



CITY OF ALBANY, OREGON

FINANCE DEPARTMENT

Solicitation RFP#240312

REVISED APRIL 22, 2024

REQUEST FOR PROPOSALS

FOR

Insurance Agent of Record

Issue Date: Wednesday, March 27, 2024

Due Date: Wednesday, April 24, 2024, 2:00 p.m. (Pacific Time)

Finance Director **Jeanna Yeager**
Finance Manager **Casey Headley**
Contracts and Procurement Officer **Diane M. Murzynski, NIGP-CPP, CPPO, CPPB**

**For more information regarding this Request for Proposals,
email contracts@albanyoregon.gov.**

CITY OF ALBANY, OREGON

TABLE OF CONTENTS

TABLE OF CONTENTS 1

PROPOSER’S SUBMITTAL CHECKLIST..... 2

REQUEST FOR PROPOSALS (RFP) 3

SECTION 1 – INTRODUCTION..... 5

SECTION 2 – INSTRUCTIONS TO PROPOSERS..... 7

SECTION 3 – SCOPE OF WORK..... 16

SECTION 4 – PROPOSAL SUBMITTAL REQUIREMENTS..... 21

SECTION 5 – EVALUATION CRITERIA AND CONTRACT AWARD..... 26

EXHIBIT A – COST PROPOSAL – REVISED 4-22-24..... 29

EXHIBIT B - REFERENCES..... 31

EXHIBIT C – PROPOSAL CERTIFICATION..... 33

EXHIBIT D – CERTIFICATION FOR CORPORATION OR INDEPENDENT CONTRACTOR..... 34

EXHIBIT E – RESPONSIBILITY CERTIFICATION..... 35

EXHIBIT F – INSURANCE REQUIREMENTS..... 36

ATTACHMENT A – **SAMPLE CONTRACT** 38

ATTACHMENT B – DEFINITIONS 49

LIST OF APPENDICES 54

PROPOSER'S SUBMITTAL CHECKLIST

Proposals must be received by the time and date designated in the Request for Proposals (RFP). It is the responsibility of the Proposer to submit the proposal response before the indicated deadline to the designated location. The City is not responsible for late or mishandled delivery, equipment or software failure, internet or website downtime, corrupt or unreadable data, or other technical issues that may cause delay or non-delivery of a proposal or inaccessibility of the submitted data. Proposals received in the procurement email repository after the designated closing time will be determined late, nonresponsive and will not be accepted. If the Proposer obtains these documents by means of a website, electronic bulletin board, or copied from a plan center, it is the responsibility of the Proposer to check for any addenda.

All proposals ~~should be received electronically~~, must be submitted in non-editable PDF format (no links) and must use City-provided forms, if applicable, without unauthorized alterations. The total size limit for each email submittal response must be less than 20 MB. An automated response should be generated back to the sender stating, "Proposal has been received by the City." If you do not receive a notification, you may contact Diane Murzynski at contracts@albanyoregon.gov or 541-917-7522.

Proposer is responsible for ensuring it has the technical capability to submit its Proposal via electronic submission. Proposer shall be solely responsible for ensuring timely submission of the Proposal and is highly encouraged to prepare and allow for sufficient time to familiarize itself with the electronic submission requirements and to address any technical or data issues prior to the Proposal due date.

The following should be received to be considered responsive:

- Cover Page, Table of Contents, Transmittal Letter, Disclosure Statement
- Management Letter & Financial Strength
- Experience & Qualifications
- Project Understanding and Approach
- REVISED Cost Proposal – Exhibit A**
- References – Exhibit B
- Proposal Certification
- Certification for Corporation or Independent Contractor
- Responsibility Certification
- Insurance Requirements & Evidence of Insurance
- Acknowledgement of all addenda on Proposal Certification, if applicable
- One Complete Redacted Copy of Proposal for Public Disclosure or a Written Statement of no Redaction must be Indicated on the Proposal Certification

Other than what is listed above, it is not necessary to submit any additional pages with the proposal.



CITY OF ALBANY, OREGON

REQUEST FOR PROPOSALS (RFP)

Insurance Agent of Record

Proposals Due by 2:00 p.m. (Pacific Time), Wednesday, April 24, 2024

Notice is hereby given that the City of Albany ("City") is requesting proposals for an Insurance Agent of Record for risk management and insurance brokerage consulting services. The City desires to enter into a professional services agreement with a qualified firm that can demonstrate competency and experience providing risk management and insurance brokerage consultation and is a certified CityCounty Insurance Services (CIS) Risk Management Advisor. The contract is for a five-year term, commencing July 1, 2024, with an option to extend the contract two additional, one-year terms.

The scope of work includes the following:

- Provide assistance with the annual renewal specifications for property, liability, workers' compensation, and crime coverage insurance.
- Provide a premium allocation report to distribute the City's insurance premiums to respective departments.
- Assist City staff with risk management issues and preparation of the annual risk management report.
- Present the annual risk management report to the City Council and attend City Council meetings upon City's request.
- Assist City staff with review of insurance certificates and contract risk exposure.
- Assist City staff with the development of standard insurance language and hold harmless provisions for contracts and agreements.

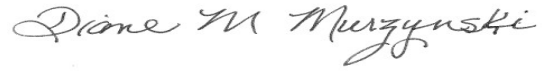
Solicitation documents may be downloaded from the City of Albany website at <https://albanyoregon.gov/bids>, or examined at Albany City Hall, Finance Department, 333 Broadalbin Street SW, Albany, OR 97321, Monday through Friday, 8:00 a.m. to 5:00 p.m. There is a \$35 charge to receive a printed copy of the documents.

It is imperative that those who download the solicitation documents check the website regularly for addenda, clarifications, and other notifications that may be pertinent. Proposers are solely responsible for checking the website to determine if addenda or clarifications have been issued. For questions regarding the solicitation, contact Diane Murzynski, CPPO, Contracts and Procurement Officer, at diane.murzynski@albanyoregon.gov, and contracts@albanyoregon.gov.

Time is of the essence to acquire a qualified firm to provide the required services within the timeline required by the City. Proposal responses shall be submitted electronically to Diane Murzynski, in the Finance Department, at procurement@albanyoregon.gov, and must be received not later than 2:00 p.m., (Pacific Time), Wednesday, April 24, 2024, or any extension of the time made by addendum. Submittals will be considered time-stamped and received by the City when received in the procurement email inbox. The email subject line should include the project name "Insurance Agent of Record". Proposals received after the closing date and time will not be opened or reviewed. There will be no formal opening. Proposals shall be valid for 120 days after opening unless otherwise specified.

The City may reject any proposal not in compliance with all prescribed solicitation procedures and requirements and other applicable law and may reject any or all proposals in whole or in part when the cancellation or rejection is in the best interest of the City, and at no cost to the City.

DATED THIS 27TH DAY OF MARCH 2024.



Diane M. Murzynski, NIGP-CPP, CPPO, CPPB
Contracts and Procurement Officer

PUBLISH: Daily Journal of Commerce, on Wednesday, March 27, 2024
City of Albany Website, on Wednesday, March 27, 2024

SECTION 1 – INTRODUCTION

1.1 BACKGROUND

The City of Albany is a municipal governmental entity providing a full range of services, including police and fire protection; land use planning; sewer services; water services; construction and maintenance of streets, and infrastructure; recreational activities, and cultural events. The City of Albany, with a population of 57,289 (World Population Review 2023), is the eleventh largest City in Oregon. Located at the confluence of the Willamette and Calapooia Rivers, the city of Albany lies within both Benton and Linn counties. Albany is the largest city in Linn County and serves as the county seat. Albany is also the second largest city in Benton County. From its river town beginnings, Albany has grown south and east with the railroads, state highways and Interstate 5 and across the Willamette into the farms and wooded hillsides of North Albany.

Albany operates under a home-rule charter in a council-manager form of government. Albany is led by an elected, non-partisan seven-member council. The council consists of the mayor and six council members. The mayor is elected at-large every two years; councilors are elected for overlapping four-year terms within three city wards. The city manager serves at the pleasure of the council. The council meets on the 2nd and 4th Wednesdays of most months and conducts work sessions the Monday prior to regularly scheduled Wednesday meetings (with some exceptions).

Albany employs approximately 427.40 FTE employees who work in one of nine departments. The departments include Police, Fire, Parks and Recreation, Library, Human Resources, Finance, Information Technology, Public Works Engineering and Operations, and Community Development.

The City has long been committed to excellence in fiscal administration, striving for the highest standards of performance and accountability. The City strives to maintain a high bond rating, currently AA- from Standard & Poor's and Aa3 from Moody's and will receive credit ratings on all its bond issues. Funding strategies to support debt obligations are implemented prior to debt payments to ensure debt obligations can be met from current revenues.

The City of Albany's Capital Improvement Program (CIP) is updated annually and is a means of communicating how resources may be allocated to projects. The process is a planning tool and provides an opportunity for the City Council, Planning Commission, Budget Committee, as well as City staff and the public, to review projects and priorities prior to budget adoption in June. During these current economic times, it is the City Council decision makers who ultimately are given the responsibility to balance the competing interests while making important decisions regarding funding and projects.

More information about the City of Albany is available on the website at:

- City of Albany; <https://albanyoregon.gov>
- Financial and budgetary information, policies, City biennial budget documents, and the Annual Comprehensive Financial Reports (ACFR); <https://albanyoregon.gov/finance>
- ARA biennial budget documents and annual financial reports; <https://albanyoregon.gov/cara/budget>
- Five-year CIP; <https://www.albanyoregon.gov/pw/engineering/capital-improvement-program>

- Central Albany Revitalization Area; <https://albanyoregon.gov/cara>
- Municipal Code and City Charter; <https://albanyoregon.gov/council/municipal-code>
- Citizen Advisory Groups (CAG); <https://albanyoregon.gov/council/groups>
- Strategic Plan; <https://albanyoregon.gov/strategic-plan>

1.2 SERVICES REQUIRED

The City desires to enter into a contract with a qualified risk management and insurance brokerage consulting firm to act as the City of Albany's Insurance Agent of Record. The advisor shall be a certified City/County Insurance Services (CIS) risk management advisor and may be asked to provide consultation on related issues by the City finance department. The objective of requesting proposals is for the City to determine which Firm can offer the highest quality of service at a cost representing the best value to the City.

1.3 PROCUREMENT SOURCING METHOD AND FUNDING

The City will use a procurement and source selection method based on an advertised formal, competitive request for proposals in accordance with ORS 279B.060. Responses to this RFP will be reviewed, scored, and ranked according to the criteria defined herein. No federal funding will be used for procurement of these services.

SECTION 2 – INSTRUCTIONS TO PROPOSERS

2.1 ISSUING OFFICE AND SUBMITTAL LOCATION

The City Contracts and Procurement Officer will issue the Request for Proposals document and will be the sole point of contact for questions, concerns, and protests.

Submittal Address:

City of Albany
Finance Department
Diane M. Murzynski, NIGP-CPP, CPPO, CPPB
Contracts and Procurement Officer
diane.murzynski@albanyoregon.gov
333 Broadalbin Street SW, Albany, OR 97321

Proposal responses must be submitted to procurement@albanyoregon.gov.

2.2 RFP SCHEDULE

The following general timeline will be used for receiving and evaluating proposals. The timeline listed below may be changed if it is in the City's best interest to do so.

RFP Advertised	March 27, 2024
Date to Submit Changes or Solicitation Protests	April 8, 2024, 2:00 p.m.
Last Day to Submit Questions	April 17, 2024, 12:00 p.m.
Last Day for Addenda Issued	April 19, 2024, 12:00
Proposal Due Date	April 25, 2024, 2:00 p.m.
Evaluate Proposals	April 25 – April 30, 2024
Optional Interviews	May 1-2, 2024
Notice of Intent to Award	May 3, 2024
Protest period ends (seven calendar days)	May 10, 2024, 12:00 p.m.
Council Contract Award	June 12, 2024
Contract Execution	June 19, 2024
Contract begins	July 1, 2024

2.3 CHANGES TO THE SOLICITATION DOCUMENTS BY ADDENDA

The City of Albany reserves the right to make changes to the RFP by written addenda posted on the City of Albany website. A prospective Proposer may request a change to the RFP by submitting a request to contracts@albanyoregon.gov. The request must specify the provision of the RFP in question and contain an explanation for the requested change. All requests for changes or additional information must be submitted no later than the date set forth in the RFP Schedule.

The City of Albany will evaluate any request submitted but reserves the right to determine whether to accept the requested change. If in the Contracts and Procurement Officer's opinion, additional information or interpretation is necessary; such information will be supplied in the form of an addendum. Any addenda will have the same binding effect as though contained in the main body of the RFP. Oral instructions or information concerning the scope of work of the project given out by City of Albany managers, employees, or agents to the prospective Proposers will not bind the City of Albany.

