



Paper Reduction Tool Development

RFP 12-2040

Metro Sustainability Department

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

Project Manager

Will Elder
will.elder@oregonmetro.gov
503-797-1581

Department Procurement Staff

Scott Steyer
scott.steyer@oregonmetro.gov
503-797-1858

Notice is hereby given that proposals for RFP 12-2040 for Paper Reduction Tool Development shall be received by Metro, 600 NE Grand Avenue, Portland OR 97232 until close of business on February 14th, 2012. It is the sole responsibility of the proposer to ensure that Metro receives the Proposal by the specified date and time. Proposals may be mailed, delivered, faxed or emailed. Proposers shall review all instructions and contract terms and condition.

Request for Proposals - Informal (RFP 12-2040)

I. INTRODUCTION

The Sustainability Department of Metro, a metropolitan service district organized under the laws of the State of Oregon and the Metro Charter, located at 600 NE Grand Avenue, Portland, OR 97232-2736, is requesting proposals for Paper Reduction Tool Development. Proposals will be due as indicated on the RFP cover page.

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

II. BACKGROUND/HISTORY OF PROJECT

Metro provides \$600,000 to the seven jurisdictions in the Metro region to provide technical assistance to businesses on recycling, waste prevention and buying recycled-content materials. The program's goal is to reduce the amount of business waste generated and disposed. The RAW program services are delivered by Recycling Specialists employed by each RAW-funded jurisdiction.

Recycling Specialists evaluate business practices and provide business owners and managers with recommendations to achieve higher levels of waste diversion. All businesses, non-profits, institutions and government facilities are eligible for the program. The RAW program provides free, on-site assistance to over 1,000 businesses annually.

In 2011, Envirolssues was hired to identify and understand the barriers and solutions to paper reduction technology and develop strategies for working with small- and medium-sized (20-250 employees) paper-generating businesses RAW has already worked with. Envirolssues also created a list of potential tools, resources and strategies that could be adopted or created by the region to address those barriers and reduce paper consumption in paper generating businesses.

III. PROPOSED SCOPE OF WORK/SCHEDULE

Metro is seeking proposals from qualified firms to perform the following:

A. Project Goal:

Develop tools that provide solutions to the barriers of paper reduction in small and medium office businesses that utilize office paper, based on previous research conducted by Envirolssues. Conduct training for Recycle at Work Specialists on how to use the tools and engage businesses in their use.

B. Develop "tools" using Envirolssues September 23, 2011 report "Office Paper Reduction Research Project" as a resource. This report can be made available upon request, but the following are the recommended tools. Consultant may provide additional suggestions or refinements to this list based on need addressed under "Tools for Businesses" and "Tools for Specialists":

1. Paperless office paper reduction guide
2. Case studies
3. Cost of paper calculator
4. Assessment opportunities worksheet
5. Sample paper reduction policies
6. Sample memo or email notification
7. Poster templates
8. Sticker templates
9. Email reminder and campaign templates
10. Progress reports or sample text to communicate reduction successes
11. Office paper reduction tracking sheet.

Request for Proposals - Informal (RFP 12-2040)

C. General guidelines are as follows:

1. Create tools in a format that is “technologically flexible” and will have the ability to transform from a resource link on the RAW website to an interactive website where there is the potential for three-way communication, i.e. B2B, B2RAW, RAW2B.
2. Ensure the tools are user-friendly and relatively easy to implement by businesses or with basic assistance of Recycling Specialist
3. Develop tools that will help businesses track, understand and promote paper reduction practices in the office.
4. Integrate tools where it a) increases ease of use, and b) facilitates communication within the organization. Example: have a reporting function out of the assessment and/or calculator that could also be used to educate stakeholders while tracking success at the same time.

D. Develop tools for Businesses:

1. Resource guide similar to but shorter and more concise than Stopwaste’s Paperless Express (Alameda County, California) <http://stopwaste.org/docs/paperlessguide.pdf> which provides users with a roadmap for implementation and an overarching piece that describes to the business how to use the tools below.
2. Paper assessment tools
 - a. Assessment Opportunities Worksheet - Provides the framework and poses questions for organizations to identify and prioritize potential opportunities.
 - b. Cost of Paper Calculator - A tool to assess cost and potential savings such as money, labor, time, space, ink, and environmental impacts from managing paper differently. Provides a way to track use and packages this information in a way to easily communicate results to stakeholders.
3. Implementation tools
 - a. Case studies, sample policies, email templates,
4. Behavior/motivational tools
 - a. Interactive and fun ways to share “success” with colleagues.
 - b. Messaging around why this work is important.
 - c. Built into other tools (i.e., an automatically generated report from the Cost of Paper Calculator that a user could share with managers or other employees).
5. Built-in evaluation and tracking elements
 - a. How does the business know if their efforts are working?

