



**METRO**

PEOPLE PLACES

OPEN SPACES

RFP 10-1695 PLN

**GRANT WRITING AND EDITING SERVICES**

**Metro Planning and Development**

600 N.E. Grand Avenue  
Portland, Oregon 97232  
(503) 797-1700

**Project Manager:**

Christina Deffebach  
Land Use Planning Manager  
(503) 797-1921

[christina.deffebach@oregonmetro.gov](mailto:christina.deffebach@oregonmetro.gov)

**Procurement Contact:**

Sherrie Blackledge  
Procurement Analyst  
(503) 797-1724

[sherrie.blackledge@oregonmetro.gov](mailto:sherrie.blackledge@oregonmetro.gov)

Notice is hereby given that proposals for **RFP 10-1695 PLN** for: **Grant Writing and Editing Services** shall be received by Metro, 600 N.E. Grand Avenue, Portland OR 97232 or electronically by [sherrie.blackledge@oregonmetro.gov](mailto:sherrie.blackledge@oregonmetro.gov) until **2:00 p.m., Wednesday, June 16, 2010**. It is the sole responsibility of the proposer to ensure that Metro receives the Proposal by the specified date and time. All late Proposals shall be rejected. PROPOSERS SHALL REVIEW ALL INSTRUCTIONS AND CONTRACT TERMS AND CONDITIONS.

# Request for Proposals

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FOR

## GRANT WRITING AND EDITING SERVICES

### I. INTRODUCTION

The Planning and Development Department of Metro, a metropolitan service district organized under the laws of the State of Oregon and the Metro Charter, located at 600 N.E. Grand Avenue, Portland, Oregon 97232-2736, is requesting proposals for a **Grant Writing and Editing Services**. Proposals will be due no later than **2:00 p.m., Wednesday, June 16, 2010** in Metro's business offices at 600 NE Grand Avenue, Portland, OR 97232-2736 or via email at [sherrie.blackledge@oregonmetro.gov](mailto:sherrie.blackledge@oregonmetro.gov).

Details concerning the project and proposal are contained in this document.

### II. BACKGROUND/HISTORY OF PROJECT

Metro is taking a lead role in preparing an application for a federal Sustainable Communities planning grant for \$3 million to \$5 million. If successful, the funding would become available at the end of 2010 and be allocated to a mix of public agencies, jurisdictions, non-profit organizations and private contractors who would each have a role in the project. Though Metro often plays a role as a convener of many parties and has successfully competed for federal funding, the short timeframe anticipated to prepare the grant, the unique elements it would fund and the involvement of multiple individuals who will have a role in the grant development present the need for assistance from a professional grant writer. Metro has the resources to design and produce the final grant application.

### III. PROPOSED SCOPE OF WORK/SCHEDULE

Metro is seeking proposals from qualified firms to perform the following services and to deliver the products described:

#### Tasks and Products

- Review the Notice of Funding Availability (NOFA), identify all of the required elements of the application, and track that the application meets the requirements.
- Compare the draft Metro application to the intent of the NOFA and identify points where the draft application could be strengthened, including references and quotes and other descriptions that would help make the case.
- Building off of the initial drafts and outlines which will be prepared by lead staff for each section, write the grant application as one consistent document, using consistent tone, messages terms and data. The contractor will need to meet with three (3) to four (4) leads for different sections of the grant to discuss and refine the application concepts.
- Incorporate edits to the edited version based on grant team review, highlight and resolve conflicts in review team comments.
- Produce a final edited text version of the grant application that is ready for design and layout.

#### Schedule

- The grant editor will have approximately four (4) weeks to prepare the final edited text version of the grant which is expected to be between mid-June and mid-July, depending on the date of the NOFA.

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## IV. QUALIFICATIONS/EXPERIENCE

Proposers shall have the following experience:

- Experience with federal grant application and requirement procedures.
- Experience with submitting successful grants with short timelines.
- Experience in editing works from multiple authors to create a consistent document.
- Experience in use of language and data to create strong messages.