1. All addenda, clarifications, and interpretations will be posted on the City of Albany's website at <https://albanyoregon.gov/bids>.
2. No addenda will be issued later than the date set forth in the RFP Schedule, except an addendum, if necessary, postponing the date for receipt of Proposals, withdrawing the invitation, modifying elements of the proposal resulting from a delayed process, or requesting additional information, clarifications, or revisions of proposals leading to obtaining best offers or best and final offers.
3. Each Proposer must ascertain, prior to submitting a proposal response, that the Proposer has received all addenda issued, and receipt of each must be acknowledged on the Proposal Certification form.

2.4 TRADE SECRETS AND PUBLIC RECORDS LAW

All information submitted by Proposers will be public record, and the City of Albany will make available to any person requesting information through the City of Albany's processes for disclosure of public records, any and all information submitted and subject to disclosure, pursuant to the Federal Freedom of Information Act (FOIA) and the Oregon Public Records Act, ORS 192, except such portions of the proposals for which Proposer requests exception from disclosure consistent with Oregon law, ORS 192.345, and specifically marked "proprietary" or "confidential". All requests will be in writing, noting specifically which portion of the proposal the Proposer requests exception from disclosure.

Proposer must not copyright, or cause to be copyrighted, any portion of any said document submitted to the City of Albany as a result of this RFP. Proposer should not mark the whole proposal document "confidential". If a proposal contains any information that is considered a trade secret under ORS 192.345(2). Proposers must mark each sheet of such information with the following legend: "This data constitutes a trade secret under ORS 192.345(2) and will not be disclosed except in accordance with the Oregon Public Records Law." Any proposal marked as a trade secret in its entirety will be considered nonresponsive.

2.5 CANCELLATION

ORS 279B.100 provides for cancellation, rejection, or delay of proposals when the cancellation or rejection is in the best interest of the City as determined by the City. The City of Albany reserves the right to cancel award of this contract at any time before execution of the contract by both parties if cancellation is deemed to be in the City of Albany's best interest. In no event will the City of Albany have any liability for the cancellation of award.

2.6 LATE PROPOSALS, WITHDRAWALS AND MODIFICATIONS

Proposals must be submitted by the time designated in the RFP Schedule. Any proposals submitted after the designated closing time will be considered late and determined nonresponsive. A Proposer's request for modification of a proposal, or withdrawal of a proposal received after closing date and time, is late. The City will not consider late proposals, late requests for modifications, or late withdrawals.

2.7 CONDITIONS OF SUBMITTAL

By the act of submitting a response to this RFP, the Proposer certifies:

1. The Proposer and each person signing on behalf of any Proposer certifies, and in the case of a sole proprietorship, partnership or corporation, each party thereto certifies as to its own organization, under penalty of perjury, that to the best of their knowledge and belief, no elected official, officer, employee, or person, whose salary is payable in whole or in part by the City of Albany, has a direct or indirect financial interest in the proposal, or in the services to which it relates, or in any of the profits thereof other than as fully described in the Proposer's response to this solicitation.
2. The Proposer has examined all parts of the request for proposal, including all requirements and contract terms and conditions thereof, and, if its proposal is accepted, the Proposer must accept the contract documents thereto unless substantive changes are made in same without the approval of the Proposer.
3. The Proposer, if an individual, is of lawful age; is the only one interested in this proposal; and that no person, firm, or corporation, other than that named, has any interest in the proposal, or in the proposed contract.
4. The Proposer has demonstrated quality experience providing the required goods and/or services, or consulting services, whichever is applicable.
5. The Proposer has examined the scope of services and conditions thoroughly and can provide the appropriate insurance, deposits, and bonds, if applicable.
6. The Proposer will comply fully with the scope of services for the agreed contract.
7. The Proposer can meet any and all registration and certification requirements as set forth and required in the Oregon Revised Statutes and this RFP.

2.8 PROPOSER REQUESTS INTERPRETATION OF RFP DOCUMENTS

1. Proposers must promptly notify the City of Albany of any ambiguity, inconsistency, or error, which they may discover upon examination of the solicitation documents.
2. Proposers requiring clarification or interpretation of the Documents must make a written request for same to Diane Murzynski, CPPO, Contracts and Procurement Officer, at contracts@albanyoregon.gov.
3. The City of Albany will make interpretations, corrections, or changes of the solicitation documents in writing by published addenda. Interpretations, corrections, or changes of the proposal documents made in any other manner will not be binding, and Proposers must not rely upon such interpretations, corrections, and changes.
4. Should any doubt or difference of opinion arise between the City of Albany and a Proposer as to the items to be furnished hereunder or the interpretation of the provisions of this solicitation, the decision of the City of Albany will be final and binding upon all parties.
5. To the maximum extent allowed by law, the City may waive bid/proposal irregularities or strict compliance with any requirement herein if it concludes such action to be in its best interest.

2.9 PROPOSER REQUESTS FOR ADDITIONAL INFORMATION

Requests for information regarding City of Albany services, programs, or personnel, or any other information must be submitted to Diane Murzynski, Contracts and Procurement Officer, at contracts@albanyoregon.gov. Answers will be provided to all Proposers of record on the date that answers are available by posting to the City website.

2.10 COMPETITION

Proposers are encouraged to comment, either with their proposals or at any other time, in writing, on any specification or requirement within this RFP, which the respondent believes, will inordinately limit competition.

2.11 SOLICITATION PROTESTS

A protest of any provision in this RFP must be made in writing and emailed to Diane Murzynski, CPPO, Contracts and Procurement Officer, at procurement@albanyoregon.gov no later than the date listed in the RFP Schedule. Submittals will be reviewed upon receipt and will be answered in writing. Any protest must address the requirement, provision or feature of this RFP or its attachments, that the potential Proposer believes is ambiguous, unclear, unfair, contrary to law or likely to limit competition. Such submittals will be reviewed upon receipt and will be answered in writing.

In addition to the information required by ORS 279B.405(4), a Prospective Proposer's written protest must include a statement of the desired changes to the procurement process or the solicitation document that the prospective Proposer believes will remedy the conditions upon which the prospective Proposer based its protest. No such protests or requests will be considered if received after the deadline or requests are incomplete. No oral, telegraphic, telephone protests or requests will be accepted.

2.12 COST OF RFP AND ASSOCIATED RESPONSES

This RFP does not commit the City of Albany 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. Responses to this solicitation are purely voluntary. Proposers must not include any such expenses as part of their proposals.

2.13 CITY TO REQUEST CLARIFICATION, ADDITIONAL RESEARCH, AND REVISIONS

1. The City of Albany reserves the right to obtain clarification of any point in a proposal or to obtain additional information necessary to properly evaluate a proposal. Failure of a Proposer to respond to such a request for additional information or clarification could result in a finding that the Proposer is nonresponsive and consequent rejection of the proposal.
2. The City of Albany may obtain information from any legal source for clarification of any proposal or for information on any Proposer. The City of Albany need not inform the Proposer of any intent to perform additional research in this respect or of any information thereby received.
3. The City of Albany may perform, at its sole option, investigations of the responsible Proposer. Information may include, but will not necessarily be limited to credit history, recent financial statements, current litigation, bonding capacity, and related history, and contacting references. All such documents, if requested by the City of Albany, become part of the public record, and

may be disclosed accordingly.

4. The City reserves the right to investigate references including customers other than those listed in the Proposer's submission. Investigation may include past performance with respect to its successful performance of similar projects, conformance to Owner's budget, compliance with specifications and contractual obligations, its completion or delivery of a project on schedule, and its lawful payment to employees and workers or other criteria as determined by the City.
5. The City of Albany reserves the right to request revisions of proposals after the submission of proposals and before award.
6. The City of Albany reserves the right to negotiate revisions to the final contract, as well as price, with the successful Proposer.
7. The City of Albany reserves the right to request revisions of proposals after the submission of proposals and before award for the purpose of obtaining best offers or best and final offers.

2.14 REJECTION OF PROPOSALS

The City of Albany reserves the right to reject any or all proposals received as a result of this request. Proposals may be rejected for one or more of the following reasons, including but not limited to:

1. Failure of the Proposer to adhere to one or more of the provisions established in this RFP.
2. Failure of the Proposer to submit a proposal in the format specified herein.
3. Failure of the Proposer to submit a proposal within the time requirements established herein.
4. Failure of the Proposer to adhere to ethical and professional standards before, during, or following the proposal process.

The City of Albany may reject any proposal not in compliance with all prescribed public procurement procedures and requirements and may reject for good cause any or all proposals upon a finding of the City of Albany that it is in the public interest to do so.

2.15 MODIFICATION OR WITHDRAWAL OF PROPOSAL BY PROPOSER

1. A proposal may not be modified, withdrawn, or canceled by the Proposer for 120 calendar days following the time and date designated for the receipt of proposals.
2. Proposals submitted early may be modified or withdrawn only by email to the City of Albany Contracts and Procurement Officer, at the submittal location, prior to the time designated for receipt of proposals. All such communications will be so worded as not to reveal the amount of the original proposal or any other material contents of the original proposal.
3. Withdrawn proposals may be resubmitted up to the time designated for the receipt of proposals provided they are then fully in conformance with the proposal submittal instructions.

2.16 DURATION OF PROPOSAL

Proposal prices, terms and conditions will be firm for a period of at least 120 days from the deadline for receipt of submittal. The successful proposal will not be subject to future price escalation or changes of terms if accepted during the 120 calendar-day period. Price decreases or changes in terms by others after the acceptance of a proposal will not be considered.

2.17 AFFIRMATIVE ACTION

By submitting a proposal, the Proposer must agree to comply with the Fair Labor Standard Act, Title VII of the Civil Rights Act of 1964, Executive Order 11246 (as amended), Fair Employment Practices, Equal Employment Opportunity Act, Section 503 of the Rehabilitation Act of 1973, as amended; Vietnam Era Veterans' Readjustment Assistance Act of 1974; Americans with Disabilities Act; Age Discrimination in Employment Act of 1967 (ADEA); and Oregon Revised Statutes; and all applicable requirements of federal, state and local civil rights and rehabilitation statutes, rules and regulations if awarded a contract by the City.

2.18 CERTIFICATION OFFICE FOR BUSINESS INCLUSION AND DIVERSITY (COBID)

The Oregon Business Development Department, through the Certification Office for Business Inclusion and Diversity, is the sole agency that may certify enterprises and businesses as disadvantaged business enterprises, minority-owned businesses, woman-owned businesses, businesses that service-disabled veterans own and emerging small businesses that are eligible to perform public contracts in this state. Proposer must agree not to discriminate against a disadvantaged business enterprise, a minority-owned business, a woman-owned business, a business that a service-disabled veteran owns, or an emerging small business enterprise certified under ORS 200.055 in awarding subcontracts as required by ORS 279A.110. The State of Oregon provides a certification directory for MWESB Contractors <https://www.oregon.gov/biz/programs/cobid/pages/default.aspx>. Proposers must consider MWESB Contractors for subcontracting opportunities.

If the contract is awarded on the basis of Proposer's certification as a Disadvantaged Business Enterprise (DBE), Minority/Women-owned Business Enterprise (MWBE), Service-disabled Veteran, and Emerging Small Business (ESB) certifications (collectively known as MWESBs), Proposer must remain certified during the entire term of the contract. Proposers must include a similar provision in any subcontracts for the project.

2.19 PAY EQUITY COMPLIANCE

As required by ORS 279B.235, all Proposers must comply with ORS 652.220 and will not unlawfully discriminate against any of Proposer's employees in the payment of wages or other compensation for work of comparable character on the basis of an employee's membership in a protected class. "Protected class" means a group of persons distinguished by race, color, religion, sex, sexual orientation, national origin, marital status, veteran status, disability, or age. Proposer's compliance with this section constitutes a material element of this contract and a failure to comply constitutes a breach that entitles the City to terminate this contract for cause.

Proposer may not prohibit any of their employees from discussing the employee's rate of wage, salary, benefits, or other compensation with another employee or another person. Proposer may not retaliate against an employee who discusses the employee's rate of wage, salary, benefits, or other compensation with another employee or another person.

If the contract is valued at \$500,000 or more and the Proposer has 50 or more employees, then the Proposer is required to complete Pay Equity Training through the State of Oregon's Department of Administrative Services, (DAS), at <https://www.oregon.gov/das/Procurement/Pages/PayEquity.aspx>, and must certify they have taken the training and provide a certificate as evidence before awarded a

contract by the City.

2.20 SUBCONTRACTORS/SUBCONSULTANTS

In all solicitations either by competitive bidding, proposals, or negotiation made by the successful Proposer for work to be performed under a subconsultant/subcontractor, including procurements of materials or leases of equipment, each potential subconsultant/subcontractor shall be notified by the successful Proposer of the Proposer's obligations under this contract, Title VI of the Civil Rights Act of 1964, and other federal nondiscrimination laws. A list of potential state certified DBE Contractors is available at <https://www.oregon.gov/biz/programs/cobid/pages/default.aspx> and from the City's website at <https://albanyoregon.gov/bids>.

