



**City of Tigard**

FINANCE AND INFORMATION SERVICES

# Informal Request for Proposal (IRFP)

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## 2015 COMMUNITY SURVEY

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**Statements Due:** Tuesday, October 20, 2015 - 2:00 pm local time

**Submit Proposals To:** City of Tigard – Contracts & Purchasing Office  
Attn: Joe Barrett, Sr. Management Analyst  
13125 SW Hall Blvd.  
Tigard, Oregon 97223

**Direct Questions To:** Liz Newton, Assistant City Manager  
Phone: (503) 718-2412  
Email: [liz@tigard-or.gov](mailto:liz@tigard-or.gov)

## INFORMAL REQUEST FOR PROPOSALS

The City of Tigard is soliciting informal proposals from consulting firms qualified to provide a community survey for the City. Work under this project includes, but is not limited to: questionnaire and web survey design, focus group design and execution, data collection, data tabulation, and reporting and presentation.

The City is interested in conducting a statistically valid survey using a random sample and focus groups to collect objective data on citizen satisfaction about the level and quality, priority and funding of City services, preferences on citizen engagement and feedback on the strategic vision for the City.

Every two years, the City administers a community attitudes survey. The 2013 survey added focus groups to an online survey and the usual cell and landline telephone survey of 400 residents. The sample was normalized to resemble the City of Tigard's demographics. Results of previous surveys are available upon request.

In 2014, the City Council formalized the Tigard's commitment to walkability, health and the interconnectedness of Tigard's residents by unanimously adopting the Strategic Plan with a strong vision and roadmap for the future:

### **Vision**

*"The most walkable community in the Pacific Northwest where people of all ages and abilities enjoy healthy and interconnected lives."*

### **Goal**

*The strategic plan will provide guidance and direction for the city's priorities over the next 20 years. Proactive planning for the future will provide an opportunity to grow the city in a way that is thoughtful and unique by leveraging and building on Tigard's existing strengths.*

Tigard is located at the junction of Interstate 5, Highway 99W and Highway 217 - just minutes southwest of Portland in Washington County. It is the state's 11th largest city with a population of 50,444.

With a diverse economy, strong schools and outstanding parks and recreation access, Tigard is one of the most livable cities in Oregon. Since it incorporated in 1961, the city has grown to become a desirable and affordable community in the Portland area. Tigard boasts more than 50,000 residents and 3,000 businesses. Residents have access to 12 miles of trails spread throughout the city and 510 acres of parks and open spaces, used by everyone from sports teams to active seniors and families.

The City reserves the right to reject any proposal and may elect to make a decision without further discussion or negotiation. This solicitation is not to be construed as a contract of any kind. The City is not liable for any costs or expenses incurred in the preparation of responses to this RFQ, and may withdraw or modify this request at any time. The consultant selected for this project will be required to enter into a Professional Services Agreement with the City.

**GENERAL PROPOSAL PREPARATION**

1. **Execution of Proposal:** Proposals must be typewritten or prepared in ink and signed, in ink, by an authorized member of the submitting firm.
2. **Conformance to Proposal Requirements:** Proposals must conform to the requirements of the IRFP, which are shall be made a part of any ensuing contract. All requested attachments (references, descriptive literature, etc.) must be submitted with the Proposal and in the required format. Proposal prices must be for the unit indicated on the Proposal. Failure to comply with all requirements may result in Proposal rejection.
3. **Proposal Withdrawals:** Proposals may be withdrawn in writing on company letterhead signed by an authorized representative and received by the Contracts and Purchasing Office prior to Proposal closing time. Unopened Proposals withdrawn may be released to the company after voiding any date and time stamp used. Requests to withdraw mailed Proposals shall be marked “Proposal Withdrawal” and state Proposal name.
4. **Contact:** All questions should be directed to Liz Newton, either by phone at (503) 718-2412 or by email at [liz@tigard-or.gov](mailto:liz@tigard-or.gov).
5. **Proposed Schedule:**

Monday, October 5, 2015	Release of Informal Request for Proposal
Tuesday, October 20, 2015 – 2:00 pm	Proposals Due
Thursday, October 22, 2015	Interviews (if necessary)
Monday, October 26, 2015	Selection and Contract Award
October 27 – November 5, 2015	Meet with Consultant to Develop Survey Instrument
November 6 - 25, 2015	Administer Survey
November 30 - December 17, 2015	Analyze Responses and Communication Results
December 15, 2015	Present Survey Findings to City Council
January 2016	Conduct Focus Groups