## V. PROJECT ADMINISTRATION

The project manager at Metro will be Chris Deffebach.

Randy Tucker, Metro, will be responsible for final resolution of editorial and messaging conflicts.

## VI. PROPOSAL INSTRUCTIONS

### A. Submission of Proposals

Six (6) copies of the proposal shall be furnished to Metro, addressed to:

Sherrie Blackledge  
Planning & Development Department  
Metro  
600 NE Grand Avenue  
Portland, OR 97232-2736

Or

One (1) electronic copy to: [sherrie.blackledge@oregonmetro.gov](mailto:sherrie.blackledge@oregonmetro.gov).

### B. Deadline

Proposals will not be considered if received after **2:00 p.m., Wednesday, June 16, 2010**.  
Proposers should reserve the **afternoon of Friday, June 18, 2010** for interviews.

### C. Request for Proposals as Basis for Proposals

This Request for Proposals (RFP) represents the most definitive statement Metro will make concerning the information upon which Proposals are to be based. Any verbal information which is not addressed in this RFP will not be considered by Metro in evaluating the Proposal. All questions relating to this RFP should be addressed to Chris Deffebach at (503) 797-1921. Any questions, which in the opinion of Metro, warrant a written reply or RFP amendment will be furnished to all parties receiving this RFP. Metro will not respond to questions received after Monday, June 14, 2010.

### D. Information Release

All Proposers are hereby advised that Metro may solicit and secure background information based upon the information, including references, provided in response to this RFP. By submission of a proposal all Proposers agree to such activity and release Metro from all claims arising from such activity. In Accordance with Oregon Public Records Law (ORS 192), proposals submitted will be considered part of the public record, except to the extent they are exempted from disclosure.

### E. Minority, Women and Emerging Small Business Program

# Request for Proposals

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In the event that any subcontracts are to be utilized in the performance of this agreement, the Proposer's attention is directed to Metro Code provisions 2.04.100, which encourages the use of minority, women and emerging small businesses (MWESB) to the maximum extent practical. Copies of these MWESB requirements are available from the Metro Procurement Office, 600 NE Grand Avenue Portland, Oregon 97232, (503) 797-1816.

## VII. PROPOSAL CONTENTS

The proposal should contain not more than seven (7) pages of written material (excluding biographies and brochures, which may be included in an appendix), describing the ability of the consultant to perform the work requested, as outlined below. The proposal should be submitted on recyclable, double-sided recycled paper (post consumer content). No waxed page dividers or non-recyclable materials should be included in the proposal.

- A. Transmittal Letter: Indicate who will be assigned to the project, who will be project manager, and that the proposal will be valid for ninety (90) days.  
-- 1 page
- B. Approach/Project Work Plan: Describe how the work will be done within the given timeframe and budget. Include a proposed work plan and schedule.  
-- 1 page
- C. Staffing/Project Manager Designation: Identify specific personnel assigned to major project tasks, their roles in relation to the work required, percent of their time on the project, and special qualifications they may bring to the project. Include resumes of individuals proposed for this contract.

Metro intends to award this contract to a single firm to provide the services required. Proposals must identify a single person as project manager to work with Metro. The consultant must assure responsibility for any subconsultant work and shall be responsible for the day-today direction and internal management of the consultant effort.