2.21 IDENTICAL PROPOSALS

If the City receives proposals identical in price, fitness, availability, and quality and chooses to award a contract, the City will award the contract in accordance with ORS 279A.120 and OAR 137-046-0300. If the City determines that one or more proposals are identical, tiebreaker preference for identical offers are awarded on the following order of precedence: 1) Goods and services manufactured, produced or to be performed in Oregon, and 2) Drawing of lots among the identical offers. The City will provide the Proposers who submitted the identical proposals notice of the date, time, and location of the drawing of lots and an opportunity for the Proposers to be present when the lots are drawn.

2.22 COMPLIANCE WITH STATE OF OREGON LAWS

By submitting a response to this solicitation, Proposer agrees that any terms and conditions stated within any agreement awarded as a result of this solicitation will include the following laws of the State of Oregon and are hereby incorporated by reference into the agreement: ORS 279B.220 (Payment, contributions, liens, and withholding), ORS 279B.225 (Salvaging, recycling, composting or mulching yard waste material, if applicable), ORS 279B.230 (Payment for medical care and workers' compensation), and ORS 279B.235 (Hours of labor).

2.23 NOTIFICATION OF INTENT TO AWARD AND DEBRIEFING OPPORTUNITY

Responsive Proposers to this RFP will be notified of the Selection Review Committee's recommendation and the City's intent to award an Agreement not less than seven (7) days prior to award of Agreement. The notice of intent to award an agreement will be directed to the person who has signed the proposal on behalf of the Proposer, or their designee, if an email has not been provided.

The City will notify all Proposers of their opportunity to request a debriefing with Procurement to review scores, evaluation, interviews and demonstrations, if applicable, and proposal recommendations for improvement.

2.24 PROTEST OF AWARD

A Proposer whose submittal was scored as the second apparent, most advantageous proposal response, and submitted a responsive and responsible proposal, may protest the award of contract or the intent to award such a contract, whichever occurs first. In addition, the following conditions must exist: (1) the Proposer must be adversely affected because the Proposer would be eligible to be awarded the contract in the event the protest is successful; (2) the reason for the protest is that all the lower proposals, or higher-ranked proposals are nonresponsive; (3) the City has failed to conduct the evaluation of

proposals in accordance with the criteria or processes described in the solicitation document and the specific criteria and process being protested must be included; (4) the City has abused its discretion in rejecting the protestor's bid/proposal as nonresponsive; (5) the City's evaluation of the proposals or the subsequent determination of award is otherwise in violation of ORS 279A or 279B.

Written protests must be delivered to the Contracts and Procurement Officer at procurement@albanyoregon.gov, within seven (7) days after issuance of the notice of intent to award the contract, or if no notice of intent to award is issued, within forty-eight hours after award. The written protest must specify the grounds for protest, must be received by the deadline provided in the notice of intent to award, and must be complete meeting all conditions addressed above, to be considered by the City, pursuant to ORS 279B.410(2). City will not consider a protest of contract award that is incomplete or submitted after the above timeline.

2.25 NONAPPROPRIATION

The City's obligation to award this RFP is contingent upon appropriation or approval of funds.

2.26 AGREEMENT

The Successful Proposer will be required to sign an Agreement to deliver to the City at the cost proposed, providing the scope of services and conditions set forth herein, or an agreed upon statement of work, if applicable. It is the City's intent to award an Agreement in substantially the form of the Sample Agreement attached to this RFP document. Proposers may submit alternatives to the Agreement for the City's review. The City, at its sole determination, may approve the Proposer's offered terms, as is, require modifications, or reject the proposed Agreement terms and conditions and require the City's Agreement be executed for the purpose of this RFP.

2.27 NOTICE TO PROCEED

Work under the Agreement may not begin until the Notice to Proceed has been issued. The City will issue the Notice to Proceed after execution of the contract. The Notice to Proceed will state the date work under the Agreement will begin.

2.28 INDEPENDENT CONTRACTOR (ORS 670.600)

The Proposer shall provide all labor, equipment, material, and supervision necessary to perform the scope of services described in this RFP. The parties intend that Proposer, in performing the services specified in this contract, shall act as an Independent Contractor, and shall have control of the work and the manner in which it is performed. Proposer is not considered an agent or employee of the City of Albany and is not entitled to participate in any pension plan, insurance, bonus, or similar benefits the City of Albany provides its employees.

2.29 RECIPROCAL PREFERENCE LAW

Oregon's Reciprocal Preference Law, ORS 279A.125, requires public contracting agencies, in determining the lowest responsible Proposer, to add a percent increase to each out-of-state Proposer's proposal price which is equal to the percent of preference given to local Proposers in the Proposer's home state. The list prepared and maintained by the Oregon Department of Administrative Services pursuant to ORS 279A.120(4) will be used to determine whether the nonresident Proposer's state gives preference to in-state Proposers and the amount of such preference. For details, check Oregon's

Reciprocal Preference Law at <https://www.naspo.org/reciprocity1>. Proposers in need of assistance in the application of this law should contact the State Procurement Office: State of Oregon, Department of Administrative Services, State Procurement Office, 1225 Ferry Street SE, U-140, Salem, OR 97301-4285. Phone: 503-378-4642.

2.30 INVOICES

All invoices must be submitted, in writing and given by mail or email to:

City of Albany
Attn: Accounts Payable
P.O. Box 490, Albany, Oregon 97321
Accountspayable@albanyoregon.gov

And when so addressed, will be deemed given upon deposit in the United States mail, postage prepaid. In all other instances, bills will be deemed given at the time of actual delivery.

2.31 INTERGOVERNMENTAL COOPERATIVE AGREEMENT

Pursuant to ORS 279A.215, other Public Agencies shall have the ability to purchase the awarded goods and/or services from the awarded Firm under terms and conditions of the resultant contract. Any such purchases shall be between the Firm and the Participating Public Agency and shall not impact the Firm's obligation to the City of Albany. If the Firm chooses to participate in such agreements, all Agency relationships including those for contract administration, ordering, deliveries, approvals, billing, and collections shall be between the Participating Agency and the Firm. The originating agency, City of Albany, except for this enabling agreement, shall not participate in any aspects of commercial activity between the Firm and the Participating Agency. If the Firm agrees to participate, all such participation shall be on the basis of this solicitation and the resulting award except that reasonable changes in pricing and terms may be negotiated directly between the Participating Agency and the Firm to accommodate differences in delivery distances and local conditions. All such changes shall be solely between the Firm and the Participating Agency.

Proposer must accept or decline participation in the Cooperative Agreement by providing written notification on the Proposal Certification form.

SECTION 3 – SCOPE OF WORK

3.1 PROJECT DESCRIPTION AND OBJECTIVE

The City's current contract for risk management and insurance brokerage consulting services will expire June 30, 2024. The firm chosen shall be a certified City/County Insurance Services Risk Management Advisor and shall demonstrate competency and experience providing high quality services at a competitive price.

The objective is to contract with a firm that can provide assistance with the annual renewal specifications for property, liability, workers' compensation, and crime coverage insurance and assist staff with risk management issues and preparation of the annual risk management report; provide guidance regarding review of insurance certificates and contract risk exposure, and assist staff with the development of standard insurance language and hold harmless provisions for contracts and agreements.

3.2 CONTRACT TERM

This contract will be for a period of five (5) years, commencing July 1, 2024, through June 30, 2029, with an option to extend the contract for two (2) additional one-year terms. If the City elects to renew the contract, a written notice shall be provided a minimum of forty-five (45) days prior to the expiration of the current contract of its intent to do so. Contract extensions will be on the same terms as the original agreement, subject to economic price adjustments.

Proposer shall begin work within seven (7) days after the notice to proceed has been issued or on the agreed upon project start date.

3.3 QUALIFICATIONS AND CERTIFICATIONS REQUIRED

Proposer shall meet the following minimum qualifications:

- Be knowledgeable with all federal and state of Oregon laws.
- Comply with all Oregon laws and practices, as well as ordinances, resolutions, and policies of the City of Albany.
- Be experienced providing risk management and insurance brokerage consulting services to Oregon municipalities, large and small, and component entities in Oregon.
- Be a certified City/County Insurance Services Risk Management Advisor.

3.4 SCOPE OF SERVICES

I. RISK ANALYSIS

- (i) Prepare annual reports to the City providing a complete insurance schedule, annual and cumulative loss histories.
- (ii) Assist City staff in updating and maintaining the City's Risk Management Policy.
- (iii) Assist City staff in preparing the Risk Management Annual Report each fiscal year.

- (iv) Based on the above evaluation, review the entire insurance program and make recommendations.
- (v) Assist with the implementation of risk elimination and transfer alternatives approved by the City. This includes, but is not limited to, attending Citywide Safety Committee Meetings.
- (vi) Respond to audit findings (**financial, risk management, or safety related**), if any, offering recommendations for either compliance or alternatives.

II. INSURANCE ADMINISTRATION

- (i) Assist the City's Finance Manager, or designee, with all claims and losses, including expediting settlements of first-party losses covered by insurance; review procedures, reserves, and settlements of third-party claims; and maintain records of all City claims.
- (ii) Assist City staff in updating and reporting to the insurance carrier any changes in their property, scheduled equipment, and automobile insurance schedules.
- (iii) Assist in all areas of accounting for risk management costs, which includes:
 - a. Allocating costs by operational divisions, and
 - b. Checking and reviewing all rates.
- (iv) Annually review contract language relative to risk management, including insurance policies, contractual agreements, and "Hold Harmless" clauses in leases or other City contracts, including procurement contracts and the associated insurance requirements; this would include the custom design of insurance policies when appropriate.
- (v) Assist City staff in preparing renewal specifications for property, liability, workers' compensation, and crime coverage on an annual basis. This includes a review of optional deductible, liability limits and a written review of market conditions and price comparisons of coverage specifications.

III. FINANCIAL ANALYSIS

- (i) Provide budget planning estimates for insurance premiums and self-insurance fund administration.
- (ii) Provide a cost-benefit analysis for any changes in insurance coverage or reallocation of risk management funds.
- (iii) Provide a premium allocation report to distribute the City insurance premiums, excluding employee benefits, on a loss sensitive basis by department by January each year to assist with budget planning and preparation.

IV. GENERAL RISK MANAGEMENT SERVICES

- (i) Advise the City of the various bids for insurance coverage and offer recommendations.
- (ii) Respond in a timely manner to requests and questions from the City's Finance Manager or designee(s). All City inquiries will be handled by the finance department as the sole contact for record-keeping and accounting purposes. Additional requests by the public works department must include copied notification to the applicable finance department staff for record keeping purposes.
- (iii) Advise the City of developments in the insurance market; rate, value, and other cost trends; indications of any problems emerging in the account; and other facts which might affect the City's risk management program.
- (iv) Review with City staff and legal counsel the appropriate property, liability, automobile, and workers' compensation claim reporting procedures.
- (v) Schedule quarterly meetings with City staff to review claim history and make risk management recommendations based on loss trends.

V. OTHER GENERAL SERVICES

- (i) Provide the City two hours of training with City department m Managers and supervisors on risk management issues as agreed upon by the City's finance and human resources departments.
- (ii) Meet with City staff to explain insurance procedures and coverage.
- (iii) Attend City Council meetings when requested.
- (iv) Review legislative activities and advise City staff concerning the effects of legislative changes on insurance coverage and costs.
- (v) Advise the City of other services available from agencies or insurance companies.
- (vi) Establish and maintain an effective working relationship with City staff.
- (vii) Provide professional advice on a specific project basis and general consultation on public property and contracting matters, as needed.
- (viii) Provide an annual listing of commissions received representative of the types of insurance policies listed below. **Insurance Coverage Declarations purchased by the City are provided in the Appendices including a Summary of all Coverages.**

Airport – ACE Property and Casualty

Drone – USAIG – pending coverage

Property - Boiler & Machinery - CIS

Earthquake & Excess – CIS

Flood & Excess – CIS

Excess Crime – CIS

Tort Liability – CIS
Auto Liability – CIS
Auto Physical Damage – CIS
Cyber/Excess Cyber Liability – CIS
Volunteer Accident – CIMA/QBE
Workers' Compensation - SAIF

3.6 CITY RESPONSIBILITIES

The selected Proposer will coordinate with the City to implement the work schedule and scope of work. Any work to be subcontracted shall be communicated and agreed to by the City in advance.

Proposals should reflect a coordinated approach and Proposer should specify the type and level of support anticipated from City staff. The City will do its utmost to provide a timely response regarding issues and questions that may arise. The City will reserve the right to initiate conferences with the Proposer to review Work at any time.

The City shall conduct a Kickoff Meeting with the Successful Proposer within 10 days after the notice to proceed or the start of the contract term to review the Work expectations and schedule.