E. Develop tools for Recycling Specialists:

To prepare Recycling Specialists to pilot the tools with a small group of specialists and businesses:

1. Create talking points for specialists to use when discussing tools with businesses that will motivate businesses to want to use the tools and will provide specialists with responses to common objections. (Motivations may not be directly linked to paper reduction but could be staff time, number of printers/copiers to maintain or ink cartridges, etc.)
2. Review tool with Project team so that the team is comfortable getting started.
 - a. Explore techniques for how-to approach businesses and start a conversation about waste prevention

Request for Proposals - Informal (RFP 12-2040)

- b. Understanding how the developed tools help businesses establish and meet their paper reduction goals. This can include a review of the barrier/tool spreadsheet EnviroIssues created.
- c. Review current technological solutions for businesses, prioritizing those technologies that are most widely applicable.

F. Finalize the project:

1. Lead a conversation with project team after they've had the opportunity to test the tools with 15 businesses.
2. Refine tools based on feedback from conversation with project team.
3. Develop training curriculum outline that would list the key points needing to be conveyed in a training of all RAW specialists.

Project Timeline:

Metro anticipates the project will begin at the end of February 2012. Tools will need to be developed by the beginning of April to ensure time for testing and finalization by mid-June 2012.

Project Budget:

The total project budget for tool development and pilot is \$20,000.

IV. QUALIFICATIONS/EXPERIENCE

Proposers shall have experience in the following areas:

1. Software and web-based tool development.
2. Knowledge of community based social marketing methodology.
3. Ability to gain consensus with multiple stakeholders.
4. Knowledge of paper reduction concepts and techniques.

V. PROJECT ADMINISTRATION

Will Elder is the project manager for Metro. Proposer shall identify one point of contact for the resulting contract.

Project Team:

Metro Staff oversees the design and implementation process. Will Elder is the primary point of contact and project manager for the campaign. Co-manager, Alison Cable is also responsible for aspects of the project. Metro staff will manage the project scope, timeline, budget, quality, change, human resources, stakeholder input, communications, risk minimization, and procurement.

Project Team makes decisions associated with the project that are essential to ensuring on-time delivery of the project outputs and the attainment of project outcomes. The Project Team consists of members of Metro's Business Recovery Work Group (BRWG) including representatives from Clackamas County and the cities of Gresham and Portland. Metro's project manager provides information to the Project Team on the status of the project, including any problems or issues that require their decision. The Project Team will provide progress updates to BRWG.

BRWG provides input on the design and implementation process and implementing project deliverables

Request for Proposals - Informal (RFP 12-2040)

VI. PROPOSAL INSTRUCTIONS

A. Submission of Proposals

One copy of the proposal shall be mailed or hand-delivered to Metro, addressed to:
Metro Sustainability Department
Attention: Will Elder RFP 12-2040
600 NE Grand Avenue
Portland, OR 97232-2736

Proposals can also be faxed or emailed to the following:
503-797-1795 Fax
will.elder@oregonmetro.gov

B. Deadline

Proposals will not be considered if received after the date and time indicated on the RFP cover page.

C. RFP as Basis for Proposals:

This Request for Proposals 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 Will Elder, will.elder@oregonmetro.gov. Any questions, which in the opinion of Metro, warrant a written reply or RFP addendum will be furnished to all parties receiving this RFP. Metro may not respond to questions received after 3:00 p.m. on February 7th, 2012.

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

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, OR 97232, 503-797-1648.

VII. PROPOSAL CONTENTS

The proposal should contain no more than ten (10) pages of written material (excluding biographies, resumes 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.

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.

Request for Proposals - Informal (RFP 12-2040)

- 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-to-day direction and internal management of the consultant effort.

- 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.
- 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.
- F. Diversity in Employment and Contracting:
- Work Force Diversity – Describe your work force demographics (number of employees, race and gender) and the measurable steps taken to ensure a diverse work force, including company policies and practices that promote the hiring and retention of women and ethnic minorities.
 - Diversity in Contracting – Describe your history of working with diverse firms, including any MWESB-certified firms. Describe a project for which you worked with minorities, women or emerging small businesses. Please provide the project name, method used to achieve participation – for example, joint ventures, subcontracts or purchase of equipment or supplies from a certified firm – and the dollar amount or percentage of the project budget expended on such participation.
 - Diversity of Firm – Describe the ownership of your firm and whether or not your firm is certified by the State of Oregon as an MBE, WBE or ESB. Provide certification number, if applicable.
- G. Exceptions to Standard Agreement and RFP: Carefully review the Standard Agreement attached hereto as Exhibit A and incorporated herein. This is the standard agreement that successful respondents to this RFP will be required to execute. RFP respondents wishing to propose any exceptions or alternative clauses to the agreement or to any specified criteria within this RFP must propose those exceptions or alternative clauses in their Proposal; Metro shall not be required to consider contract revisions proposed during contract negotiation and award. Proposed exceptions or alternative clauses should be accompanied by explanatory comments that are succinct, thorough and clear.