-- 1 page

- D. Experience: Indicate how your firm meets the experience requirements listed in Section IV of this RFP. List projects conducted over the past five years which involved services similar to the services required here. For each of these other projects, include the name of the customer contact person, his/her title, role on the project, and telephone number. Identify persons on the proposed project team who worked on each of the other projects listed, and their respective roles.  
-- 1 page
- E. Cost/Budget: Present the proposed cost of the project and the proposed method of compensation. List hourly rates for personnel assigned to the project, total personnel expenditures, support services, and subconsultant fees (if any). Requested expenses should also be listed. Metro has established budget not to exceed \$10,000 for this project.  
-- 1 page
- F. Diversity: Include your firm's policies and practices on reaching out to MWESB subcontractors and suppliers as well as any past utilization of MWESB's. Proposers should also include copies of their policies on recruiting and retaining a diverse work force.  
-- 1 page
- G. Exceptions and Comments: To facilitate evaluation of proposals, all responding firms will adhere to the format outlined within this RFP. Firms wishing to take exception to, or comment on, any specified criteria

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within this RFP are encouraged to document their concerns in this part of their proposal. Exceptions or comments should be succinct, thorough and organized.

-- 1 page

## VIII. GENERAL PROPOSAL/CONTRACT CONDITIONS

- A. Limitation and Award: This RFP does not commit Metro to the award of a contract, nor to pay any costs incurred in the preparation and submission of proposals in anticipation of a contract. Metro reserves the right to waive minor irregularities, accept or reject any or all proposals received as the result of this request, negotiate with all qualified sources, or to cancel all or part of this RFP.
- B. Billing Procedures: Proposers are informed that the billing procedures of the selected firm are subject to the review and prior approval of Metro before reimbursement of services can occur. Contractor's invoices shall include an itemized statement of the work done during the billing period, and will not be submitted more frequently than once a month. Metro shall pay Contractor within 30 days of receipt of an approved invoice.
- C. Validity Period and Authority: The proposal shall be considered valid for a period of at least ninety (90) days and shall contain a statement to that effect. The proposal shall contain the name, title, address, and telephone number of an individual or individuals with authority to bind any company contacted during the period in which Metro is evaluating the proposal.
- D. Conflict of Interest. A Proposer filing a proposal thereby certifies that no officer, agent, or employee of Metro or Metro has a pecuniary interest in this proposal or has participated in contract negotiations on behalf of Metro; that the proposal is made in good faith without fraud, collusion, or connection of any kind with any other Proposer for the same call for proposals; the Proposer is competing solely in its own behalf without connection with, or obligation to, any undisclosed person or firm.
- E. Equal Employment and Nondiscrimination Clause Metro and its contractors will not discriminate against any person(s), employee or applicant for employment based on race, color, religion, sex, national origin, age, marital status, familial status, gender identity, sexual orientation, disability for which a reasonable accommodation can be made, or any other status protected by law. Metro fully complies with Title VI of the Civil Rights Act of 1964 and related statutes and regulations in all programs and activities. For more information, or to obtain a Title VI Complaint Form, see [www.oregonmetro.gov](http://www.oregonmetro.gov).
- F. Intergovernmental Cooperative Agreement (Requires competitive solicitation) – Pursuant to ORS 279A and the Metro public contract code, Metro participates in an Intergovernmental Cooperative Purchasing program by which other public agencies shall have the ability to purchase the goods and services under the terms and conditions of this awarded contract. Any such purchases shall be between the Contractor and the participating public agency and shall not impact the Contractor's obligation to Metro under this agreement. Any estimated purchase volumes listed herein do not include volumes for other public agencies, and Metro makes no guarantee as to their participation in any purchase. Any bidder may decline to extend the prices and terms of this solicitation to any or all other public agencies upon execution of this contract. Unless the bidder specifically declines to participate in the program by marking the box on the contract declining to participate, the bidder agrees to participate in the Intergovernmental Cooperative Purchasing program.

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## IX. EVALUATION OF PROPOSALS

A. Evaluation Procedure: Proposals received that conform to the proposal instructions will be evaluated. The evaluation will take place using the evaluation criteria identified in the following section. Interviews may be requested prior to final selection of one firm.

B. Evaluation Criteria: This section provides a description of the criteria which will be used in the evaluation of the proposals submitted to accomplish the work defined in the RFP.