3.7 CONTRACTOR'S EMPLOYEES AND SUBCONTRACTORS

The selected Proposer will utilize employees who can perform the work described in the RFP scope of services and must wear or provide identification so individual is readily identifiable as an employee of the Proposer when conducting business at the City of Albany. Proposer' employees shall not represent to anyone they are an employee of the City of Albany. The Proposer must comply with all City required Oregon Health Authority (OHA) guidelines and OSHA restrictions while providing any onsite services.

The City and the Proposer will promptly notify the other of any complaints received within 24 hours, and at the request of the City, shall promptly replace any employee, or subcontractor, should a situation arise, that cannot be remedied.

3.8 KEY PERSONNEL

The Proposer shall acknowledge and agree that if selected, the Proposer is entering into this contract because of the special qualifications of the Proposer's key personnel. In this contract the City is engaging the expertise, experience, judgment, and personal attention of key personnel. The Proposer shall not reassign or transfer the key personnel to other duties or positions without notifying the City. In the event a replacement of key personnel is necessary, the replacement must be acceptable to the City Representatives. Proposer will provide City with key personnel who have experience with the Proposer's company and services.

3.9 CITY REPRESENTATIVES

The City's Representatives shall have full authority to act on behalf of the City with respect to administration of the provisions of this Contract, including the authority to stop the work whenever such stoppage may be necessary to ensure the proper execution of the contract, and shall have authority to reject all work that does not conform to the contract documents. The City's

Representatives are Jeanna Yeager, Finance Director, jeanna.yeager@albanyoregon.gov, and Casey Headley, Finance Manager, casey.headley@albanyoregon.gov.

Upon contract implementation and acceptance, the City Representative or designee will oversee payment reconciliation and contract oversight. The City's Representative shall observe, monitor, and inspect the work to the extent required to determine the provisions of the contract are being properly fulfilled. The inspection of the work completed shall not relieve the Proposer of his/her obligation to perform acceptable work in conformance with these contract documents.

3.10 INCREASE OR DECREASE IN SERVICES

The City may request the Proposer to provide additional work and perform special projects for the City. Because of variations in the demand for additional services from time to time, such work shall be agreed upon in advance, contracted for, provided, and billed separately to the City on a pre-arranged basis.

The City shall have the option to increase or decrease services and may request Proposer to provide additional work and perform special projects for the City. All change orders to the contract will be negotiated, in the form of an amendment to the contract, and mutually agreed upon.

The amendment will represent a proportional adjustment to the contract price resulting from the increase or decrease in the scope of work. The amendment shall be executed by both parties.

3.11 FIXED PRICE CONTRACT WITH ECONOMIC PRICE ADJUSTMENTS

The resulting contract will be a fixed price contract with an economic price adjustment once annually at the request of the Proposer. Any change in pricing will be subject to a maximum increase in any one year for the period ending three (3) months prior to the first day of the contract term, or three (3) percent, whichever is lower, as posted in the U.S. Labor Statistics CPI-W, All Items, <https://bls.gov/cpi/latest-numbers.htm>.

In times of extreme and unforeseen market volatility, the City may negotiate "temporary" price adjustments with the Proposer. As a result of the unexpected cost increases, the City reserves the right to annually request an equitable reciprocal adjustment to pricing should prices trend downward.

Proposer shall be required to provide the driving cost component in the price increase request and will be required to provide supporting evidence on the basis of the increase, such as rates reflected on the PPI or CPI, and the Proposer's cost data.

SECTION 4 – PROPOSAL SUBMITTAL REQUIREMENTS

4.1 SUBMITTAL PROCESS

Each proposal must include, at a minimum, the items listed in the Scope of Work and the Proposer's Submittal Checklist. The proposal must contain the mandatory submittal requirements listed below. Incomplete proposals may be considered nonresponsive. A completeness check will be conducted for each proposal.

Failure to complete any question or request for information, in whole or in part, or any deliberate attempt by the Proposer to mislead the City may disqualify the Proposer. Joint proposals will not be accepted. Proposals that merely offer to provide services as stated in this RFP will be considered non-responsive.

4.2 PROPOSAL FORMAT

Proposals must address all submission requirements set forth in this RFP and must describe how the services will be provided. Proposals should be prepared and submitted in non-editable pdf format and labeled to match those sections in the RFP and with all pages numbered and the Cost Proposal should be submitted as a separate PDF.

The proposal should be prepared succinctly, providing a straightforward, concise description of the Proposer's ability to meet all requirements of the RFP. There should be no unnecessary attachments or exhibits. The City reserves the right to reject proposals that are deemed illegible or too difficult to read. A copy of the proposal Response should be submitted as a separate pdf in a redacted form for dispersal should a record request be received.

4.3 PROPOSER REPRESENTATIONS

Before submitting a proposal, the Proposer must examine the scope of services and conditions thoroughly; provide for appropriate insurance, deposits, and bonds, if required; comply fully with the scope of services for the agreed contract; and ensure any and all registration and certification requirements are met as set forth and required in the Oregon Revised Statutes and this RFP.

4.4 JOINT PROPOSALS

If Proposer is a partnership or joint venture, information must be provided for each partner or joint ventures, and each partner or joint ventures must sign the proposal and any contracts on behalf of both it and the Proposer, and each will be jointly and severally liable. In the case of a legal partnership or joint venture, a written Memorandum of Understanding between the parties must be submitted with the proposal setting forth the business and service delivery agreements between the parties.

4.5 PROPOSAL REQUIREMENTS

Each Proposer must provide a clear understanding of the work to be performed as described in Section 3 and demonstrated by the comprehensiveness and appropriateness of the proposal and provide specific qualifications of prior work experience within a governmental environment.

4.6 PROPOSAL CONTENT – MANDATORY SUBMITTAL REQUIREMENTS

4.6.1 Cover Page

Include the following information on the cover page:

- RFP title.
- Name, title, address, telephone number, fax number, email address of Proposer's primary contact person.
- Date of submission.

In addition to the above information, but not in lieu thereof, Proposers may include other information on the cover page.

4.6.2 Table of Contents

- Include a Table of Contents with the submitted proposal. All material items comprising the proposal should be clearly identified and easily located.

4.6.3 Transmittal Letter

- Include a Transmittal Letter with the proposal, not exceeding two pages in length.
- Identify by name and contact information the person Proposer wishes the City to contact after proposals have been evaluated, scored and ranked.
- Summarize the key points of the proposal and provide an interest and willingness to enter into a contract with the City.
- Include a statement that the Proposer agrees to perform all work outlined in the RFP.
- Name of person(s) authorized to represent the Proposer in any negotiations and the name and title of the person(s) legally authorized to sign any contract that may result.
- List any exceptions to the City's Standard Terms and Conditions Agreement and if the Proposer is exempt from workers' compensation insurance.
- Provide evidence of insurance by submitting a certificate of insurance meeting the City insurance requirements.

4.6.4 Disclosure Statement

- Provide a statement disclosing whether the Proposer or any of its staff assigned to this contract have been sued or have been subject to professional discipline in connection with providing products and/or services for any client, or any related services. If such lawsuits or disciplinary actions have occurred, summarize the allegations, when they occurred, and indicate the outcome of the proceedings.
- Provide a statement regarding any litigation Proposer's company has been involved in where an adverse decision may have resulted in a material change to Proposer's financial position of future viability.

4.6.5 Management Letter & Financial Strength

- Include full legal name, any and all company names previously used, including DBA, if applicable, and the location of the company headquarters and include if there is a local office.
- Provide a history of the firm, the total number of years the firm has been in business, the general scope of services the firm provides, the current number of employees, and the current principal areas of expertise.
- Identify key competitors and reasons why the company should be considered over its competitors.
- Indicate your Firm's approximate annual property/casualty premium volume from public entities.
- Identify the property and casualty markets that currently write governmental risks and are available to your agency.
 - Indicate and describe if any of your markets guarantee rates for multiple years.
 - Evaluate the accessibility and stability of your markets given the present market conditions.
- Describe any future growth plans.

4.6.6 Experience & Qualifications

- Provide a detailed statement of the Firm's experience and qualifications providing similar services in complexity and duration, describe the work, the jurisdiction in which the work occurred, performance history and demonstration of high-quality service. Include experience in Oregon providing services to local and state government and regional entities.
- Provide a list of the principals to be assigned to the City together with a statement of their expertise, professional licensing, and certifications.
- Identify the nature of the work each individual will perform and include resumes.
- State their expertise including risk management consulting, particularly with self-insured public entities with exposures similar to the City of Albany.
- Other than those persons, indicate who will be directly responsible for the City's account, and indicate other service representatives who will be available to assist City staff.
- Provide an organizational chart detailing the responsibilities and experience of the officers and key support personnel.
- Describe how the Proposer will provide continuity of services to the City with the proposed key personnel.
- Indicate if there are specialty areas that will be outsourced to subcontractors. If subcontracting is proposed, the subcontractor must be identified, and their qualifications and experience must be presented.
- Describe the assistance your Firm can provide in estimating real and personal property values.

4.6.7 Project Understanding and Approach

- Describe your understanding of the nature of this engagement and present a viable approach to achieve it. Include your approach to working with your client (Council, staff, and City committees) and the reports you provide clients (provide a sample report).
- Demonstrate your philosophy on Risk Management.
- Describe the cost saving methods you would recommend improving a government agency's exposure rating, mitigate risk, and reduce workers' compensation claims.
- Describe how the Proposer and employees will effectively communicate and collaborate with City staff. Include the responsibilities of the Firm and the Firm's expectations of what the City would provide.
- Describe the method you would use to secure competitive premium quotes for the City's insurance program.
- Describe what services you believe should be performed by the Proposer for an account like the City's. Describe what consulting services are available for property/casualty, workers' compensation, risk management, loss control and environmental exposures.
- List and describe the significant issues and concerns that need to be addressed for successful service delivery.
- Describe a situation where it was necessary for the Proposer to strongly advise a government agency to incorporate a change to the agency's policies and/or procedures, the method used to communicate the recommendations, and how the situation was resolved in a favorable manner to all parties.

4.6.8 Cost Proposal

- **Submit a complete estimated annual Cost Proposal using Exhibit A as a separate PDF. Include itemization if needed.**
- **If additional services are required and requested, include an hourly rate.**
- **Contractor shall make a statement and disclose percentage-based fee(s) received, state what is included in the fee, and identify which policies they will receive a carrier commission on. This will not be scored.**
- Cost will be evaluated in accordance with a quantitative approach.
- Scoring shall be based upon the percentage of the proposed cost as compared to the lowest Proposer's cost using the following formula: $\text{*lowest cost of all Proposers} \times \text{cost points possible} = \text{cost score*}$

4.6.9 References

- Provide four (4) references from customers, including government agencies and preferably Oregon municipalities, for whom the Proposer is currently or has previously provided similar services as defined in this RFP, within the last three (3) years. Include the contact names, phone number, email, and mailing address on Exhibit B.

- References must clearly demonstrate the type of services provided to current or past customers and the length of service.
- References may be contacted to assist with the evaluation of experience, qualifications, and customer satisfaction and should be available to offer adequate information if contacted by the City.
- Additional references may be contacted by the City at its discretion. Customers must be satisfied with the level of expertise and qualifications of the Proposer.

4.7 EXHIBITS REQUIRED

- a. Cost Proposal (Exhibit A)
- b. References (Exhibit B)
- c. Proposal Certification (Exhibit C)
- d. Certification for Corporation or Independent Contractor (Exhibit D)
- e. Responsibility Certification (Exhibit E)
- f. Insurance Requirements (Exhibit F)

SECTION 5 – EVALUATION CRITERIA AND CONTRACT AWARD

5.1 SELECTION PROCESS

The process to select a Contractor will consist of a solicitation of proposals from all Proposers interested in providing the required services described in this RFP. Proposers shall meet the requirements and demonstrate the necessary experience and professional qualifications to complete the project with the essential staff on time and within budget in an efficient and cost-effective manner.

The City reserves the right to reject any or all proposals and is not liable for any costs the Proposer incurs while preparing the proposal. All proposals will become part of the public file, without obligation to the City. Upon completion of the evaluations, the City intends to negotiate a contract with the Proposer whose proposal best meets the City's expectations for providing the highest quality of services at a cost representing the best value to the City.

5.2 SELECTION REVIEW TEAM

The Selection Review Team will be comprised of a minimum of three members. The role of the Selection Review Committee is to evaluate the proposals submitted and make a recommendation for an award. The City may seek expert advice to help review proposals. Such advisors to the Selection Review Committee may attend evaluation meetings and Proposer interviews, if applicable, and lend any such expertise to the process as requested. However, any such person contacted by the City for their expert advice shall not, from first being contacted until the RFP process is completed, have communications with any Proposers regarding their proposals or the process.

Proposals must provide a concise description of the Proposer's ability to satisfy the requirements of the RFP with emphasis on completeness and clarity of content. The City is seeking value from the service requested. If additional information is deemed necessary as part of the evaluations, such information will be solicited to allow the Committee to complete the evaluation process.