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. Payment shall be made by Metro on a Net 30 day basis upon approval of Contractor invoice.

Request for Proposals - Informal (RFP 12-2040)

- 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.

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. Award shall be made to the highest ranked Proposer based on the stated evaluation criteria. In the event negotiations are unsuccessful, Metro reserves the right to negotiate with the next highest ranked firms.
- 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	15
2.	Performance methodology	15
—	Project Staffing Experience	
1.	Project consultant	15
2.	Commitment to project	10
—	Diversity in Employment and Contracting	
1.	Diversity in the workforce	5
2.	Diversity in contracting	5
3.	Diversity of firm	5
—	Budget/Cost Proposal	
1.	Projected cost/benefit of proposed work plan/approach	30
		100%

X. NOTICE TO ALL PROPOSERS -- STANDARD AGREEMENT

The attached agreement included herein reflects preliminary, draft contract language and selected, proposed contract terms for this procurement. Proposers should be aware that such language terms and provisions are for illustrative purposes only and that Metro reserves the right, following submission and ranking of all proposals submitted in response to this procurement, to amend, modify or negotiate over any and all such contract



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

Request for Proposals - Informal (RFP 12-2040)

language, terms and provisions regarding the agreement arising from this procurement. By submitting a proposal in response to this procurement, proposers acknowledge that they are aware of and do not object to any later, potential amendment and modification of such preliminary, draft language and terms. In addition, by responding to this procurement, proposers acknowledge that they are aware of their ability to offer alternatives to any of the preliminary, draft contract language and proposed contract terms set forth herein.



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

Request for Proposals - Informal (RFP 12-2040)

For Personal Services up to \$50,000

Metro Contract No. XXXXXX

THIS AGREEMENT is between 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, OR 97232-2736, and **Company Name**, referred to herein as "Contractor," located at **address, City, State Zip**.

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 **Month XX, 201X** and shall remain in effect until and including **Month XX, 201X**, unless terminated or extended as provided in this Agreement. **IF CONTRACT IS SUBJECT TO RENEWAL OR EXTENSION, INCLUDE SUCH LANGUAGE i.e. This agreement may be renewed or extended for XX additional one-year periods at Metro's sole discretion.**

2. **Scope of Work.** Contractor shall provide all services and materials specified in the attached "Attachment A -- Scope of Work," 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. To the extent that the Scope of Work contains additional contract provisions or waives any provision in the body of this Agreement, the Scope of Work shall control.

3. **Payment.** Metro shall pay Contractor for services performed and materials delivered in the amount(s), manner and at the time(s) specified in the Scope of Work for a maximum sum not to exceed **XXXXXXXXXXXXXXXXXX** AND **XX/100THS DOLLARS (\$XXXXXX.XX)**. Payment shall be made by Metro on a Net 30 day basis upon approval of Contractor invoice.

4. **Insurance.** Contractor shall purchase and maintain at the Contractor's expense, the following types of insurance, covering the Contractor, its employees, and agents:

- (a) The most recently approved ISO (Insurance Services Office) Commercial General Liability policy, or its equivalent, written on an occurrence basis, with limits not less than \$1,000,000 per occurrence and \$1,000,000 aggregate. The policy will include coverage for bodily injury, property damage, personal injury, contractual liability, premises and products/completed operations. Contractor's coverage will be primary as respects Metro;
- (b) Automobile insurance with coverage for bodily injury and property damage and with limits not less than minimum of \$1,000,000 per occurrence;
- (c) Workers' Compensation insurance meeting Oregon statutory requirements including Employer's Liability with limits not less than \$500,000 per accident or disease; and
- (d) If required by the Scope of Work, Professional Liability Insurance, with limits of not less than \$1,000,000 per occurrence, covering personal injury and property damage arising from errors, omissions or malpractice.

Metro, its elected officials, departments, employees, and agents shall be named as ADDITIONAL INSUREDS on Commercial General Liability and Automobile policies.

Contractor shall provide to Metro 30 days notice of any material change or policy cancellation.

Contractor shall provide Metro with a Certificate of Insurance complying with this article upon return of the Contractor signed agreement to Metro.