	Percentage of Total Score
— Project Work Plan/Approach	
1. Demonstration of understanding of the project objectives	20%
2. Performance methodology	10%
— Project Staffing Experience	
1. Project consultant	25%
2. Commitment to project	15%
— Diversity	
1. Proposers will be evaluation on their past performance in contracting with minority, women and emerging small businesses (MWESB) as well as any proposed usage on this contract. Employment practices that promote the use of minorities and women in the work place will also be evaluated.	10%
— Budget/Cost Proposal	
1. Projected cost/benefit of proposed work plan/approach	10%
2. Commitment to budget and schedule parameters	10%
	100%

## X. APPEAL OF CONTRACT AWARD

Aggrieved proposers who wish to appeal the award of this contract must do so in writing within seven (7) days of issuance of the notice of intent to award by Metro. Appeals must be submitted to Darin Matthews, Procurement Officer, 600 NE Grand, Portland, Oregon 97232 and must state the specific deviation of rule or statute in the contract award. Metro will issue a written response to the appeal in a timely manner.

## XI. NOTICE TO ALL PROPOSERS -- STANDARD AGREEMENT

The attached personal services agreement is a standard agreement approved for use by the Office of Metro Attorney. This is the contract the successful Proposer will enter into with Metro; it is included for your review prior to submitting a proposal.



# Personal Services Agreement

Must be Under \$25,000

Contract No. \_\_\_\_\_

THIS AGREEMENT is between Metro, a metropolitan service district organized under the laws of the State of Oregon and the Metro Charter, whose address is 600 NE Grand Avenue, Portland, Oregon 97232-2736, and \_\_\_\_\_ whose address is \_\_\_\_\_, referred herein to as "CONTRACTOR."  
 In exchange for the promises and other consideration set forth below, the parties agree as follows:

1. Duration: This personal services Agreement shall be effective June 28, 2010, and shall remain in effect until and including December 31, 2010, unless terminated or extended as provided in this Agreement.
2. Payment: Metro shall pay CONTRACTOR for services performed in an amount not to exceed **TEN THOUSAND AND NO/100THS DOLLARS (\$10,000.00)**.
3. Terms: Payment for services will be made in the manner one lump sum. Payment to be made within 30 days of receipt of an approved invoice.
4. Scope of Work: CONTRACTOR shall provide all services and materials specified below which is incorporated into this Agreement by reference. All services and materials shall be provided by CONTRACTOR in accordance with the Scope of Work in a competent and professional manner.

**SCOPE OF WORK** (attach additional pages as needed)

**SCOPE OF WORK begins on Page 3.**

All terms on the reverse side of this document are hereby made a part of this AGREEMENT.

**Contractor**

**Metro**

Signature: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Date: \_\_\_\_\_

Name: \_\_\_\_\_

Title: Director

Address: \_\_\_\_\_

Department: Planning & Development

\_\_\_\_\_

Division: Long Range Land Use Planning

Telephone: \_\_\_\_\_

Telephone: 503-797-1714

Fax: \_\_\_\_\_

Project Manager: Christina Deffebach

Tax I.D. or SS#: \_\_\_\_\_

Telephone/Fax: 503-797-1921

Copy 1 – Contracts

Copy 2 – Department

Copy 3 – Contractor

THE PARTIES AGREE AS FOLLOWS:

ARTICLE I: LIABILITY AND INDEMNITY

CONTRACTOR is an independent contractor and assumes full responsibility for its performance and assumes full responsibility for all liability for bodily injury or physical damage to persons or property arising out of or related to this Contract. CONTRACTOR shall indemnify, defend and hold harmless METRO, its elected officials, officers, employees and agents, from any and all claims, demands, damages, actions, losses, and expenses, including attorney's fees, whether before the commencement of litigation at trial or on appeal, arising out of or in any way connected with its performance of this Contract. CONTRACTOR is solely responsible for paying CONTRACTOR's subcontractors and nothing contained herein shall create or be construed to create any contractual relationship between any subcontractor(s) and METRO. CONTRACTOR is solely responsible for the acts and omissions of its' agents, employees, subcontractors, and/or representatives and for all claims.