5.3 EVALUATION CRITERIA

The criteria listed below will be used to evaluate the proposal response to determine the Apparent Successful Proposer. Scoring will be completed covering all areas listed below in the Evaluation Criteria, the requirements listed in the Scope of Work, Section 3, and the submittal requirements in Sections 4.6 and 4.7. All scores for each Proposer shall be added together to arrive at a final score for each Proposer. Proposals will then be ranked in descending order by the total proposal score.

5.4 EVALUATION CRITERIA SCORE GRID

The criteria listed below will be used to score proposals to determine the Apparent Successful Proposer. Total possible points will be ~~125~~. 130 Points will be weighted as follows:

Evaluation Criteria	
Cover Page	P/F
Table of Contents	P/F
Transmittal Letter	P/F
Disclosure Statement	P/F
Management Letter & Financial Strength	10
Experience & Qualifications	40
Project Understanding and Approach	40
Cost Proposal (Exhibit A)	25
References (Exhibit B)	15
Total Possible Points Available	125 -130

5.5 OPTIONAL INTERVIEWS

At the City's option, interviews may be conducted with all or a select few of the Proposers after the proposals are evaluated. The Selection Review Committee may interview the Proposers and ask additional questions related to the proposal and the scope of work. The City will schedule interviews, if required, on the dates indicated in the RFP Schedule, but may be revised if needed. Interviews will take place at a location to be determined in Albany or may be conducted remotely.

Proposers invited to the interview will be responsible for making and paying for their own travel arrangements, if applicable. If held, a possible 30 points may be attributed to interviews. A set of questions may be provided to the selected Proposers prior to the interview date at the City's discretion.

5.6 RANKING OF PROPOSALS AND SELECTION

Proposals may be ranked by the Selection Review Committee based on evaluation of responses and interviews (if any), with the first-ranked Proposer being that Proposer who is deemed to be the most appropriate and fully capable to perform the services, and the second-ranked Proposer being the next most appropriate, all in the sole judgment of the Selection Review Committee.

Contractor's scores will be totaled and ranked. Any Proposer's response to this RFP will be considered de facto permission to the City of Albany to disclose the results, when completed, to selected viewers at the sole discretion of the City of Albany.

5.7 NEGOTIATIONS

The City may commence serial negotiations with the highest ranked, eligible Proposers or commence simultaneous negotiations with all eligible Proposers. The City may negotiate: (a) the statement of work; (b) the contract price as it is affected by negotiating the statement of work; and, (c) any other terms and conditions reasonably related to and expressly authorized for negotiation in the RFP or addenda thereto, or alternative terms and conditions that are reasonable and declared by Proposer within their proposal response to be considered for negotiation.

5.8 BEST AND FINAL OFFERS

If in the best interest of the City it has chosen to employ a method of Proposer selection leading to best and final offers, the City may conduct private discussions with qualified Proposers as allowed by ORS 279B.060(6).

5.9 CONTRACT AWARD

The award of a contract is accomplished by executing a contract with a written agreement that incorporates the entire RFP, attachments, exhibits, Proposer's response, clarifications, addenda, and statement of work. All such materials constitute the Contract Documents. The Issuing Office is the sole point of contact for the issuance and compliance of the contract and insurance. The contract shall be substantially in the form of the sample Standard Terms and Conditions Agreement, Attachment A.

The Proposer must indicate a willingness to negotiate a contract in a timely, reasonable manner with the City. The contractual agreement must be fully negotiated within 21 days of the Notice of Award. The City reserves the right to negotiate with the second-ranked Proposer if the contract negotiation attempts are unsuccessful with the Apparent Successful Proposer.

5.10 INSURANCE REQUIREMENTS

The successful Proposer must be covered by commercial general liability, automobile liability, and professional liability insurance. Proposer must be covered by workers' compensation insurance which will extend to and include work in Oregon unless Proposer is exempt from workers' compensation under ORS 656.126. Proposer shall indicate exemptions, if any, to workers' compensation within the Transmittal Letter.

Proposer must provide evidence of insurance and certify that Proposer will meet the City insurance requirements as defined in the RFP if awarded a contract. Proposer must provide a Certificate of Insurance reflecting the insurance requirements within seven (7) days of the Notice of Award. If Proposer does not provide the required insurances, the City may elect to negotiate a contract with the second-ranked Proposer.

EXHIBIT A – COST PROPOSAL – REVISED 4-22-24

I hereby certify that the undersigned is authorized to represent the firm stated below, and empowered to submit this proposal and if selected, agrees to furnish all services in accordance with the RFP and addenda. In addition, all City of Albany project requirements, including insurance, and bonds (if applicable), have been reviewed and are incorporated in this Cost Proposal.

Firm Name: _____ Phone: _____ Fax: _____

Address: _____ City: _____ State: ____ Zip: _____

Name (please print) _____ Tax ID No.: _____

Signature: _____ Title: _____

Date: _____ Email: _____

EXHIBIT B - REFERENCES

Provide complete references with telephone numbers and email below. References must be able to verify the quality of your previous work in the proposed area of work. Add additional pages if needed.

REFERENCE 1

Organization Name

Phone

Contact Person

Email (needed for reference checks)

Address

Contract Term

City, State, Zip

Project Description:

REFERENCE 2

Organization Name

Phone

Contact Person

Email (needed for reference checks)

Address

Contract Term

City, State, Zip

Project Description:

REFERENCE 3

Organization Name

Phone

Contact Person

Email (needed for reference checks)

Address

Contract Term

City, State, Zip

Project Description:

REFERENCE 4

Organization Name

Phone

Contact Person

Email (needed for reference checks)

Address

Contract Term

City, State, Zip

Project Description:

EXHIBIT C – PROPOSAL CERTIFICATION

The undersigned hereby proposes and if selected agrees to furnish the equipment and services described herein in accordance with the RFP, exhibits, attachments, and addenda, if applicable, for the term of the Agreement and certifies that the Proposer is not in any way involved in collusion and has no known actual or apparent conflict of interest in submitting a proposal.

Certifications

Non-Collusion The undersigned Proposer hereby certifies that it, its officers, partners, owners, providers, representatives, employees and parties in interest, including the affiant, has not in any way colluded, conspired, connived or agreed, directly or indirectly, with any other Proposer, potential Proposer, firm or person, in connection with this solicitation, to submit a collusive or sham bid, to refrain from bidding, to manipulate or ascertain the price(s) of other Proposers or potential Proposers, or to secure through any unlawful act an advantage over other Proposers or the City. The fees, prices, and Response submitted herein have been arrived at in an entirely independent and lawful manner by the Proposer without consultation with other Proposers or potential Proposers or foreknowledge of the prices or Responses to be submitted in response to this solicitation by other Proposers or potential Proposers on the part of the Proposer, its officers, partners, owners, providers, representatives, employees, or parties in interest, including the affiant.

Discrimination The undersigned has not discriminated and will not discriminate against any minority, women, or emerging small business enterprise or against a business enterprise that is owned or controlled by or that employs a disabled veteran in obtaining a required subcontract.

Conflict of Interest The undersigned Proposer and each person signing on behalf of the Proposer certifies they do not have a personal or organizational conflict of interest. Proposer certifies they have not participated in drafting the scope of work or writing specifications required for the project.

In the case of a sole proprietorship, partnership, or corporation, each party thereto certifies as to its own organization, under penalty of perjury, that to the best of their knowledge and belief, no member of the City Council, officer, employee, or person, whose salary is payable in whole or in part by the City, has a direct or indirect financial interest in the award of this Response, or in the services to which this Response relates, or in any of the profits, real or potential, thereof, except as noted otherwise herein.

Work Furnished The undersigned hereby submits this Response to furnish all work, services, systems, materials, equipment, and labor as indicated herein, and agrees to be bound by all related contract documents.

Public Record Proposer agrees that proposal may be released in total as public information in accordance with the requirements of the laws covering the same. Any proprietary information has been clearly marked.

Indicate if Redaction is Required: Yes No

Federal Funding Requirements (2 CFR 200.327) (if applicable) Proposer certifies they can meet & abide by all applicable contract provisions required in *Appendix II to Part 200 - Contract Provisions for Contracts under Federal Awards*. Yes No **(NOT APPLICABLE)**

Disadvantaged Business Enterprises (DBE): Yes No **Type of DBE** _____

Reciprocal Preference Law – Residency: Resident Bidder (Oregon) Non-Resident Bidder

Addenda Acknowledgement- No(s). ___ Dated ___ No(s). ___ Dated ___ No(s). ___ Dated ___ No(s) ___ Dated: ___

Intergovernmental Cooperative Procurement - Acceptance: Yes No

Signature Block

The undersigned hereby certifies that the information contained in these certifications and representations is accurate, complete, and current.

Name/Title

Telephone Number

Mailing Address, City, State, Zip

Tax Identification No.

Fax Number

Email Address

Signature

Date

EXHIBIT D – CERTIFICATION FOR CORPORATION OR INDEPENDENT CONTRACTOR

A. Contractor is a Corporation, Limited Liability Company, or a Partnership

I certify under penalty of perjury that Contractor is a (check one):

- Corporation Limited Liability Company Partnership Nonprofit Corporation
authorized to do business
in the State of Oregon

Signature: _____

Title: _____ Date _____

B. Contractor is a Sole Proprietor Working as an Independent Contractor

Contractor certifies under penalty of perjury, that the following statements are true:

1. If Contractor is providing services under this Contract for which registration is required under ORS Chapter 71 (Architects and Landscape Contractors) or 701 (Construction Contractors), Contractor has registered as required by law.
2. Contractor is free to determine and exercise control over the means and manner of providing the service subject to the right of the City to specify the desired results.
3. Contractor is responsible for obtaining all licenses or certifications necessary to provide the services.
4. Contractor is customarily engaged in providing services as an independent business.
5. Contractor is customarily engaged as an Independent Contractor if at least three of the following statements are true.

C. Independent Contractor

You must check at least three to establish that you are an Independent Contractor.

- A. Contractor's services are primarily carried out at a location that is separate from Contractor's residence or primarily carried out in a specific portion of the residence which is set aside as the location of the business.
- B. Contractor bears the risk of loss related to the services provided under this Contract.
- C. Contractor provides services to two or more persons within a 12-month period or Contractor routinely engages in business advertising solicitation or other marketing efforts reasonably calculated to obtain new contracts for similar services.
- D. Contractor makes a significant financial investment in the business.
- E. Contractor has the authority to hire additional persons to provide the services and to fire such persons.

Signature: _____

Name/Title: _____ Date: _____

EXHIBIT E – RESPONSIBILITY CERTIFICATION

Failure to complete and sign this form may result in the rejection of the submitted offer. The Proposer will notify Procurement within 30 days of any change in the information provided on this form. Proposer must check all applicable boxes to reflect compliance.

The Proposer certifies to the best of its knowledge and belief that neither it nor any of its principals:

- Are presently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from submitting bids or proposals by and federal, state, or local entity, department or agency;
- Have within a five-year period preceding the date of this certification been convicted of fraud or any other criminal offense in connection with obtaining, attempting to obtain, or performing a public (federal, state, or local) contract embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
- Are presently indicted for or otherwise criminally charged with commission of any of the offenses enumerated in Paragraph 2 of this certification;
- Have, within a five-year period preceding the date of this certification had a judgment entered against Contractor or its principals arising out of the performance of a public or private contract;
- Have pending in any state or federal court any litigation in which there is a claim against Contractor or any of its principals arising out of the performance of a public or private contract; and
- Have within a five-year period preceding the date of this certification had one or more public contracts (federal, state, or local) terminated for any reason related to contract performance.

The Proposer certifies to the best of its knowledge that:

- Contractor is registered to do business in the State of Oregon.
- Contractor can perform the work as indicated in the RFP for the contract term.
- Contractor has experience with similar projects and had a satisfactory record of performance.
- Contractor has available the appropriate financial, material, equipment, facility and personnel resources and expertise, or can obtain the resources and expertise necessary to meet all contractual responsibilities.
- Contractor has not been debarred or suspended by any federal, state, or local agency; Contractor is not listed on the State of Oregon's Ineligible Contractors list; Contractor is not listed on the SAM Exclusion list (federal funding requirement).

ATTESTATION:

SIGNATURE OF AUTHORIZED PERSON:

(notarization is not required)

Signature: _____ Date: _____

Name/Title _____

Company Name: _____

Phone: _____ Email: _____

EXHIBIT F – INSURANCE REQUIREMENTS

Contractor must at all times maintain in force at Contractor's expense the insurance noted below. Evidence of Insurance shall be provided with Proposal Response. Coverages underlined AND marked with an "X" as "Required" are mandatory.

