line should contain the phrase “Strategic Plan Proposal – (Proposer’s Company Name).” Only those proposals received at this e-mail address by the due date and time will be considered; proposals sent to other e-mail addresses will not be considered. It is highly recommended that the Proposer confirms receipt of the e-mail with the Administrative Contact noted above or by calling (541) 247-3287.

Hard Copy Submittals

Hard copy proposals shall be single sided and unbound. The outside of the mailing envelope shall read “Strategic Plan Proposal – (Proposer’s Company Name)”. The copy must be mailed to the Administrative Contact identified in Sec. 2.3. It is highly recommended that the Proposer confirms receipt of the e-mail with the Administrative Contact noted above or by calling (541) 247-3287.

6 EVALUATION

The status of review and evaluation are as follows:

6.1 Selection and Evaluation Process

Curry County will review proposals and may follow up with interview questions. A final group of Proposers may be asked to demonstrate their product. After the final demonstrations the Curry County Board of County Commissioners may award the contract. Proposals will be reviewed in accordance with the following criteria:

- 6.1.1 Proposed approach to scope of work and level of support services.
- 6.1.2 Level of experience of the individuals identified to work on this project.
- 6.1.3 The Proposer's experience in delivering a successful product and support service to similar clients and projects. The selected contractor is required to meet the highest standards prevalent in the industry or business most closely involved in providing the appropriate goods or services.
- 6.1.4 Customer service support (e.g. service hours that align with Curry County business hours, services available, etc.).
- 6.1.5 Response from references.
- 6.1.6 Cost.

Follow up interviews and demonstration evaluation may focus on the following:

- 6.1.7 Presenter's understanding of the scope of Curry County's needs;
- 6.1.8 Presenter's ability to deliver on Curry County's Scope of Work based on experience and staffing expertise;
- 6.1.9 Presenter's ability to provide services beyond the Scope of Work identified in the RFP;
- 6.1.10 Presenter's ability to provide a completed Final Draft Strategic Plan within the timeframe identified in this proposal;
- 6.1.11 References from other governmental agencies

6.2 Proposal Validity Period

Each proposal shall be irrevocable for a period of at least ninety (90) days from the proposal opening date.

6.3 Competency of Proposals

To enable Curry County to evaluate the responsibility and financial stability of a Proposer, the qualifying and accepted Proposer shall, upon request, furnish such information as reasonably necessary.

6.4 Reservation in Evaluation

Curry County reserves the right to:

- 6.4.1 Request “Best and Final Offers” from the two highest scoring Proposers and award to the lowest priced;
- 6.4.2 Re-assess the proposals and award to the Proposer determined to best meet the overall needs of Curry County;
- 6.4.3 Commence serial negotiations with the highest ranked Proposer or commence simultaneous negotiations with all responsive Proposers within the competitive range; and negotiate with a Proposer over:
 - The Scope of Work;
 - The contract price as it is affected by negotiating the Scope of Work; and
 - Any other terms and conditions as determined by Curry County.

6.5 Investigation of References

Curry County reserves the right to investigate and to consider the references and past performance of any Proposer with respect to such things as its performance or provision of similar goods or services, compliance with specifications and contractual obligations, and its lawful payment of suppliers, subcontractors and workers. Curry County may postpone the award or execution of the contract after the announcement of the notice of intent to award in order to complete its investigation.

6.6 Preferences

Notwithstanding provisions of law requiring the County to award a contract to the lowest responsible bidder or best Proposer or provider, when procuring goods and services for any public use, the County shall apply the applicable preferences described in ORS 279A.120 (Preference for Oregon goods and services) and ORS 279A.125 (Preference for recycled materials).

6.7 Contract Award

The contract will be awarded to the responsible Proposer whose Proposal Curry County determines in writing is the most advantageous to Curry County. If a successful contract cannot be completed after award, Curry County may conclude contract negotiations, rescind its award to that Proposer, and return to the most recent RFP evaluation stage to negotiate with other Proposer(s) for award. The contract will include items similar to those shown in the attached.

6.8 Proposal Rejections

Curry County reserves the right to:

- 6.8.1 Reject any proposals not in compliance with all public procedures and requirements;
- 6.8.2 Reject any proposal(s) not meeting the specifications set forth herein;
- 6.8.3 Waive any and all irregularities in proposals submitted;
- 6.8.4 Consider the competency of Proposers in making any award;
- 6.8.5 Reject all proposals;
- 6.8.6 Award any and all parts of any proposals; and
- 6.8.7 Request additional references

7 APPLICABLE STATUTES AND RULES

This RFP is subject to the applicable provisions and requirements of the Oregon Revised Statutes, Oregon Administrative Rules, and the Curry County Contracting Rules.

7.1 Communications During RFP Process

In order to ensure a fair and competitive environment, direct communication between Curry County staff other than the Administrative Contact and any party in a position to create an unfair advantage to Proposer or disadvantage to other Proposers with respect to the RFP process or the award of a contract is strictly prohibited.