5. **Indemnification.** Contractor shall indemnify and hold Metro, its agents, employees and elected officials harmless from any and all claims, demands, damages, actions, losses and expenses, including attorney's fees, arising out of or in any way connected with its performance of this Agreement, or with any patent infringement or copyright claims arising out of the use of Contractor's designs or other materials by Metro and for any claims or disputes involving subcontractors.

6. **Maintenance of Records.** Contractor shall maintain all of its records relating to the Scope of Work on a generally recognized accounting basis and allow Metro the opportunity to inspect and/or copy such records at a convenient place

Request for Proposals - Informal (RFP 12-2040)

during normal business hours. All required records shall be maintained by Contractor for six years after Metro makes final payment and all other pending matters are closed.

7. Ownership of Documents. All documents of any nature including, but not limited to, reports, drawings, works of art and photographs, produced by Contractor pursuant to this Agreement are the property of Metro, and it is agreed by the parties that such documents are works made for hire. Contractor hereby conveys, transfers, and grants to Metro all rights of reproduction and the copyright to all such documents.

8. Project Information. Contractor shall share all project information and fully cooperate with Metro, informing Metro of all aspects of the project including actual or potential problems or defects. Contractor shall abstain from releasing any information or project news without the prior and specific written approval of Metro.

9. Independent Contractor Status. Contractor shall be an independent contractor for all purposes and shall be entitled only to the compensation provided for in this Agreement. Under no circumstances shall Contractor be considered an employee of Metro. Contractor shall provide all tools or equipment necessary to carry out this Agreement, and shall exercise complete control in achieving the results specified in the Scope of Work. Contractor is solely responsible for its performance under this Agreement and the quality of its work; for obtaining and maintaining all licenses and certifications necessary to carry out this Agreement; for payment of any fees, taxes, royalties, or other expenses necessary to complete the work except as otherwise specified in the Scope of Work; and for meeting all other requirements of law in carrying out this Agreement. Contractor shall identify and certify tax status and identification number through execution of IRS form W-9 prior to submitting any request for payment to Metro.

10. Right to Withhold Payments. Metro shall have the right to withhold from payments due to 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.

11. State and Federal Law Constraints. Both parties shall comply with the public contracting provisions of ORS chapters 279A, 279B and 279C and the recycling provisions of ORS 279B.025 to the extent those provisions apply to this Agreement. All such provisions required to be included in this Agreement are incorporated herein by reference. Contractor shall comply with all applicable requirements of federal and state civil rights and rehabilitation statutes, rules and regulations including those of the Americans with Disabilities Act.

12. Situs. The situs of this Agreement is Portland, Oregon. Any litigation over this agreement shall be governed by the laws of the State of Oregon and shall be conducted in the Circuit Court of the state of Oregon for Multnomah County, or, if jurisdiction is proper, in the U.S. District Court for the District of Oregon.

13. Assignment. This Agreement is binding on each party, its successors, assigns, and legal representatives and may not, under any circumstance, be assigned or transferred by either party without Metro's written consent.

14. Termination. This Agreement may be terminated by mutual consent of the parties. In addition, Metro may terminate this Agreement by giving Contractor seven (7) days prior written notice of intent to terminate, without waiving any claims or remedies it may have against Contractor. Termination shall not excuse payment for expenses properly incurred prior to notice of termination, but neither party shall be liable for indirect or consequential damages arising from termination under this section.

15. No Waiver of Claims. The failure to enforce any provision of this Agreement shall not constitute a waiver by Metro of that or any other provision.

16. Modification. Notwithstanding and succeeding any and all prior agreement(s) or practice(s), this Agreement constitutes the entire Agreement between the parties, and may only be expressly modified in writing(s), signed by both parties.



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

Request for Proposals - Informal (RFP 12-2040)

CONTRACTOR

By _____

Print Name _____

Date _____

METRO

By _____

Print Name _____

Date _____

Request for Proposals - Informal (RFP 12-2040)

Metro Contract No. XXXXXX

1. **Purpose and Goal of Work**

2. **Description of the Scope of Work**

3. **Deliverables/Outcomes**

4. **Payment and Billing**

Contractor shall perform the above work for a maximum price not to exceed XXXXXXXX AND XX/100TH DOLLARS (\$XXXXXX.XX).

INCLUDE HOURLY RATES OR TASK BASED PAYMENTS IF APPLICABLE

The maximum price includes all fees, costs and expenses of whatever nature. Each of Metro's payments to Contractor shall equal the percentage of the work Contractor accomplished during the billing period. Contractor's billing invoices will include an itemized statement of work done and expenses incurred during the billing period, will not be submitted more frequently than once a month, and will be sent to Metro, Attention: Accounts Payable, 600 NE Grand Avenue, Portland, OR 97232-2736. Payment shall be made by Metro on a Net 30 day basis upon approval of Contractor invoice.