Workers' Compensation insurance in compliance with ORS 656.017, which requires subject employers to provide workers' compensation coverage in accordance with ORS Chapter 656 or CCB (Construction Contractors Board) for all subject workers. Contractor and all subcontractors of Contractor with one or more employees must have this insurance unless exempt under ORS 656.027. **Employer's Liability Insurance with coverage limits of not less than \$1,000,000 must be included. If Contractor does not have coverage, and claims to be exempt, Contractor must indicate exemption below with qualified reasons for exemption, ORS 656.027.** Out-of-state Contractors with one or more employees working in Oregon in relation to this Contract must have Workers' Compensation coverage from a state with extraterritorial reciprocity, or they must obtain Oregon specific Workers' Compensation coverage ORS 656.126.
 Check this box if Contractor is exempt and provide qualified reason: _____

Professional Liability insurance covering any damages caused by error, omission or any negligent acts of the Contractor, its subcontractors, agents, officers, or employees' performance under this Contract. **Combined single limit per occurrence shall not be less than \$2,000,000. Annual aggregate limit shall not be less than \$2,000,000.** If coverage is on a claims-made basis, then either an extended reporting period of not less than 24 months shall be included in the Professional Liability insurance coverage, or Contractor shall provide **Tail Coverage**.

- If this box is checked, the limits shall be \$1,000,000 per occurrence and \$1,000,000 in annual aggregate.
- If this box is checked, the limits shall be \$2,000,000 per occurrence and \$2,000,000 in annual aggregate.
- Required by City Not Required by City (Needs Finance Insurance Review and Approval.)

Commercial General Liability insurance with coverage satisfactory to the City on an occurrence basis. **Combined single limit shall not be less than \$2,000,000 per occurrence for Bodily Injury and Property Damage and annual aggregate limit for each shall not be less than \$3,000,000.** Coverage may be written in combination with Automobile Liability Insurance (with separate limits). **Annual aggregate must be on a "per project basis"**. A combination of primary and **Excess Liability or an Umbrella insurance policy** may be used to meet the required limits of insurance.

- If this box is checked, the limits shall be \$1,000,000 per occurrence and \$2,000,000 in annual aggregate.
- If this box is checked, the limits shall be \$2,000,000 per occurrence and \$3,000,000 in annual aggregate.
- If this box is checked, the limits shall be \$5,000,000 per occurrence and \$5,000,000 in annual aggregate.
- If this box is checked, the limits shall be \$10,000,000 per occurrence and \$10,000,000 in annual aggregate.
- Required by City Not Required by City (Needs Finance Insurance Review and Approval.)

Automobile Liability covering all owned, non-owned, or hired vehicles. This coverage may be written in combination with the Commercial General Liability insurance (with separate limits). **Combined single limit per occurrence shall not be less than \$2,000,000.** Use of Personal Automobile Liability insurance coverage may be acceptable if evidence that the policy includes a business use endorsement is provided.

- If this box is checked, the limits shall be \$1,000,000 per occurrence.
- If this box is checked, the limits shall be \$2,000,000 per occurrence.
- If this box is checked, the limits shall be \$5,000,000 per occurrence.
- Required by City Not Required by City (Needs Finance Insurance Review and Approval.)

Pollution Liability covering Contractor's or appropriate subcontractor's liability for bodily injury, property damage and environmental damage resulting from sudden accidental and gradual pollution and related cleanup costs incurred by Contractor, all arising out of the Goods delivered or Services (including transportation risk) performed under this Contract is required. If this coverage is on a claims-made basis, the policy must provide a 24-month extended reporting period. **Coverage must have a limit of not less than \$2,000,000 per incident/claim and \$2,000,000 policy annual aggregate.**

- If this box is checked, the limits shall be \$2,000,000 per incident/claim and \$2,000,000 in annual aggregate.
- Required by City Not Required by City (Needs Finance Insurance Review and Approval.)

Cyber Liability - Technology Errors & Omissions & Network Information Security & Privacy Liability for the duration of the contract and for the period of time in which Contractor (Business Associates or subcontractors) maintains, possesses, stores, or has access to City data. **Coverage must include limits of not less than \$5,000,000.**

If this box is checked, the limits shall be \$2,000,000 per occurrence/claim and \$2,000,000 annual aggregate.
 If this box is checked, the limits shall be \$5,000,000 per occurrence/claim and \$5,000,000 annual aggregate.
 Required by City Not Required by City (Needs Finance Insurance Review and Approval.)

Garage Keepers' Legal Liability - Coverage for vehicles, including equipment and contents left in vehicles during unhooking, storage, repairs, maintenance, or safekeeping. **Coverage must include \$500,000 combined single limit per location.**

Required by City Not Required by City (Needs Finance Insurance Review and Approval.)

Garage Liability - Coverage for vehicles driven during storage or safekeeping. **Combined single limit per occurrence shall not be less than \$2,000,000.**

Required by City Not Required by City (Needs Finance Insurance Review and Approval.)

Excess Liability or Umbrella Liability Policy - A combination of primary and Excess Liability or Umbrella Insurance coverage policy may be used to meet the required limits of insurance required by City. Contractor must indicate such on the certificate of insurance or within the endorsements.

Sexual Abuse and Molestation - If coverage is excluded under the Commercial General Liability policy, evidence of separate Sexual Abuse and Molestation coverage is required. **Coverage must be not less than \$1,000,000 per claim, incident or occurrence and \$2,000,000 in the aggregate.**

Required by City Not Required by City (Needs Finance Insurance Review and Approval.)

Coverage must be provided by an insurance company authorized to do business in Oregon or rated by A.M. Best's Insurance Rating of no less than A-VII or City approval. Contractor's coverage will be primary in the event of loss and state the deductible or retention level. Contractor shall provide a current Certificate of Insurance and renewal upon expiration of any of the required coverages. Contractor shall immediately notify the City of any change in insurance coverages.

Deductible or Self-Insured Retention (SIR) - Contractor must provide Bondability letter with Proposal Response should SIR apply to insurance coverage(s), and any deductible or SIR must be declared to and approved by the City before contract award. Contractor is required to procure a Letter of Credit or surety bond guaranteeing payment of losses and related investigations, claim administration, and defense expenses, or reduce or eliminate such deductible or SIR as respects to City, its officers, employees and agents.

Additional Insured - City must be included by name as an Additional Insured by endorsement for any General Liability policy on a primary and non-contributory basis. Such coverage will specifically include products and completed operations coverage.

Description of Operations - Shall state: "Project Name: The City of Albany, its officers, employees, and agents are additional insureds with respect to Contractor's activities to be performed under this Contract. Coverage shall be primary and non-contributory with any other insurance and self-insurance, (include the number). This form is subject to policy terms, conditions, and exclusions." A copy of the endorsement shall be attached to the Certificate of Liability Insurance. Contractor shall provide complete copies of insurance policies if requested by the City.

Certificate Holder - Shall be listed as: City of Albany, P.O. Box 490, Albany, OR 97321.

Insurance Renewals - Certificate(s) of Insurance renewals shall be emailed to City of Albany, Finance Dept., Diane Murzynski, at insurance@albanyoregon.gov.

Proposer certifies that he/she will comply with the City's insurance requirements.

Signature Block:

Signature: _____ Date: _____

Company Name: _____

ATTACHMENT A – *SAMPLE CONTRACT*
STANDARD TERMS AND CONDITIONS
AGREEMENT TO FURNISH INSURANCE AGENT OF RECORD
TO THE CITY OF ALBANY, OREGON

ARTICLE I: SCOPE

For consideration set forth in Article V of this Agreement, the firm of _____, hereinafter referred to as (“CONTRACTOR”), agrees to provide Insurance Agent of Record Services, as defined in the Request for Proposals, for the City of Albany, Oregon, a municipal corporation, hereinafter referred to as (“CITY”).

The contract term shall be for five years, commencing July 1, 2024, and ending June 30, 2029, with an option to extend the contract two additional one-year terms. If CITY elects to renew the contract, a written notice shall be provided a minimum of forty-five (45) calendar days prior to the expiration of the current contract of its intent to do so.

This Agreement incorporates all these Standard Terms and Conditions, the promises, representations, and obligations set forth in the following Order of Precedence: contract amendments, City Standard Terms and Conditions, statement of work, addenda and clarifications, request for proposals, including exhibits, attachments, and appendices, and Proposer’s response.

CITY will assist CONTRACTOR by providing any and all information within its possession or control that may be reasonably helpful in the performance of the services provided herein. In the event of a conflict between the attachment(s) and this document, the terms of this document will control. Unless modified in writing as set forth in Article IV by the parties hereto, the duties of CONTRACTOR and CITY will not be construed to exceed those services and duties specifically set forth in this Agreement.

In consideration of the mutual promises contained herein, it is agreed to as follows, and is effective upon its execution by and between both parties hereto.

ARTICLE II: RESPONSIBILITIES OF CONTRACTOR

- A. Notice to Proceed. CONTRACTOR will not begin work on any of the duties and services listed in Article I until execution of the contract and receipt of a Notice to Proceed from City. Authorization to proceed with additional services not defined in Article I will be in the form of an amendment as defined in Article IV.
- B. Scope of Service. CONTRACTOR agrees to provide professional services as defined in the RFP, Proposer’s Response, and Statement of Work, if applicable, to the satisfaction of CITY.
- C. Level of Competence. CONTRACTOR will provide services with the degree of skill and diligence normally employed by professionals performing the same or similar services at the time the services are performed and for the professional and technical adequacy and accuracy of designs, drawings, specifications, documents, if applicable, and other work products furnished under this agreement. CONTRACTOR must, at all times during the term of this

Agreement, be duly licensed to perform the Work, and if there is no licensing requirement for the profession or Work, be duly qualified and competent. CONTRACTOR will demonstrate the ability to meet or exceed all federal, state, and local laws, codes, and regulations.

- D. Key Personnel. _____ will serve as the lead CONTRACTOR to CITY for the personal services described under the terms of this Agreement. Any change in the designation of this role must be approved by CITY.
- E. Documents/Work Products Produced. CONTRACTOR agrees that all documents and work products produced by CONTRACTOR in the fulfillment of its obligations under this Agreement, and all information, documents and material, gathered or compiled in meeting those obligations, will be considered property of CITY, with an unlimited, royalty free license for CITY use, and will be provided to CITY upon completion of this Agreement or termination of the Agreement pursuant to Article XI.
- F. Compliance with Law. CONTRACTOR covenants and agrees to comply with all of the obligations and conditions applicable to public contracts of this type pursuant to ORS Chapter 279 A and B as though each obligation or condition were fully set forth herein. In addition, CONTRACTOR covenants and agrees that in the performance of its duties hereunder, it will comply with all other state and federal requirements applicable to contracts of this type. If any provision of this Agreement will be deemed to be not in compliance with any statute or rule of law, such provision will be deemed modified to ensure compliance with said statute or rule of law.
- G. Oregon Workers' Compensation Law. CONTRACTOR, its subcontractors, if any, and all employers working under this Agreement are subject employers under the Oregon Workers' Compensation Law and must comply with ORS 656.017, which requires them to provide workers' compensation coverage for all their subject workers unless such employers are exempt under ORS 656.126. CONTRACTOR must ensure that each of its subcontractors, if applicable, complies with these requirements.
- H. Record Retention and Review. CONTRACTOR must maintain books, records, documents and other evidence of accounting procedures and practices which sufficiently and properly reflect all direct costs of any nature expended in the performance of this Agreement. These records will be subject during regular business hours of CONTRACTOR to inspection, review, or audit by personnel duly authorized by CITY upon reasonable advance written notice from CITY to CONTRACTOR. CONTRACTOR will retain all records related to this Agreement for six (6) years following the date of final payment or completion of any required audit, whichever is earlier, and make them available for inspection by persons authorized under this provision. CONTRACTOR will be responsible for any audit exceptions or disallowed costs incurred by CONTRACTOR or any of its subcontractors.
- I. Oregon Consumer Information Protection Act. CONTRACTOR, and any of its subcontractors, agree to comply with the Oregon Consumer Information Protection Act, ORS Sections 646A.600 through 646A.628.
- J. Taxpayer Identification Number. CONTRACTOR agrees to complete a Request for Taxpayer Identification Number and Certification (W-9) as a condition of CITY'S obligation to make payment. If CONTRACTOR fails to complete and return the W-9 to CITY, payment to CONTRACTOR may be delayed, or CITY may, in its discretion, terminate the Contract.