7.2 Questions and Requests

Any Proposer requiring further clarification of the proposal procedures contained herein should submit specific questions in writing to:

Name: Julie Schmelzer
Title: County Director of Operations
E-Mail: schmelzerj@co.curry.or.us

The e-mail subject line should contain the phrase “Strategic Plan – Proposer’s Company Name.” A written response will be provided to those questions that are deemed appropriate. The response will be in the form of an addendum and will be sent to all individuals or firms in receipt of this RFP.

7.3 Addenda

Only documents issued as written addenda by Curry County serve to change the RFP in any way. No other direction received by the Proposer, written or verbal, serves to change the RFP.

Addenda will be posted and made available at all electronic and physical locations where this Solicitation Document may be reviewed.

Att. Sample contract information

CONTRACT BETWEEN CURRY COUNTY AND

[NAME]

This contract is made and entered into this _____ day of _____, 2019 by and between Curry County, a General Law County, Political Subdivision of the State of Oregon (County) and _____ (Contractor).

1. Work to Be Performed

Contractor, shall, except as otherwise provided, at its own expense, furnish all materials, labor and equipment, necessary to complete the project regarding the services (select as appropriate):

Strategic Planning Services outlined in RFP and Bid

Contractor shall perform work to meet the highest standards prevalent in the industry or business most closely involved in providing the appropriate goods or services.

2. Completion Date

All work contracted herein shall be completed within _____ days of execution of this contract. Contractor shall begin work on the project immediately upon execution of this agreement.

3. Prevailing Wages and Procurement

Contractor shall comply with all prevailing wage laws, as applicable.

4. Independent Contractor

Contractor is engaged as an independent contractor, and will be deemed so for purposes of the following:

A. Contractor will be solely responsible for payment of any federal or state taxes required as a result of this contract.

B. This contract is not intended to entitle Contractor to any benefits generally granted to County's employees, such as vacation, sick leave, health insurance, Social Security, etc.

5. Incorporation of Statutory Provisions Required for Public Contracts

The Contractor certifies that it will comply with all applicable public contract laws, including, but not limited to, ORS 279B.220 and 279B.230 that are incorporated by reference into this agreement.

6. Workers' Compensation

Contractor, its subcontractors, if any, working under this contract are subject workers under Oregon Workers' Compensation law and shall comply with ORS 656.017, which requires it to provide workers' compensation coverage for all of its subject workers.

7. Indemnification

Contractor shall indemnify, defend and save and hold harmless County from any and all suits, actions, legal or administrative proceedings, demands, claims, liabilities, fines, penalties losses, injuries, damages, expenses or costs, including interest and attorney fees, in any way connected with any injury to any person or damage to any property occasioned in any way by Contractor's or Contractor's subcontractor's prosecution of work under this contract.

8. Insurance

Contractor shall provide the following insurance in connection with the project:

INSURANCE DESCRIPTION	MINIMUM REQUIRED COVERAGE
A. Workers' Compensation	Statutory
B. General Liability	\$2,000,000
C. Automobile Liability	\$1,000,000

Evidence of such insurance shall be provided to County within ten days of the execution of this agreement and before work begins. The liability insurance shall name County and its officers, agents and employees as additional insured.

9. Nonwaiver

No waiver of any breach of this agreement shall be held to be a waiver of any other or subsequent breach.

10. Severability

Should any clause or section of this contract be declared by a court to be void or voidable, the remainder of the contract shall remain in full force and effect.

11. Termination for Convenience

County shall have the right to terminate this contract in its entirety at its convenience. If County terminates pursuant to this section, County shall retain any other right or remedy which County has against Contractor. Termination shall not prejudice the rights of the County that accrued before termination. If the County invokes this provision, it may notify Contractor by any commercially reasonable means. Contractor shall be entitled to payment for work done up to the date of termination.

12. Attorney Fees and Costs

In the event that either party to this contract shall take any action, judicial or otherwise, to enforce or interpret any of the terms of this contract, each party shall be wholly responsible for its own expenses which it may incur in taking such action, including costs and attorney fees, whether incurred in a suit or action or appeal from a judgment or decree therein or in connection with any non-judicial action.

13. Applicable Laws

This contract is executed in the State of Oregon and is subject to Oregon law and the jurisdiction of Curry County.

14. Written Changes Required

The rights and duties under this contract shall not be modified, delegated, transferred, or assigned, except upon written signed consent of both parties.

15. Certification of Reading and Understanding of Documents

The Contractor certifies that it has read and fully understands all contract documents including this contract, the solicitation document and all terms and conditions. The Contractor understands

and acknowledges that in signing this contract Contractor waives all right to plead any misunderstandings regarding the same.

CONTRACTOR

_____/_____/_____
By (signature) Date

Printed Name Federal I.D. No.

Street

City State Zip Code

E-Mail Address

CURRY COUNTY

_____/_____/_____
Julie A. Schmelzer, Director of Operations Date

Approved as to Form:

_____/_____/_____
John R. Huttel, Curry County Legal Counsel Date