Department of Administrative Services

Enterprise Goods & Services - Procurement Services  
1225 Ferry Street  
Salem, Oregon 97301-4285

PHONE: 503-378-4642  
FAX: 503-373-1626

REVISED Exhibit D

Opportunity Notice

Best Value Analysis Process for Organizational Improvement Services

Insert Date:

To: Organizational Improvement Services Contractors – Service Category A

Opportunity Notice:  *Title of Project*

Attached to this Opportunity Notice is a statement of work for your consideration.

Issuing Agency:

Agency Contact Information:

Address:

Phone:

Email:

Due Date: a Contractor interested in this opportunity must submit its offer by\_\_\_\_\_\_\_\_\_, 20XX

[*Allow a minimum of 5 business days for Contractor to respond. Allow for longer response times for more complex projects.]*

Agency intends to award one Service Order Contract (SOC). The length of the SOC is estimated to be\_\_\_\_\_\_\_\_\_\_\_.

Agency Overview

[*Provide an overview of the Agency]*

Project Description *[The information included below cannot be deleted or changed. Based on your Agency need, things may be added to the information below.]*

January 11, 2023, Governor Kotek delivered a set of expectations to the leaders of Oregon state agencies that are focused on public administration (“Oregon Agency Expectations”). Among them is the expectation that all state agencies develop and follow a strategic plan using goals outlined by the Governor’s office, see Exhibit C, as well as have a current Diversity, Equity and Inclusion Plan. The strategic plan must also align with the Agency’s information technology strategy to include how modernization efforts will support the goals of the Agency. A template for the strategic plan

At a minimum, the strategic plan must include the following:

1. Define agency’s vision, mission and values & equity statement.
2. Conduct a pestle analysis.
3. Conduct a SWOT analysis.
4. Based on the SWOT analysis, set specific, measurable, achievable, relevant, and time-bound goals and objectives.
5. Develop strategies to determine the best course of action to achieve the Agency’s goals and objectives.
6. Create an action plan that outlines the specific steps the Agency will take to implement the strategies created.
7. Resource allocation, including financial, human, and technological, required to implement the action plan(s).
8. Determine how the Agency will continuously monitor the progress and evaluate the effectiveness of the strategies to determine if they should be adjusted.
9. Agency’s Diversity, Equity and Inclusion plan (“DEI Plan”), either to create a new DEI Plan or to update the Agency’s current DEI Plan. For specific information on what to include in the DEI Plan: <https://www.oregon.gov/das/Docs/DEI_Agency_Expectations_Guidance_Final.pdf>

[*Provide a description of the project and any additional information such as whether or not travel will be reimbursed, if specific industry expertise is required, such as law enforcement, education, health care, finance, etc*. *Or if there are additional elements your Agency wants to include in addition to those above, or if there is additional information that will be helpful for the Contractors to know about the project.*]

Schedule of Events:

|  |  |  |
| --- | --- | --- |
| **Event** | **Date** | **Time** |
| Opportunity Notice Issued |  |  |
| Due Date for Questions/Clarifications |  |  |
| Pre-Proposal Conference |  |  |
| Closing (Due Date and Time to submit Proposals) |  |  |
| Contractor Interviews | TBD | TBD |

Voluntary Pre-Submittal Conference: *[If you choose to not have a pre-submittal conference delete this section.]*

A voluntary pre-submittal conference will be held to explain the project and the Opportunity Notice. As well as to answer any questions Contractors may have regarding the project or Opportunity Notice. Statements made at the pre-submittal conference are not binding upon the State.

|  |  |
| --- | --- |
| Date: | Time: |
| Location: | |
| Phone Number: | |

Questions and Clarifications Requests:

Questions and requests for clarifications must be submitted via email to [yourname@oregon.gov](mailto:yourname@oregon.gov), by \_\_\_\_\_\_\_\_\_\_\_\_\_XX, 20XX at 2:00 PM. Official answers and clarification will be provided by me in writing, via email, to all solicited Organizational Improvement Services Contractors. Any oral communications will be considered unofficial and non-binding.

Submittal Content Requirements: *[Add any additional requirements necessary to your project, such as any sample reports or plans from previous projects or sample of how or what they would do for this project.]*

Submittals must include the following:

1. A detailed narrative describing your firms approach to the Project and accomplishing the tasks and deliverables.
2. A tentative project schedule that at a minimum includes the following:
   1. Deliverable due dates;
   2. Estimated number of hours to complete each deliverable required by the Statement of Work and for those identified by Contractor, for each Key Person identified in #4 below; and
   3. Total estimated cost to complete all deliverables.
3. A detailed narrative describing the experience, skills and knowledge your firm has, including subcontractors if used, as it relates to the services being requested, including DEI experience as it relates to the Agency’s strategic planning.
4. A list of each of the Key Persons and any subcontractors to be assigned to this project. The list must at a minimum include the following information:
   1. One (1) page resume of each Key Persons and subcontractors background, experience, expertise and training related to the specific work being requested;
   2. Specific roles and responsibilities of each Key Person and sub-contractor; and
   3. Each Key Person and sub-contractor hourly rate, as per Exhibit H of Contractor’s Price Agreement.