ARTICLE II: TERMINATION

METRO may terminate this Contract upon giving CONTRACTOR seven (7) days' written notice. In the event of termination, CONTRACTOR shall be entitled to payment for goods received prior to the date of termination. METRO shall not be liable for any indirect or consequential, or any other damages whatsoever. Termination by METRO shall not waive any claim or remedies it may have against CONTRACTOR.

ARTICLE III: INSURANCE

CONTRACTOR shall purchase and maintain at CONTRACTOR's expense, the following types of insurance covering the CONTRACTOR, its employees and agents. Insurance coverage shall be a minimum of \$1,000,000 per occurrence.

- A. Broad form comprehensive general liability insurance covering personal injury, property damage, and bodily injury with automatic coverage for premises and operation and product liability. The policy must be endorsed with contractual liability coverage. METRO, its elected officials, departments, employees, and agents shall be named as an ADDITIONAL INSURED.
- B. Automobile bodily injury and property damage liability insurance. METRO, its elected officials, departments, employees, and agents shall be named as an ADDITIONAL INSURED.

This insurance as well as all Workers' Compensation coverage for compliance with ORS 656.017 must cover CONTRACTOR'S operations under this Contract, whether such operations are by CONTRACTOR or by any subcontractor or anyone directly or indirectly employed by either of them.

CONTRACTOR shall provide METRO with a certificate of insurance complying with this article and naming METRO as an additional insured within fifteen (15) days of execution of this Contract or twenty-four (24) hours before services under this Contract commence, whichever date is earlier. Notice of any material change or policy cancellation shall be provided to METRO thirty days (30) prior to the change.

ARTICLE IV: PUBLIC CONTRACTS

All applicable provisions of ORS Chapters 187 and 279A & B, and all other terms and conditions necessary to be inserted into public contracts in the State of Oregon, are hereby incorporated as if such provision were a part of this Agreement including, but not limited to, ORS 279B.220 TO 279B.235.

ARTICLE V: ATTORNEY'S FEES

In the event of any litigation concerning this Contract, the prevailing party shall be entitled to reasonable attorney's fees and court costs, including fees and costs on appeal to any appellate courts.

ARTICLE VI: QUALITY OF GOODS

Unless otherwise specified, all materials shall be new and both workmanship and materials shall be of the highest quality. All workers and subcontractors shall be skilled in their trades. CONTRACTOR guarantees all work against defects in material or workmanship for a period of one (1) year from the date of acceptance or final payment by METRO, whichever is later. All guarantees and warranties of goods furnished to CONTRACTOR or subcontractors by any manufacturer or supplier shall be deemed to run to the benefit of METRO.

In addition to any express warranties provided by the CONTRACTOR, all implied warranties covered by ORS Chapter 72 shall apply to any goods provided under this Contract, and are hereby expressly not disclaimed.

ARTICLE VII: SAFETY

If services of any nature are to be performed in connection with the provision of goods pursuant to this Contract, CONTRACTOR shall take all necessary precautions for the safety of employees and others in the vicinity of the services being performed and shall comply with all applicable provisions of federal, state and local safety laws and building codes, including the acquisition of any required permits. All applicable Material Safety Data (MSD) sheets shall accompany the goods.

ARTICLE VIII: RIGHT TO WITHHOLD PAYMENTS

METRO shall have the right to withhold from payments due CONTRACTOR such sums as necessary, in METRO's sole opinion, to protect METRO against any loss, damage or claim which may result from CONTRACTOR's performance or failure to perform under this agreement or the failure of CONTRACTOR to make proper payment to any suppliers or subcontractors.

ARTICLE IX: COMPLIANCE

CONTRACTOR shall comply with federal, state, and local laws, statutes, and ordinances relative to the execution of the work. This requirement includes, but is not limited to, non-discrimination, safety and health, environmental protection, waste reduction and recycling, fire protection, permits, fees and similar subjects.

