

State of Oregon



**PROPOSAL REQUEST
HECC #23-076
OregonBuys #S-52500-00008627**

November 6, 2023

To: Organizational Improvement Services Contractors – Service Categories: A - Business and Strategic Planning

Proposal Request: HECC Strategic Plan 4.0

Attached to this Proposal Request is a statement of work for your consideration.

Due Date: Firms interested in this opportunity must submit their proposals by 5:00 PM (Pacific Time) on November 21, 2023.

The Higher Education Coordinating Commission (hereafter “HECC” and “Agency” interchangeably) intends to award one contract not to exceed \$150,000 for the period of contract execution to December 31, 2024. Notwithstanding the forgoing, the Agency’s budget for this project is approximately \$50,000. Agency will **not** separately compensate Contractor for its travel expenses.

Schedule of Events:

Event	Date	Time
Due Date for Questions/Clarifications	November 14, 2023	5:00 PM

Closing (Due Date and Time to submit Proposals)	November 21, 2023	5:00 PM
Contractor Interviews	TBD	TBD

Questions and Clarifications Requests:

Questions and requests for clarifications must be submitted via email to derek.dizney@hecc.oregon.gov, by November 14, 2023 at 5:00 PM (Pacific Time). 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.

Proposal Content Requirements:

Proposals must include the following:

1. A detailed narrative describing your firms approach to the Project and accomplishing the tasks and deliverables. Please describe what your expectations are for the Agency regarding involvement.
2. A tentative project schedule that at a minimum includes the following:
 - a. Deliverable due dates;
 - b. Estimated number of hours to complete each deliverable required by the Statement of Work, with estimated hours allocated for each Key Person identified in #4 below; and
 - c. A detailed Cost Proposal that includes the following, based on the Statement of Work: identifiable costs for each activity, time estimates for completing each activity, and a summary of all proposed costs. Agency prefers proposals stating fixed fees for each deliverable to control costs, however, Agency will consider costs on an hourly basis as long as each task has a not-to-exceed limitation.
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.
4. A list of each of the Key Persons and any subcontractors to be assigned to this Project on provided Exhibit B. The list must at a minimum include the following information:
 - a. One page resume of each Key Persons and subcontractors background, experience, expertise and training related to the specific work being requested;
 - b. Specific roles, responsibilities, and capacity of each Key Person and sub-contractor; and
 - c. Each Key Person and sub-contractor hourly rate, as per Exhibit H of each contractor's respective master agreement.

NOTE: If the execution of the work to be performed requires the hiring of sub-contractors, it must be clearly stated in the proposal 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 A, Subcontractor sheet, to this Proposal Request.

5. A statement of confirmation your firm has the availability and ability to dedicate the staff listed above in #4 to this project within the specified timeframes.
6. A detailed narrative describing up to two previous projects completed, preferably for Oregon State agencies or government entities, within the last three 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:
 - a. Client name, telephone number and address;
 - b. Contact name (project manager), telephone number and email address;
 - c. Description of services provided;
 - d. Dates services were provided; and
 - e. Staff assigned to the project, their project roles and work performed for the referenced project.
7. A statement of how your firm furthers Diversity, Equity, Inclusion, and Accessibility, and how your firm intends to apply Agency's [Equity Lens](#) through this project.

Opportunity Notice—Best Value Analysis (BVA):

Proposals 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:

- a. Demonstrated skill, experience and knowledge relevant to the services being requested (30% of total points)
- b. Proposed approach to the services being requested (30% of total points)
- c. Proposed cost (20% of total points)
- d. Availability (10% of total points)
- e. Commitment to Diversity, Equity, Inclusion, and Accessibility as a firm and to this project (5% of total points) and
- f. Resource Capacity (5% of total points)

Agency reserves the right to include Contractor interviews as part of the BVA process.

Proposals may be submitted only via email to derek.dizney@hecc.oregon.gov, and must be Microsoft 2003 compatible or searchable Adobe format. Please include in the subject line both the HECC #23-076 and the OregonBuys #52500-00008627.

Sincerely,

Derek Dizney
Procurement Manager

Organization Improvement Services WOC Statement of Work Template

I. Agency Background Information

As a new state Commission in early 2014, the HECC adopted its [first Strategic Plan](#), “Pathways to Progress: A Strategy for Steering, Cheering, and Persevering to Achieve Oregon’s Higher Education Goals.” Nearly two years later, it adopted an updated [2016-2020 Strategic Plan](#) and, in 2017, a [Strategic Framework 2017-2021](#) that concisely summarized the Commission’s updated vision, mission, values, beliefs, and four key areas of strategic action for the Commission.