- K. ACH Direct Payment Authorization. CITY prefers to pay CONTRACTOR invoices via electronic funds transfers through the Automated Clearing House network. To initiate this more timely, efficient, and secure payment method, CONTRACTORS must complete the CITY'S ACH Vendor Direct Payment Authorization at <https://albanyoregon.gov/eft form>. Information provided on the form is exempt from public records disclosure under ORS 192.345(27).
- L. Pay Equity Compliance. As required by ORS 279B.235, CONTRACTOR must comply with ORS 652.220 and will not unlawfully discriminate against any of CONTRACTOR'S employees in the payment of wages or other compensation for work of comparable character on the basis of an employee's membership in a protected class. CONTRACTOR'S compliance with this section constitutes a material element of this Agreement and a failure to comply constitutes a breach that entitles CITY to terminate this Agreement for cause.
- Contracts valued at \$500,000 with CONTRACTORS that have 50 or more employees are required to complete Pay Equity Training through the State of Oregon's Department of Administrative Services, at <https://oregon.gov/PayEquity.aspx>, and submit a certificate as proof before awarded a contract. CONTRACTOR certifies that they have taken the required Pay Equity Training and have provided a certificate to the CITY.
- M. Preference for Recycled Materials. As required by ORS 279A.125, CONTRACTOR will use where applicable, recycled materials if: (a) the recycled product is available; (b) the recycled product meets applicable standards; (c) the recycled product can be substituted for a comparable non-recycled product; and (d) the recycled product's costs do not exceed the costs of non-recycled products by more than five (5) percent.
- N. Compliance with Tax Laws. CONTRACTOR certifies that they have authority and knowledge regarding the payment of taxes, and that to the best of their knowledge, are not in violation of any Oregon Tax Laws. For purposes of this certification, "Oregon Tax Laws" are those tax laws imposed by ORS 320.005 to 320.150 and ORS 403.200 to 403.250 and ORS Chapters 118, 314, 316, 317, 318, 321 and 323; the elderly rental assistance program under ORS 310.630 to 310.706; and any local tax laws administered by the Oregon Department of Revenue under ORS 305.620.
- O. Communicable Diseases. CONTRACTOR understands the risk to have contact with individuals, who have been exposed to and/or have been diagnosed with one or more communicable diseases, including but not limited to COVID-19 or other medical conditions, diseases, or maladies that exist, and it is impossible to eliminate the risk that CONTRACTOR could be exposed to and/or become infected through contact with or close proximity with an individual with a communicable disease. CONTRACTOR KNOWINGLY AND FREELY ASSUMES ALL SUCH RISKS, both known and unknown, EVEN IF ARISING FROM THE NEGLIGENCE OF THE RELEASEES OR OTHERS and assumes all full responsibility for CONTRACTOR'S participation.
- P. Debarment and Suspension. CONTRACTOR, its subcontractors, if any, will certify that during the term of an award of contract by City resulting from this procurement process, that neither it nor its principals is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation by any local or federal department or agency, or the State of Oregon. CONTRACTOR will not utilize subcontractors that have been debarred by any local or federal department or agency, or the State of Oregon.
- Q. Conflict of Interest. CONTRACTOR will prohibit any employee, governing body, subcontractor,

volunteer, or organization from participating in this Contract if the person(s) or entity has an actual or potential conflict of interest with regards to the funding provided under this agreement. CONTRACTOR must disclose in a timely manner and in writing to CITY all violations of Federal criminal law involving fraud, bribery, or gratuity potentially affecting funds provided under the agreement. Neither CONTRACTOR nor CONTRACTOR'S principals or governing body shall be involved in any current or pending litigation that will be construed as a conflict of interest in the CITY'S sole discretion.

ARTICLE III: RESPONSIBILITIES OF CITY

- A. Authorization to Proceed. CITY will authorize CONTRACTOR upon execution of the contract to start work on any of the services defined in Article I.
- B. Access to Records, Facilities, and Property. CITY will comply with reasonable requests from CONTRACTOR for inspection or access to CITY'S records, facilities, and properties by providing any and all information within its possession or control that may be reasonably helpful in the performance of the services provided herein.
- C. Timely Review. CITY will examine all studies, reports, specifications, proposals, and other documents presented by CONTRACTOR, obtain advice of an attorney, accountant, auditor, risk consultant and any other Contractors as CITY deems appropriate for such examination and render in writing decisions pertaining thereto in a timely manner so as not to unreasonably delay the services of CONTRACTOR.

ARTICLE IV: MODIFICATIONS

CITY or CONTRACTOR will not make modifications to the attached Agreement or these Standard Terms and Conditions except in writing as an amendment to the agreement. Said modifications will be agreed to by both parties, with scope of work, schedule, and compensation to be negotiated at the time the modification is proposed by either party. Modifications that do not meet these requirements will not be binding, and no further compensation will be allowed for any work performed.

ARTICLE V: COMPENSATION

CITY agrees to pay for the goods and services procured in Article I in accordance with the compensation provisions described in this Agreement and set forth in the Cost Proposal, Exhibit A.

Invoices shall be directed to the City of Albany, Attention: Accounts Payable, P.O. Box 490, Albany, OR 97321. Invoices may be emailed to accountspayable@albanyoregon.gov.

If payment is not made within 30 days, interest on the unpaid balance will accrue beginning on the 31st day at the rate of one percent (1%) per month or the maximum interest rate permitted by law, whichever is less. Such interest is due and payable when the overdue payment is made, unless delay in payment is due to a contested billing. CITY has the right to appeal or ask for clarification on any CONTRACTOR billing within 30 days of receipt of billing. Until said appeal is resolved or clarification is accepted, no interest will accrue on that portion of the billing. In the event of a contested billing, only that portion so contested will be withheld, and the undisputed portion will be paid in accordance with this Article V.

Notwithstanding anything in this Agreement to the contrary, CITY'S obligation to pay money beyond the current fiscal year will be subject to and dependent upon appropriations being made from

The General Aggregate and Products/Completed Operations Aggregate must apply separately on a "per project basis". A combination of primary and Excess Liability or an Umbrella Insurance policy may be used to meet the required limits of insurance.

- | | |
|---------------------------|---|
| 2. Automobile Liability: | \$2,000,000 Per Occurrence |
| 3. Employers Liability: | \$1,000,000 Each Accident
\$1,000,000 Disease Aggregate
\$1,000,000 Disease Each Employee |
| 4. Professional Liability | \$2,000,000 Per incident/Claim
\$2,000,000 Annual Aggregate |

C. Insurance Requirements for Subcontractors and Volunteers

Should CONTRACTOR subcontract any part of the Contract, CONTRACTOR will require those subcontractors or affiliates, if not covered under CONTRACTOR'S insurance, to obtain and keep in force for the duration of the Contract, insurance equal to the minimum values indicated above. Should CONTRACTOR use volunteers for any part of the Contract, CONTRACTOR should include volunteer under CONTRACTOR'S insurance policy and shall require volunteers or volunteer's legal guardian, when applicable, to sign a waiver of liability.

D. Deductibles and Self-Insured Retentions (SIR)

Any deductible or self-insured retention must be declared to and approved by CITY. At the option of CITY, either: the insurer will reduce or eliminate such deductible or self-insured retention as respects CITY, its officers, employees and agents; or CONTRACTOR will procure a letter of credit or surety bond guaranteeing payment of losses and related investigations, claim administration, and defense expenses.

E. Other Insurance Provisions

The policies are to contain, or be endorsed to contain, the following provisions:

1. Additional Insured Clause - The Commercial General Liability insurance coverage required for performance of this contract must be endorsed to name City of Albany and its officers, agents and employees as Additional Insured on any insurance policies required herein with respect to CONTRACTOR'S or any subcontractor's activities being performed under the Agreement. The Certificate of Insurance must include the additional insured endorsement. Coverage must be primary and non-contributory with any other insurance and self-insurance.
2. Any failure to comply with reporting provisions of the policies must not affect coverage provided to CITY, its officers, employees, or agents.
3. Workers' Compensation and Employers Liability Coverage – The insurer must agree to waive by endorsement, all rights of subrogation against the City of Albany, its officers, employees, and agents for losses arising from work performed by CONTRACTOR for CITY.

F. Excess or an Umbrella Insurance Policy

A combination of primary and Excess Liability or an Umbrella Insurance policy may be used to meet

the required limits of insurance. Indication of use must be provided either on the certificate of insurance or within the endorsements.

ARTICLE VIII: ASSIGNMENT

This Agreement is to be binding upon the heirs, successors, and assigns of the parties hereto and is not to be assigned by either party without first obtaining the written consent of the other. No assignment of this Agreement will be effective until the assignee assumes in writing the obligations of the assigning party and delivers such written assumption to the other original party to this Agreement.

Use of subcontractors by CONTRACTOR or subsidiary or affiliate firms of CONTRACTOR for technical or professional services will not be considered an assignment of a portion of this Agreement, and CONTRACTOR will remain fully responsible for the work performed, whether such performance is by CONTRACTOR or subcontractors. No subcontractors will be used without the written approval of CITY. Nothing herein will be construed to give any rights or benefits hereunder to anyone other than CITY and CONTRACTOR.

ARTICLE IX: INTEGRATION

These terms and conditions and the attachments represent the entire understanding of CITY and CONTRACTOR as to those matters contained herein. No prior oral or written understanding will be of any force or effect with respect to those matters covered herein. The agreement may not be modified or altered except in writing as specified in Article IV.

ARTICLE X: SUSPENSION OF WORK

CITY may suspend, in writing, and without cause, all or a portion of the work under this Agreement. CONTRACTOR may request that the work be suspended by notifying CITY, in writing, of circumstances that are interfering with the progress of work. CONTRACTOR may suspend work on the project in the event CITY does not pay invoices when due. The time for completion of the work will be extended by the number of days work is suspended. In the event that the period of suspension exceeds 90 days, the terms of the Agreement are subject to renegotiation and both parties are granted the option to terminate work on the suspended portion of the project, in accordance with Article XI.

ARTICLE XI: EARLY TERMINATION OF WORK

- A. CITY may terminate this Agreement for convenience at any time for any reason deemed appropriate in its sole discretion. Termination is effective immediately upon notice of termination given by CITY.
- B. Either party may terminate this Agreement in the event of a material breach by the other party that is not cured. Before termination is permitted, the party seeking termination must give the other party written notice of the breach, its intent to terminate, and fifteen (15) calendar days to cure the breach. If the breach is not cured within 15 calendar days, the party seeking termination may terminate immediately by giving written notice that the Agreement is terminated.
- C. If no notice of termination is given, relationships and obligations created by this Agreement will be terminated upon completion of all applicable requirements of this Agreement.

ARTICLE XII: REMEDIES AND PAYMENT ON EARLY TERMINATION

- A. If CITY terminates pursuant to Article XI(A), CITY will pay CONTRACTOR for work performed in accordance with the Agreement prior to the termination date. No other costs or loss of anticipated profits will be paid.
- B. If CITY terminates pursuant to Article XI(B), CITY is entitled all remedies available at law or equity. In addition, CONTRACTOR must pay CITY all damages, costs, and sums incurred by CITY as a result of the breach.
- C. If CONTRACTOR justifiably terminates the Agreement pursuant to Article XI(B), CONTRACTOR'S only remedy is payment for work prior to the termination. No other costs or loss of anticipated profits will be paid.
- D. If CITY'S termination under Article XI(B) above was wrongful, the termination will be automatically converted to one for convenience and CONTRACTOR will be paid as if the Agreement was terminated under Article XI(A).
- E. In the event of early termination, CONTRACTOR'S work product before the date of termination becomes property of CITY.
- F. In the event of termination, CONTRACTOR must perform such additional work as is necessary for the orderly filing of documents and closing of the project. The time spent on such additional work must not exceed 10 percent (10%) of the time expended on the terminated portion of the project prior to the effective date of termination. CONTRACTOR will be compensated for work actually performed prior to the date of termination plus work required for filing and closing as described in this Article.
- G. Upon termination, CONTRACTOR must provide to CITY all work products, material, documents, etc., gathered or compiled, related to the project, whether in CONTRACTOR'S possession at the time of termination or received later.

ARTICLE XIII: NOTICES

All notices and demands of a legal nature that either party may be required or may desire to serve upon the other party must be in writing and will be served upon the other party by personal service, by facsimile transmission, email followed by mail delivery of the notice, by overnight courier with proof of receipt, or by certified mail, return receipt requested, or by postage prepaid. Notices must be addressed as follows:

City:

M. Sean Kidd
City Attorney
260 Ferry Street SW, Suite 202
Albany, Oregon 97321
sean@longdel.com

With copy to:

City of Albany
Attn: Peter Troedsson, City Manager
P.O. Box 490
Albany, Oregon 97321
peter.troedsson@albanyoregon.gov

ARTICLE XIV: FORCE MAJEURE

Neither CITY nor CONTRACTOR will hold the other responsible for damages or delay in performance caused by acts of God, strikes, lockouts, accidents, or other events beyond the control of the other or the other's employees and agents.

ARTICLE XV: DISPUTE COSTS

In the event either party brings action to enforce the terms of this Agreement or to seek damages for its breach or arising out of any dispute concerning the terms and conditions hereby created, the prevailing party will be entitled to an award of its reasonable attorney fees, costs, and expenses, including expert witness fees, incurred therein, including such costs and fees as may be required on appeal.

ARTICLE XVI: CONFLICT AND SEVERABILITY

In the event of any inconsistency between the terms of this Agreement and the terms listed in any additional attachments to this Agreement, the terms of this Agreement will control. Any provision of this document found to be prohibited by law will be ineffective to the extent of such prohibition without invalidating the remainder of the document.