NOTE: If the execution of the work to be performed requires the hiring of sub-contractors, it must be clearly stated in the documents submitted. Sub-contractors must be identified and the work they will perform must be defined. Contractor shall also complete and submit with their proposal Exhibit B, Subcontractor sheet, to this Opportunity Notice. By filling out and submitting Exhibit B with each submission, Contractor is certifying that each subcontractor meets the minimum requirements set forth in this Opportunity Notice.

1. A statement of confirmation your firm has the ability to dedicate the staff listed above in #4 to this project within the specified timeframes.
2. A detailed narrative describing up to two (2) previous projects completed, preferably for Oregon State agencies or government entities, within the last three (3) years, and for which the proposed Key Persons (#4 above) provided similar services to those described in the Statement of Work. Information provided must at a minimum include the following:
   1. Client name, telephone number and address;
   2. Contact name (project manager), telephone number and email address;
   3. Description of services provided;
   4. Dates services were provided; and
   5. Staff assigned to the project, their project roles and work performed for the referenced project.
3. Contractor shall submit for each Key Person (sub-contractors included if used) a minimum of one reference for each of the pervious projects completed described above in #6. Contractor shall submit references on the provided Exhibit A to this Opportunity Notice.

Opportunity Notice BVA:

Offers received on or before the due date and time, will be reviewed by Agency. The firm offering the best value to the state will be selected based, in part, on the following criteria; *[If there are additional criteria you would like to evaluate add it here. Also, if something in the list doesn’t pertain to your project you can delete it. How each criteria is weighted (point allocation) is up to the evaluation team, just like in a normal RFP.]*

1. Demonstrated skill, experience and knowledge relevant to the services being requested; (XX Points Possible, or X% of total points)
2. Proposed approach to the services being requested; (XX Points Possible, or X% of total points)
3. Proposed cost; (XX Points Possible, or X% of total points)
4. Availability; (XX Points Possible, or X% of total points)
5. References; (XX Points Possible, or X% of total points) and
6. Resource Capacity (XX Points Possible, or X% of total points)

Agency reserves the right to include Contractor interviews as part of the BVA process. If Agency elects to conduct Contractor interviews, the top 3 Contractors with the highest first round evaluation scores will be included in the Contractor interviews. Contractors will be advised of the address, date and time. Onsite interview will be conducted in Salem, Oregon at a location to be determined by Agency. Contractors within a 60 mile radius of Salem, Oregon will be required to attend interviews in person. Contractors outside of a 60 mile radius of Salem, Oregon will be able to participate in interviews via teleconference.

Offers may be submitted via email ([your.name@oregon.gov](mailto:your.name@oregon.gov)) or on a CD or thumb drive containing electronic, Microsoft 2003 compatible or searchable Adobe format, or in hard copies to be delivered to the address above. If mailing your Offer, be sure to include the Opportunity title and to my attention.

Notice of Award:

Agency shall issue and send a notice of intent to award a Service Order Contract to all Contractors that submitted an Offer in response to this Opportunity Notice.

Protest of Award:

Pursuant to ORS 279B.410, an aggrieved Contractor may protest the award of the Service Order Contract. Contractor must submit its written protest to the undersigned within seven (7) days of the issuance of the notice of intent to award. The protest must state that Contractor is adversely affected because Contractor would be eligible for the award in the event the protest is upheld, because:

(A) All lower bids or higher ranked proposals are nonresponsive;

(B) Agency has failed to conduct the evaluation of proposals in accordance with the criteria or processes described in the solicitation materials;

(C) Agency has abused its discretion in rejecting the protestor’s bid or proposal as nonresponsive; or

(D) Agency’s evaluation of bids or proposals or the contracting agency’s subsequent determination of award is otherwise in violation of this chapter or ORS chapter 279A.

The undersigned shall respond to all protests in a timely manner.

Sincerely,

Insert Signer’s Name

Organization Improvement Services SOC

Statement of Work Template

1. Tasks and Deliverables

*[Add additional tasks and deliverables or delete as needed. Or include high level information about the expected work if tasks and deliverables are not known. ]*

The following tasks and deliverables shall be completed by Contractor:

Task #1: Define Agency’s Vision, Mission, and Values & Equity Statement

Contractor shall work with Agency to either create a new vision, mission and values & equity statement or revise and update Agency’s current vision, mission and values & equity statement.

Deliverable #1.1: Contractor shall provide to Agency the vision, mission and values & equity statement.

Task #2: Pestle Analysis

Contractor shall conduct a PESTLE analysis of the Agency and provide the results to the Agency. During the analysis, Contractor shall assist the Agency to identify and plan for any external factors that may affect the Agency.

Deliverable #2.1: Contractor shall provide to Agency the results of the PESTLE analysis conducted.

Task #3: SWOT Analysis

Contractor shall conduct a SWOT analysis of the Agency and provide the results to the Agency. Contractor shall engage key groups, as identified by the Agency.

Deliverable #3.1: Contractor shall provide to Agency the results of the SWOT analysis conducted.