In August 2021, the Commission adopted a [Strategic Roadmap](#) for the future of postsecondary education and workforce training in Oregon. That document intended to describe, at a high level, what needed to change across various systems and institutions to achieve Oregon’s goals for postsecondary educational attainment and equity. While it drew from extensive surveys, focus groups, and interviews with Oregon leaders that took place in late 2019 and early 2020 (published as an [Insights Report](#)) and was originally intended to reflect a broad consensus among the HECC and a variety of educational and community partners, the untimely outbreak of the Covid pandemic diminished the amount of time that HECC staff and partners were able to dedicate to the consensus-building effort. The result is a document that reflected HECC’s aspirations for postsecondary education and training but that has not galvanized and organized as much activity among our institutional, legislative, and community partners as the HECC had hoped when it launched its ambitious effort in 2019.

II. Project Description, Context, and Questions to be Answered

For 2023-24, HECC proposes a new phase of strategic planning to culminate in “*HECC Strategic Plan 4.0*.” The completed plan should build on prior HECC work, including the 2021 Strategic Roadmap, but with a narrower focus on how HECC will exercise its leadership and statutory authority to advance State objectives. In this sense, the plan’s scope will come closer to resembling HECC’s earliest strategic plans that focused intently on identifying the Commission’s particular role and its specific opportunities for influence.

As accordance with ORS 350.075, *HECC Strategic Plan 4.0* should be designed to advance progress towards state goals for higher education and workforce development, including those contained in Oregon statutes as well as HECC’s legislatively-adopted Key Performance Measures. It should likewise be anchored in HECC’s [Equity Lens](#), which was updated in 2021 and expresses HECC’s commitment to achieving the “universal goal of educational equity” through “targeted strategies to eliminate racial disparities and other identity-based disparities.”

In November, 2023 the Agency’s Commission will evaluate and consider maintaining or updating the Vision Statement that the HECC first adopted in its

2017 Strategic Framework and affirmed in its 2021 Strategic Roadmap. It may also review the “Preamble” to the 2021 Strategic Roadmap, and will consider whether this statement still summarizes the type of transformation that they believe postsecondary education and training must undergo.

The four “Strategic Action Areas” that HECC described in its 2017 Strategic Framework continue to provide a useful synopsis of HECC’s primary tools for influencing outcomes, although HECC may want to reassess the Framework’s relevance upon the completion of its 2023-24 strategic planning process.

HECC’s Strategic Plan 4.0 should attempt to reflect and address key contemporary issues and dynamics affecting higher education and workforce development, including:

- a) Employers’ and the State of Oregon’s acute need for trained workers in critical industry and public service sectors.
- b) The falling percentage of recent Oregon high school graduates enrolling in higher education.
- c) Demographic trends including a projected decline in the number of traditional college-age students, as well as their increasing racial/ethnic diversity.
- d) Enrollment declines that have put substantial pressure on financial sustainability at some Oregon institutions of higher education and that may result in increased competition among them.
- e) Pandemic-induced effects including schooling gaps and their effect on learning, the widespread adoption of online education, and other innovations in education and training.
- f) The sharp increase in learners’ mental health and wellness needs.
- g) The emergence of artificial intelligence as a tool, and challenge, for higher education.
- h) Declining public perception about the value of higher education.

Strategic Plan 4.0 may address the following questions:

- a) Do the state’s statutory goals for postsecondary education remain appropriate today?
- b) What additional forms of transparency and accountability are necessary to provide the public and lawmakers confidence about the return on public investment in postsecondary education?
- c) What additional “system-like” properties does Oregon’s decentralized postsecondary education require in order to improve access, quality, and effectiveness – or are the existing arrangements (including the role played by the Agency and organizations such as the Oregon Council of Presidents and Oregon Community College Association) sufficient?
- d) Given public and legislative skepticism about the value of postsecondary education in the face of increasing costs and changing workforce needs, what

additional role, if any, should the State/HECC play in assuring the quality of postsecondary credentials?

- e) Given the increasing array of postsecondary credentials available to learners – including high value certificates offered outside of colleges and universities – how does HECC intend to “manage” and balance state investment and policy across multiple postsecondary sectors: e.g. public and private, colleges/universities vs. other training providers?
- f) What approach to budgets and funding should the legislature and the Agency take in 2025 and beyond in order to improve access, equity, affordability, and outcomes?
- g) What forms of innovation in postsecondary access, financing, and delivery will Oregon require in order to meet its goals? At what pace? What strategies should be employed to promote those innovations?
- h) What are the State’s goals and agenda for the development of new and applied knowledge through research, particularly given the associated benefits for the State’s economy? Whose responsibility is this agenda? How will it be developed, maintained, and implemented?