ARTICLE X: INTEGRATION OF CONTRACT DOCUMENTS

All of the provisions of any bidding documents including, but not limited to, the Advertisement for Bids, General and Special Instructions to Bidders, Proposal, Scope of Work, and Specifications which were utilized in conjunction with the bidding of this Contract are hereby expressly incorporated by reference. Otherwise, this Contract represents the entire and integrated agreement between METRO and CONTRACTOR and supersedes all prior negotiations, representations or agreements, either written or oral. This Contract may be amended only by written instrument signed by both METRO and CONTRACTOR. The law of the state of Oregon shall govern the construction and interpretation of this Contract.

ARTICLE XI: ASSIGNMENT

CONTRACTOR shall not assign any rights or obligations under or arising from this Contract without prior written consent from METRO, which consent shall not be unreasonable withheld.



**METRO**

600 NE Grand Ave.  
Portland, OR 97232-2736  
(503) 797-1700

## Scope of Work

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**Payment Methodology.** Metro shall pay for the actual Services performed under this Contract according to the agreed upon hourly billing rates as listed above. Metro will also pay for actual direct non-labor costs itemized separately from the personnel costs, and with proper documentation. Documentation that may be requested at Metro's discretion may include receipts, timesheets, and accounting reports documenting actual expenses incurred, and must be received before these expenses can be reimbursed. Payments may not exceed **TEN THOUSAND AND NO/100THS DOLLARS (\$10,000.00)**.

Contractor agrees to invoice all Services at no greater than the agreed upon hourly billing rates as outlined above and actual non-labor rates specified in this Contract. These rates may be amended only at Metro's discretion and through a contract amendment signed by both parties.

**Basis for Payment.** Metro shall reimburse all allowable expenses that Contractor presents for payment upon Metro's approval of Contractor's invoice submitted in accordance with the terms of the Contract for services performed and materials delivered, but only after Metro has determined that Contractor has completed, and Metro has accepted, the invoiced services. The Contractor shall submit invoices in a timely manner to Metro.

**Invoices and Payments.** Contractor shall submit invoices requesting payment to Metro's Project Manager for approval. Contractor shall not submit invoices to Metro's Project Manager any more frequently than once per month. Metro reserves the right to request, in writing, full itemization and receipts for, but not limited to, any or all labor and direct costs billed by the Contractor. Contractor shall provide receipts to Metro within five (5) business days of Metro's request. Metro will not make payment to Contractor under the applicable invoice until Metro has received all requested receipts from the Contractor.

**Corrective Work.** Contractor is responsible to complete all Services, including deliverables, as defined in the Scope of Work to the satisfaction of the Metro. If Metro, in its sole discretion, determines that the Services are unacceptable, Contractor is responsible to correct any deficiencies in the Services to Metro's satisfaction without further compensation. Metro may withhold other payments until any deficiencies have been corrected to the Metro's satisfaction.

**Increases. *Fixed rates throughout the term:*** The hourly billing rates established above shall remain fixed for the duration of this Contract. Metro may, by amendment to this Contract, agree to appropriate increases in the maximum compensation payable under the Contract, should any Metro-approved increase occur in the scope, character, schedule or complexity of Services as outlined in the Scope of Work. Contractor shall not commence any Services authorized under an amendment until that amendment has received all necessary government approvals.

**Travel.** For all travel expenses pre-approved by Metro, Metro shall reimburse Contractor according to the current federal rates in effect on the date travel occurs, or the actual expenses, whichever is less. Current federal rates can be found at [www.gsa.gov](http://www.gsa.gov) and navigating to the section titled "Per Diem Rates" under Travel Resources. Reimbursement of mileage shall be made at IRS Standard Mileage Rate, which can be found at [www.irs.gov](http://www.irs.gov).