Task #4: Goals and Objectives

Bases on the results of the SWOT analysis conducted in Task #3, Contractor shall work with the Agency to set goals and objectives. The goals and objectives must be specific, measurable, achievable, relevant and time bound.

In addition to the goals specific to the Agency, the goals must also include one related to Oregon Tribes and one gal must be related to achieving Diversity Equity and Inclusion.

Deliverable #4.1: Contractor must submit to Agency the written goals and objectives.

Task #5: Strategy Development

Contractor shall work with the Agency to develop strategies to achieve the goals and objectives created in Task #4. Agency and Contractor shall work together to determine the number of strategies needed to achieve all the goals and objectives.

Deliverable #5.1: Contractor shall submit to Agency the written strategies created.

Task #6: Action Plan

Working collaboratively with the Agency, Contractor shall develop an action plan that outlines the specific steps the Agency will take to implement the strategies created in Task #5.

Deliverable #6.1: Contractor shall provide to Agency the written action plan.

Task #7: Resource Allocation

Agency and Contractor shall work collaboratively to determine the resources needed to implement the action plan developed in Task #6. Resource allocation must at a minimum include the following:

* Financial
* Human
* Technological

Deliverable #7.1: Contractor shall provide to the Agency the resource allocation report.

Task #8: Monitor & Evaluate

Contractor shall work with the Agency to determine how the Agency will continuously monitor the progress and evaluate the effectiveness of the strategies created in Task #5, to determine if the strategies will need to be adjusted in the future. Contractor shall prepare a written report that details how the Agency will monitor the progress and evaluate the effectiveness of the strategies.

Deliverable #8.1: Contractor shall provide to agency the monitoring and evaluating written report.

Task #9: Diversity, Equity and Inclusion Plan

Contractor shall, either assist the Agency with developing a Diversity, Equity and Inclusion (“DEI”) plan, or reviewing the Agency’s current DEI plan and providing recommendations for updates or changes.

If providing recommendation for updates or changes to the current DEI plan, Contractor shall provide those recommendations in a written report.

If Contractor and Agency are creating a new DEI plan, Contractor shall provide to the Agency a draft and final DEI plan, for Agency review and comment. Contractor and Agency shall work together to incorporate the Agency’s recommended changes and additions.

Deliverable #9.1: Contractor shall provide a written report to Agency outlining their recommended changes or updates to Agency’s current DEI plan.

Deliverable #9.2: Contractor shall provide to Agency a draft DEI plan.

Deliverable #9.3: Contractor shall provide to Agency a final DEI plan.

1. Deliverable Schedule

*[If known, provide a table with the deliverables or milestones listed with the due dates you would like or leave blank for Contractor input.]*

1. Cost

*[Provide a separate attachment for the cost, such as an Excel spreadsheet, or provide a table with the deliverables or milestones for Contractor to input cost amounts.]*

**Exhibit A**

**Service Order Process Key Person Reference Form**

Contractor Reference #1

|  |  |
| --- | --- |
| Firm Name: |  |
|  |  |
| Address: |  |
|  |  |
| City, State & Zip: |  |
|  |  |
| Contact person: |  |
|  |  |
| Title: |  |
|  |  |
| Phone: |  |
|  |  |
| Email: |  |

Contractor Reference #2

|  |  |
| --- | --- |
| Firm Name: |  |
|  |  |
| Address: |  |
|  |  |
| City, State & Zip: |  |
|  |  |
| Contact person: |  |
|  |  |
| Title: |  |
|  |  |
| Phone: |  |
|  |  |
| Email: |  |

Contractor Reference #3

|  |  |
| --- | --- |
| Firm Name: |  |
|  |  |
| Address: |  |
|  |  |
| City, State & Zip: |  |
|  |  |
| Contact person: |  |
|  |  |
| Title: |  |
|  |  |
| Phone: |  |
|  |  |
| Email: |  |

**Exhibit B Joint Venture/ Partnership/ Subcontractor Sheet**

Will you be using a Joint Venture / Partnership to perform work, as identified in the RFP and Attachment A, Section 1:

Yes I will;  No I will NOT

CONTRACTOR MUST MARK ONE OF THE BOXES ABOVE.

Will you be using subcontractors to perform work, as identified in the RFP and Attachment A, Section 1 (Note: this will make you the PRIME contractor):

Yes I will;  No I will NOT

CONTRACTOR MUST MARK ONE OF THE BOXES ABOVE.

Submit the information below for each partner, joint venture, or sub-contractor.

**Note to Contractors: More sheets may be created by cutting, pasting and re-numbering the below sections as needed.**

**#1:**  Joint Venture  Partnership  Subcontractor

FIRM NAME: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

ADDRESS: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

CONTACT PERSON: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

POSITION TITLE: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

TELEPHONE NUMBER: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

E-MAIL:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**#2**  Joint Venture  Partnership  Subcontractor

FIRM NAME: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

ADDRESS: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

CONTACT PERSON: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

POSITION TITLE: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

TELEPHONE NUMBER: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

E-MAIL:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_