The Agency’s Commission will have final responsibility for the development and adoption of *HECC Strategic Plan 4.0*. In practice, that will likely mean setting aside time on monthly Commission meeting agendas over approximately the next year to review progress and provide direction. Commissioners may also be invited to share their perspectives with staff and/or a contractor in private individual or small group conversations. Finally, Commissioners will be encouraged to email articles or other background informational items to staff for dissemination to the full Commission.

Under the leadership of the Executive Director, HECC staff will be responsible for overseeing the work of the successful proposer (also referred hereafter to as “Contractor”) to develop materials (outlines, drafts, etc.) for the Commission’s review.

HECC partners -- including public and private colleges and universities, local workforce boards, employers, foundations, training organizations, community organizations, faculty, staff, students, and others – will provide critical input to the development of the Strategic Plan. HECC staff and the Contractor will conduct outreach to these constituencies at various points during the Plan’s development. Partners may also provide input to the Commission during public testimony at any Commission meeting.

III. Statement of Work, Tasks, and Deliverables

This proposed statement of work is an example of what the Agency thinks it may want. Proposer should use their experience and expertise to propose how the work shall progress, including the number, frequency, and content of: drafts of the strategic plan, interviews, surveys, and outreach sessions needed to complete the work.

The successful proposer shall design, coordinate and facilitate the strategic planning process. The successful proposer will guide the development and implementation of this strategic planning process to enhance the Agency's ability to achieve its strategic mission and goals. The successful proposer will work with the Agency's Commission and staff to develop an engaging and collaborative process that will result in a focused and prioritized five-year (2024-2029) Strategic Plan for the Commission.

Throughout the term of the resulting contract, the successful proposer shall keep in regular contact as agreed upon by the parties. This contact may consist of scheduled phone calls, scheduled in-person meetings, impromptu phone calls and email as needed. Prior to each interview and meeting with Agency's Commission members, leadership, staff, and interested parties, the successful proposer will inform Agency of the information that will be sought.

A. Task 1 – Kick Off meeting

Contractor shall facilitate an initial meeting at Agency's Salem Office with Agency leadership to discuss responsibilities, roles, and timelines to help develop the strategic plan.

Deliverable 1: Contractor shall prepare a work plan to use to track, manage, and complete all deliverables before the expiration of the contract.

B. Task 2 – Data Gathering

Drawing from the themes and readings already identified by the Commission and its staff, Contractor will gather additional data/responses through one-on-one and small group interviews with HECC Commissioners, HECC staff leadership, and key partners including institutional leaders, students, faculty, staff, community leaders, employers, accreditors, partner boards/agencies, and legislators (total approximately 20-30).

Deliverable 2: Completion of interviews and integration of the collected data into a report for Commission consideration.

C. Task 3 - Guidance

Contractor shall provide guidance to Agency's Commission members, leadership, staff, and partners during meetings and via other communication channels to identify, refine and track the Agency's strategic planning process.

Deliverable 3: Guidance that ensures buy-in and engagement from Commission members, staff leadership, partners, etc.

D. Task 4 – Completed Strategic Plan 4.0

Contractor shall work closely with the Commission and its staff in developing the strategic plan which will include:

- Vision, mission, and goal statements.
- Prioritized action steps that provide short and long-term direction.
- At least one draft of the strategic plan no later than October 15, 2024.

Deliverable 4: A completed *Strategic Plan 4.0*.

All deliverables shall be completed November 30, 2024, unless the parties mutually agree otherwise. HECC reserves the right to adjust this due date in its sole discretion.

Exhibit A
Joint Venture/ Partnership/ Subcontractor Sheet

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

☐ Yes I will; ☐ No I will NOT

PROPOSER MUST MARK ONE OF THE BOXES ABOVE.

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

☐ Yes I will; ☐ No I will NOT

PROPOSER MUST MARK ONE OF THE BOXES ABOVE.

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

Note to Proposers: 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: _____

Exhibit B
Key Persons

Contractor's Key Person #1	
Name:	
Title/Role:	
Phone:	
Email:	

Contractor's Key Person #2	
Name:	
Title/Role:	
Phone:	
Email:	

Contractor's Key Person #3	
Name:	
Title/Role:	
Phone:	
Email:	

Contractor's Key Person #4	
Name:	
Title/Role:	
Phone:	
Email:	

Contractor's Key Person #5	
Name:	
Title/Role:	
Phone:	
Email:	

Contractor's Key Person #6	
Name:	
Title/Role:	
Phone:	
Email:	