**CONDITIONS AND INSTRUCTIONS**

1. A proposer certifies with their submittal that the proposal had been arrived at independently and has been submitted without collusion designed to limit independent bidding or competition.
2. The release of this IRFP does not commit the City to paying 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. Proposer shall defend, indemnify, and hold harmless City, City's officers, employees, agents and representatives from and against all liability, claims, demands, judgments, penalties, and causes of action of any kind or character, or other costs or expenses incidental to the investigation and defense thereof, of whatever nature, resulting from or arising out of the activities of the Proposer or its subsellers, agents, or employees under any contract arising from this IRFQ, except, however, that the foregoing shall not apply to liability that arises out of City's negligence.
4. Proposer agrees not to discriminate against any client, employee or applicant for employment or for services, because of race, color, religion, sex, national origin, handicap or age with regard to, but not limited to, the following: employment upgrading, demotion or transfer; recruitment or recruitment advertising; layoffs or termination; rates of pay or other forms of compensation;

selection for training; rendition of services. It is further understood that any proposer who is in violation of this clause shall be barred from receiving awards of any contract from the City, unless a satisfactory showing is made that discriminatory practices have terminated and that a recurrence of such acts is unlikely.

### **PROPOSAL SUBMITTAL REQUIREMENTS**

**1. Company Overview & Background**

Firms should provide a general description of the range of relevant activities performed by the firm. Firms should include details on their experience in performing opinion surveys for public agencies.

**2. References**

The name, address, and telephone number of three references for which the Consultant has performed public opinion survey services. At least one reference should be from a municipality.

**3. Cost Proposal**

A not-to-exceed figure to perform the scope of services listed above. Include, if applicable, hourly rates to perform work and a fee schedule for reimbursable expenses.

**4. Approach and Methodology**

An explanation of the approach and methodology used to perform the scope of work outlined above. Detail the methods and approach for reaching all demographic groups. Include the organization of project personnel and any additional assistance needed from outside sources.

**5. Additional Information**

Any other information about the Consultant that you believe would be applicable to this project.

### **PROPOSAL SUBMISSION & OPENING**

One (1) original copy and two (2) copies of a company's sealed proposal must be received and time-stamped on or before the stated closing time at the address listed below. To assure that your Proposal receives priority treatment, please mark as follows:

**IRFP– 2015 COMMUNITY SURVEY**

Tuesday, October 20, 2015 – 2:00 pm  
City of Tigard – Utility Billing Counter  
Attn: Joe Barrett, Buyer  
13125 SW Hall Blvd.  
Tigard, Oregon 97223

Companies submitting a Proposal shall put their name and address on the outside of the envelope. It is a company's responsibility to ensure that Proposals are received on or until the stated closing time. The City shall not be responsible for the proper identification and handling of any Proposals submitted incorrectly. Late Proposals, late modifications or late withdrawals shall not be accepted after the stated Proposal opening date and time and shall be returned unopened. Facsimile and electronic (email) Proposals will not be accepted.

### **PROPOSAL EVALUATION & AWARD**

**1. Pricing:** All Proposals submitted shall be binding for sixty (60) calendar days from the proposal closing date, unless extended by mutual consent of all parties.

2. **Evaluation Method:** Contract will be awarded based upon an evaluation of the received proposals. Proposals will be evaluated to identify the best overall fit for the City on this project. Awarded proposer must have substantially complied with all requirements and specifications of the IRFP and shall be expected to deliver promptly and perform reliably. The City will evaluate the submitted proposals using the following criteria:
  - A. Responsiveness and comprehensiveness of the proposal with respect to this RFQ;
  - B. Past experience with similar projects;
  - C. Creativity of approach to this particular project;
  - D. Information obtained from references; and
  - E. Consultant’s proposed cost to perform the scope of services.
  
3. **Delivery:** Significant delays in delivery of the system will be considered in determining award if early delivery is required.
  
4. **Method of Award:** The City reserves the right to make award to a single contractor or multiple contractors to the service outlined in this IRFP. Award may be made by service type, service location, or entire proposal, whichever is in the best interest of the City. The City and contractor(s) will enter into a personal services agreement for the work awarded under this IRFP.
  
5. **Insurance Requirements:** The City will require the awarded consultant to carry the following insurance in performance of the awarded work:

**A. Commercial General Liability Insurance**

Contractor shall obtain, at contractor’s expense, and keep in effect during the term of this contract, Comprehensive General Liability Insurance covering Bodily Injury and Property Damage on an “occurrence” form (1996 ISO or equivalent). This coverage shall include Contractual Liability insurance for the indemnity provided under this contract. The following insurance will be carried:

<b><u>Coverage</u></b>	<b><u>Limit</u></b>
General Aggregate	3,000,000
Products-Completed Operations Aggregate	2,000,000
Personal & Advertising Injury	1,000,000
Each Occurrence	2,000,000
Fire Damage (any one fire)	50,000
Medical Expense (any one person)	5,000

**B. Commercial Automobile Insurance**

Contractor shall also obtain, at contractor’s expense, and keep in effect during the term of the contract, Commercial Automobile Liability coverage including coverage for all owned, hired, and non-owned vehicles. The Combined Single Limit per occurrence shall not be less than \$2,000,000.

