

## *Attachment 3 – Submittal Requirements*

### INSTRUCTIONS

#### SUBMISSION REQUIREMENTS

The following describes the required format for providing a response to this RFP. SUB reserves the right to consider non-responsive any submission that does not adhere to this format. The purpose of this section is to ensure uniformity in the submission of information essential to the understanding and evaluation of each firm's qualifications. There is no intent to limit the contents of responses.

Pursuant to ORS 192.345; 646.461 to 646.475, all information contained in the response designated as confidential must be clearly marked at the time the response is submitted.

#### CONFIDENTIAL INFORMATION

The proposal should identify any confidential information that the Proposer contends is exempt from disclosure under ORS 192.345. SUB will endeavor in good faith to honor appropriate requests for exemption from disclosure, but SUB reserves exclusive discretion to determine whether information qualifies for a statutory exemption.

1. Proposal Form -- Each response shall contain the Proposal Form from the RFP document, with all requested information completed, and signed by an authorized representative.
2. General – Proposals must not exceed fifty (50) pages in length, excluding the sample report and cover letter. Proposals will be clear and concise. SUB encourages green options and discourages the use of materials that cannot be recycled such as PVC and spiral binders, plastic or glossy covers and dividers. Further, the SUB encourages Proposers to print on both sides of a sheet of paper and submit files electronically whenever possible.
3. Cover Letter – All Proposals must be accompanied by a cover letter signed by an individual who is legally authorized to enter into a contract on behalf of the proposing firm and will include the following:
  - The Date and Project Name
  - A signature of an authorized representative
  - The Name, Title, Phone Number, and email address of the contact person who will receive notices related to the RFP
  - May also include an executive summary up to 500 words
4. Project Understanding – A narrative demonstrating the Proposer's understanding of Springfield's needs, goals, and objectives as related to this project. Include a detailed description of project methodology, including key phases and milestones. The Proposal shall

describe, the steps the Proposer would take to complete the project in order to minimize costs, provide services in a timely manner, and ensure project quality.

5. Project Work Plan and Timeline – A detailed description of the proposed approach to providing the requested services. Include the sequence of activities to be undertaken and identification of specific tasks and deliverables within each activity. Include milestone completion dates. Allow ample time for SUB staff review of the draft products and subsequent revisions.
6. Project Deliverables – A detailed description of products including, but not limited to: progress reports; reports and drawings (draft and final); and other applicable materials. As applicable, identify the deliverable by project task, including size, number, media, and format.
7. Project Team – Identification of key personnel who will be working on the project, as well as an itemization of each member's direct involvement by task. Specify a Project Manager and primary contact person for project delivery. Include project team member profiles complete with a brief description of qualifications. For key personnel, show the amount of time they will commit to the project. where individuals with specialized expertise will add value to this project, identify how their time will be used (i.e. senior review, technical review, design development, etc.).

Provide names and resumes for the primary and one alternate for each of the above key personnel. If the proposing firm is small and cannot provide a full list of alternates, the firm should provide narrative showing how it intends to maintain quality of service in case of personnel changes.

8. Firm History - Explain the firm's experience and work; the Proposal shall include the following:
  - Name of the firm and the managing principal.
  - Principal place of business and all field offices. Identify the location(s) of the SUB project key employees.
  - Size of the firm and current workload.
  - The number of years the firm has been in business.
  - Provide list of potential sub-consultants, and their roles, engaged by the firm for similar projects.
  - Describe what special services, systems, or qualifications the firm has that would benefit SUB in carrying out this project.
9. Similar Projects & References – *This section should only describe those appropriate projects completed by the Project Manager or key technical support team members.* Clearly specify the name and title of each individual and level of involvement in the project.
  - Please include a minimum of three references and contact information from recent clients (within the last 2 years) involving projects of similar nature provided to public agencies.

- Summarize the firm's related experience and recent projects executed over the last five years.
  - The names and addresses of any clients of the Proposer or any other persons or entities who have made claims against the Proposer within the last five years alleging that the Proposer breached a contract for services, was negligent in performance of services, or otherwise caused harm or damage to the claimant. Describe the nature and current status of the claims.
10. Sample Report – Include a sample report, in electronic format, from previous work from the project team for a Tier 2 review. (Not part of 50 page limit)
  11. Fees and Expenses – Describe the anticipated fee structure including labor, reproduction, equipment and travel.
  12. Additional Services - If the Proposer believes that there are additional services that may be appropriate for this proposal but are not identified in this RFP, Proposer should include a description of the additional services recommended and describe how the additional services would benefit SUB.