ARTICLE XVII: CONSTRUCTION

The Parties acknowledge that the parties and their counsel have reviewed this Agreement and that the normal rule of construction to the effect that any ambiguities are to be resolved against the drafting Party will not be employed in the interpretation of this Agreement or any exhibits or amendments hereto.

ARTICLE XVIII: NON-DISCRIMINATION/EQUAL EMPLOYMENT OPPORTUNITY

During the term of this Agreement, CONTRACTOR agrees as follows: CONTRACTOR will not discriminate against any employee or applicant for employment because of creed, religion, race, color, sex, marital status, sexual orientation, political ideology, ancestry, national origin, or the presence of any sensory, mental or physical handicap, unless based upon a bona fide occupational qualification. CONTRACTOR will take affirmative action to ensure that applicants are employed, and that employees are treated during employment, without regard to their creed, religion, race, color, sex, national origin, or the presence of any sensory, mental or physical handicap. Such action will include, but not be limited to the following: employment, upgrading, demotion, or transfer, recruitment or recruitment advertising layoff or termination, rates of pay or other forms of compensation, and selection for training, including apprenticeship.

ARTICLE XIX: COURT OF JURISDICTION

The laws of the State of Oregon will govern the validity of this Agreement, its interpretation and performance, and other claims related to it. Venue for litigation will be in the Circuit Courts in and for Linn County, Oregon.

ARTICLE XX: EFFECTIVE DATE

The date this Agreement is signed by the last party to sign it (as indicated by the date associated with that party's signature) will be deemed the date of this Agreement. If a party signs but fails to date a signature the date that the other party receives the signing party's signature will be deemed to be the date that the signing party signed this Agreement and the other party may inscribe that date as the date associated with the signing party's signature; provided, however, if only one party dated this Agreement, then such date is the date of this Agreement.

ARTICLE XXI: ELECTRONIC SIGNATURES

Each Party agrees that electronic signatures, whether digital or encrypted, of the parties included in this Agreement, if any, are intended to authenticate this writing and to have the same force and effect as manual signatures. The term "electronic signature" means any electronic sound, symbol, or process attached to or logically associated with a contract or record and executed and adopted by a party with the intent to sign, authenticate or accept such contract or record. Any signature hereto or to any other certificate, agreement or document related to this transaction, and any contract formation or recordkeeping through electronic means will have the same legal validity and enforceability as a manually executed signature or use of a paper-based recordkeeping system to the fullest extent permitted by applicable law and may not be denied legal effect ORS 84.019.

ARTICLE XXII: INTERGOVERNMENTAL COOPERATIVE PROCUREMENT

Pursuant to ORS 279A.205 through 279A.215, other Public Agencies may use the purchase agreement resulting from this RFP unless CONTRACTOR expressly notes in the proposal that the prices quoted are available to the City only. The condition of such use by other Agencies is that any such Agency must make and pursue contact, purchase order, delivery arrangements, and all contractual remedies directly with the CONTRACTOR; the City accepts no responsibility for performance by either the successful CONTRACTOR or such other Agency using this Agreement. With such condition, the City consents to such use by any other Public Agency.

INSURANCE AGENT OF RECORD AGREEMENT:

CONTRACTOR:

Date: _____

By: _____

Company

By: _____

Title: _____

By: _____

Title: _____

Mailing
Address _____

Telephone: _____

Fax: _____

Email

Social Security No. (if individual)

Unique Entity Identifier (UEI) (federal funds, if applicable)

Type of Disadvantaged Business Enterprise (DBE) or COBID (if applicable)

Tax Identification No. (if incorporated)

Note: Signatures of two officers are required for a corporation.

CITY OF ALBANY, OREGON:

Date: _____

By: _____

Jeanna Yeager
Finance Director

APPROVED AS TO FORM:

By: _____

M. Sean Kidd, City Attorney

ATTACHMENT B – DEFINITIONS

The following definitions are used in these contract documents, except where the context otherwise clearly requires.

ACFR: Annual Comprehensive Financial Report.

ACH - AUTOMATED CLEARING HOUSE: the central distribution point for transferring funds electronically for participating depository financial institutions. Transactions are accumulated and sorted by destination for transmission during a predetermined period. It includes small dollar payments in large transaction volume.

ADDENDUM: a written change, addition, alteration, correction, or revision to a solicitation or contract document. The name commonly given to the document used to revise a solicitation.

AGREEMENT: an understanding between two or more parties in which they state a common understanding and intention regarding past or future intentions or facts, sometimes with a view to altering performance, rights, and obligations. When the additional elements of a contract are satisfied, e.g., mutual obligation (consideration), capacity, definiteness, and legal purpose, contracts may be formed.

ALN: Assistance Listing Number.

ARA: Albany Revitalization Agency.

AWARD PROTEST: a written objection by an unsuccessful offeror to the entity regarding an award decision.

BAFO - Best and Final Offer: a process requested from one proposer or short-listed proposers for their best price(s) for a specific solicitation prior to determining a contract award. Sometimes used during the Request for Proposals method of procurement.

BIDDER, PROPOSER, RESPONDENT: the responder to a solicitation.

CAG: Citizen Advisory Groups.

CARA: Central Albany Revitalization Area.

CARDINAL CHANGE: a change that is beyond the scope of the contract, and thus cannot be ordered by the contracting officer under the contract's change clause.

CFDA: Catalog of Federal Domestic Assistance and currently referred to as Assistance Listings.

CFR - Code of Federal Regulations: the codification of the general and permanent rules published in the Federal Register by the executive departments and agencies of the U.S. federal government.

CIP: Capital Improvement Program.

CIS: CityCounty Insurance Services.

CITY, OWNER: the City of Albany, Oregon.

CITY'S REPRESENTATIVE or DESIGNEE, or CONTRACT ADMINISTRATOR: the person or persons designated by the City to administer this contract and monitor compliance hereunder.

CLARIFICATION: a communication with a proposer for the sole purpose of eliminating minor irregularities or apparent clerical mistakes in a proposal. A clarification may be initiated by either the proposer or purchaser and does not give the proposer an opportunity to revise or modify its proposal, except to the extent that the correction of the apparent clerical mistakes results in revision.

COBID: Certification Office for Business Inclusion and Diversity.

COMPLETED WORK: all meetings conducted, minutes prepared and approved, exercise completed, after-action reports and improvement reports prepared and approved, and final bill submitted to and received by the City of Albany.

CONTRACT: an obligation, such as an accepted offer, between competent parties upon a legal consideration to do or abstain from doing some act. A legally binding promise enforceable by law.

CONTRACT DOCUMENTS: all written documents existing at the time of contract execution and setting forth the obligations of the parties, including the Request for Proposals, Standard Terms and Conditions Agreement, Statement of Work, Proposal Certification, Certification for Corporation or Independent Contractor, Responsibility Certification, Insurance Requirements, Cost Proposal, and other attachments, exhibits, or appendices, addenda applicable to the final Contract Documents, and written amendments to the Contract Documents executed by the parties from time to time, and any documents expressly incorporated by reference elsewhere in Contract Documents enumerated above.

CONTRACTOR, CONSULTANT, VENDOR, SUPPLIER, FIRM, COMPANY: the person or business that has undertaken to perform the work subject to this contract and by whom or on whose behalf the contract was signed.

DBE - Disadvantaged Business Enterprise: include small businesses that are at least 51% owned by Minorities: Blacks, Hispanics, Native Americans, Asian-Pacific Americans and Subcontinent Asian Americans; Women; and Other individuals on a case-by-case basis.

DEI - Diversity, Equity, and Inclusion: diversity is the presence of differences that may include race, gender, religion, sexual orientation, ethnicity, nationality, socioeconomic status, language, (dis)ability, age, religious commitment, or political perspective.

DELIVERABLE: the acceptable product or service as identified in the statement of work; received as requested at the right time, place, quality, quantity, and price. Deliverable must be measurable to determine that all conditions and acceptable performance are met.

DISADVANTAGED BUSINESS ENTERPRISE (DBE) PROGRAM: includes firms that are certified as a DBE from the Certification Office for Business Inclusion and Diversity, or COBID.

EFT: Electronic Funds Transfer.

EMMA: Electronic Municipal Market Access.

FOIA: Freedom of Information Act.

GFOA: Government Finance Officers Association.

HIPAA means Health Insurance Portability and Accountability Act and is United States legislation that provides data privacy and security provisions for safeguarding medical information.

INVOICE: the document reflecting account details for the billing period including debits, credits, transaction detail and balance due.

INTERGOVERNMENTAL COOPERATIVE PURCHASING: cooperative procurement efforts may result in contracts that other entities may "piggyback."

ISO: Insurance Services Office.

MINOR IRREGULARITY: a variation from the solicitation that does not affect the price of the contract or does not give an offeror an advantage or benefit not enjoyed by the other offerors or does not adversely impact the interests of the contracting party.

MSRB: Municipal Securities Rulemaking Board.

MWESB: Minority-owned, Women-owned, or Emerging Small Business.

NON-RESPONSIVE: a response to a solicitation that does not conform to the mandatory or essential requirements contained in the solicitation.

NOTICE OF AWARD: a written notification from a public entity to a successful Proposer stating that a contract has been awarded to them in accordance with a proposal they previously submitted.

NOTICE OF INTENT (NOI): public notice issued to announce an action an entity intends to take with a certain supplier or service provider.

NOTICE TO PROCEED (NTP): a notification letter from an entity to a contractor that states the date on which the contractor is to begin work on an awarded project; it also marks the beginning of the performance period as stated in the contract.

OAR: Oregon Administrative Rules.

OHA: Oregon Health Authority.

ORS: Oregon Revised Statutes.

OSHA: Occupational Safety and Health Administration.

PARTICIPATING AGENCY: any eligible organization executing their own contract with Contractor as allowed by Intergovernmental Cooperative Purchasing under the Contract.

PROPOSERS LIST: a list of names and addresses of suppliers from whom bids, proposals, or quotations can be solicited.

PROTECTED CLASS: a group of persons distinguished by race, color, religion, sex, sexual orientation, national origin, marital status, veteran status, disability, or age.

RESIDENT PROPOSER: a Proposer that has paid unemployment taxes or income taxes in the State of Oregon during the 12-calendar months immediately preceding submission of a proposal, has a business address in the State of Oregon, and has stated in the proposal response that the Proposer is a "Resident Proposer" as defined in ORS 279A.120(1).

REQUIREMENTS CONTRACT: a form of indefinite delivery/indefinite quantity (IDIQ) contract where all actual purchase requirements for specific supplies or services during the contract period are filled by the selected Proposer, with deliveries to be scheduled by placing orders with the Proposer.

RESPONSIBLE PROPOSER: a person who has submitted an Offer and meets the standards set forth in OAR 137-047-0640 and that has not been debarred or disqualified by the Contracting Agency under OAR 137-047-0575. When used alone, Responsible means meeting the aforementioned standards and is also defined in ORS 279B.110.

RESPONSIVE PROPOSAL: an Offer or Proposal that substantially complies in all material respects with all prescribed procurement procedures and applicable solicitation requirements. When used alone, Responsive means having the characteristic of substantially complying in all material respects with applicable solicitation requirements.

RFP – Request for Proposals.

PROPOSER: an individual or supplier who submits a proposal that may or may not be in response to a Request for Proposals.

SDS - Safety Data Sheets: includes information such as the properties of each chemical; the physical, health, and environmental health hazards; protective measures; and safety precautions for handling, storing, and transporting the chemical.

SIR: Self-Insured Retention.

SOW - STATEMENT OF WORK: the formal document that defines the entire scope of the work involved for a Supplier or Contractor and clarifies deliverables, costs, and timeline, and provides

direction on the specific services that the Contractor is expected to perform by detailing the work activities and deliverables.

SPECIFICATIONS: the directions, requirements, explanations, terms, and provisions pertaining to the various features of the work, the manner and method of proposing for the work, the manner and method of performance of the work, and the manner and method of payment all as they appear in the contract documents.

STATEMENT OF TIME: a period of time, unless stated as a number of City business days, will include Saturdays, Sundays, and holidays. The word "day" as used in this Document, and any resulting contract awarded as a result of this process, will constitute a calendar day of 24 hours measured from midnight to the next midnight.

SUBSTANTIAL COMPLETION: a stage in the progress of the Work when the Work or designated portion thereof is sufficiently complete in accordance with the Contract Documents so that the Owner can occupy or use the Work or a portion thereof for its intended use.

UEI: Unique Entity Identifier; may be required of Proposers awarded federally funded contracts.

WORK: all tasks specified or necessarily implied in these Contract Documents to perform and complete their intended result. The term encompasses all labor, materials, supplies, tools, equipment, fuel, administrative and support services, overhead, and other direct and indirect expenses necessary to achieve the result intended by the Contract Documents.

LIST OF APPENDICES

Appendix A – Insurance Coverage Declarations
Appendix B – 2023 Summary of Coverages