**C. Workers’ Compensation Insurance**

The contractor, its Subcontractors, if any, and all employers providing work, labor, or materials under this Contract that are subject employers under the Oregon Workers' Compensation Law shall comply with ORS 656.017, which requires them to provide workers'

compensation coverage that satisfies Oregon law for all their subject workers. Out-of-state employers must provide Oregon workers' compensation coverage for their workers who work at a single location within Oregon for more than 30 days in a calendar year. Contractors who perform work without the assistance or labor of any employee need not obtain workers' compensation coverage. All non-exempt employers shall provide Employer's Liability Insurance with coverage limits of not less than \$500,000 each accident.

**D. Additional Insured Provision**

The Commercial General Liability Insurance and Commercial Automobile Insurance policies and other policies the City deems necessary shall include the City, its officers, directors, and employees as additional insureds with respect to this contract.

**E. Insurance Carrier Rating**

Coverages provided by the Contractor must be underwritten by an insurance company deemed acceptable by the City. The City reserves the right to reject all or any insurance carrier(s) with an unacceptable financial rating.

**F. Certificates of Insurance**

As evidence of the insurance coverage required by the contract, the Contractor shall furnish a Certificate of Insurance to the City. No contract shall be effected until the required certificates have been received and approved by the City.

The procuring of such required insurance shall not be construed to limit contractor's liability hereunder. Notwithstanding said insurance, Contractor shall be obligated for the total amount of any damage, injury, or loss caused by negligence or neglect connected with this contract.

6. **Errors in Proposals:** When an error(s) is made in extending total prices, the unit Proposal price will govern. Proposals cannot be corrected and the any Contractor will be required to perform if their Proposal is accepted.
7. **Proposal Rejection:** The City may 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 a finding of the City that it is in the public interest to do so.
8. **Minor Informalities:** The City reserves the right to waive any and all minor informalities.
9. **Availability of Funds:** Any awarded contract resulting from this IRFP shall be deemed executory only to the extent of appropriations available to an issuing City Department for the purchase of such services. The City's extended obligations on those contracts that envision extended funding through successive fiscal periods shall be contingent upon actual appropriations for the following years.

## **SCOPE OF SERVICES**

**1. Background**

In 2012, a Mayor's Blue Ribbon Task Force was convened to examine Tigard's service and financial challenges and recommend a course of action to the city council.

One of the task force recommendations was to change the focus of the city's biennial community survey to ask residents specifically about services; which services they want, how they would

allocate existing resources to fund core services, and if they favor fees or charges tied to funding specific services.

The task force also recommended that the city develop a strategic plan that articulates a clear vision for the city. Our vision is to become "the most walkable community in the Pacific Northwest where people of all ages and abilities enjoy healthy and interconnected lives." The strategic plan is the guiding focus for investments and services for the future.

The Tigard City Council has among its five goals a commitment to expand opportunities to engage people in the community and pursue a creative, comprehensive approach to citizen engagement and education.

## **2. Scope of Work**

The scope of work to be performed by the Consultant will include, but is not limited to the following:

- A.** Work with staff to design and produce a survey instrument of between 20 to 30 questions.
- B.** Collect survey data that reflects the demographics of the community using collection methods designed to yield representative responses; including but not limited to land line and cell phone interviews, online options and focus groups and/or alternate data collection strategies as suggested and warranted by the Consultant. Results from a weighted phone survey should be presented as a stand-alone deliverable.
- C.** Design and conduct focus groups with a specific focus on participant's preferences for citizen engagement and communication.
- D.** Perform an independent analysis of the obtained data.
- E.** Tabulate survey results by a variety of criteria including demographics, the length of residency, area of residence within the City, and other identified criteria.
- F.** Provide a written report of the findings of the survey. The report should include: an executive summary; a detailed discussion of the findings; cross-tabulations of findings; graphs and tables to illustrate results; and summary of results and key findings.
- G.** Provide an oral report and presentation to the City Council summarizing the survey results.
- H.** Present survey findings to the City's executive staff team and supervisors.
- I.** Be available to respond to follow-up questions about survey results for at least three months after the survey results are presented.

## **3. Consultant Responsibilities**

The Consultant shall be responsible for securing any and all information, facilities, and other materials necessary for completing this project. City staff will be available times for Consultant's questions and information requests.