



Oregon Zoo Website

RFP 12-1931

Metro Information Services Department

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

Project Manager

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Procurement Analyst

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Notice is hereby given that proposals for RFP 12-1931 for Oregon Zoo Website shall be received by Metro, 600 NE Grand Avenue, Portland OR 97232 until close of business on July 8, 2011. 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 condition.

Request for Proposals (RFP 12-1931)

I. INTRODUCTION

The Information Services 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 Oregon Zoo Website. 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

The Oregon Zoo Website (www.oregonzoo.org) is currently built using Dreamweaver. The site has been maintained in-house using html code modifications. In January 2011 Metro made the decision to move to a centrally managed CMS after going through an extensive selection process. The decision was made to move Metro websites to Drupal. The Oregon Zoo Website is one of two Metro websites that is moving to the centrally managed CMS this year. Metro plans to house its sites in a single core environment with multiple site nodes.

Goals

The goal for the Oregon Zoo Website is to rebuild the appearance so it invites visitors to the zoo and teaches and informs about animals, habitat and conservation. The new website will also engage members, donors, sponsors, volunteers and partners and it will inspire people to care about the future of wildlife. The following goals are inherent in the process:

- An innovative, welcoming and modern design with user navigation and experience in mind.
- Robust back-end infrastructure with opportunities for future updates
- Improved public on-line presence and effectiveness
- Complete search engine optimization with baseline before and after comparatives
- Accessible content management system utilizing Drupal for Zoo/Metro staff. Ability to modify text, photos, placement, links, videos, other media and font alternatives, colors
- Integration of Social Media sites both current (MySpace, Facebook, Twitter) and future
- Improved calendar of event functionality
- Strong metric capabilities – Google Analytics or related
- Continuity of design and navigation of the website regardless of page count
- Adherence to deliverable timelines, project budget and review process approvals
- Clear concise communication of project changes or modifications as they relate to both deliverable timelines and project budget
- Search engine optimization
- Development of Google Ad Words or related web campaign drivers

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III. PROPOSED SCOPE OF WORK/SCHEDULE

Metro is seeking proposals from qualified firms to perform the following services and to deliver the products described: consultants and specialists to act as a creative partner through the design and development process of the Oregon Zoo Website. The qualified firm, consultant or specialist will perform the following services and deliver the products described:

Consultant will:

- A. Collaborate with Zoo and Metro Staff to create a test site address for review of future designs and applications. No less than three (3) varied website designs will be created based upon discoveries and input by Metro project team. The process will be collaborative and there will be an initial design check-in and review with the Steering Committee before proceeding with prototype concepts and designs. The three designs will be uploaded for access and reviewed remotely.
- B. Work with Zoo and Metro staff utilizing the discoveries and information architecture created prior to working with the consultant to finalize no less than three (3) varied website designs that meet the goals and needs. There will be a final check-in with the project team before a formal presentation of varied designs and options. The prototypes will go through a full and thorough testing process for all applications and features noted as significant by the design team and Metro project team. There will be a final review for grammar and spelling prior to presentations followed by the formal presentation of no less than three (3) design options for the review and understanding by Zoo Website Steering Committee. Final designs will be clearly dated and available for continued review for up to 2 weeks following the meeting.
- C. The Zoo Website Steering Committee will select the final design and express any additional requests within the proposed final design. There is a possibility there may be the request to blend the best elements of each. Where possible, these shared concepts – when advancing the overall goals expressed, will be advantaged. In this instance, one more formal review would take place prior to deployment. The final design will be deployed for final “live” website design and have complete testing and review of “live” website. Immediate repair/replacement of any agreed upon elements not working properly will take place. Prior to deployment there will be initial training and follow-up will be scheduled with key Zoo/Metro staff involved in updating, review and maintenance of the Oregon Zoo Website by way of the Drupal content management system.
- D. Collaborate and assist Zoo and Metro staff on troubleshooting issues or concerns related to the completed website design, CMS and/or related problems on an as-needed basis.

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Deliverables

- A. Test website for review and collaboration
- B. A minimum of three (3) creative design options that meet the goals
- C. Initial review process and meeting prior to formal/larger presentation
- D. Upload of three (3) designs noted by date
- E. A minimum of three (3) final creative design options that meet the goals
- F. One more check-in with the project team prior to formal presentation
- G. Collaborative presentation of final designs for review and understanding by the Zoo Website Steering Committee
- H. Provide a demonstration of functionality and testing methods applied
- I. Final design option, reviewed and completed
- J. Deployment of new "live" website
- K. Testing of new "live" website
- L. Complete training of Zoo/Metro staff on the Drupal Content Management System (CMS).
- M. Final meeting and review of newly designed website
- N. Ongoing technical support
- O. Search Engine Optimization
- P. Assistance and advisement on new and emerging technologies
- Q. Provide demonstrated performance under target loads
- R. Provide overview of configuration management for multi-site environment (development-stageing-production)

Management Services

The vendor shall:

- Provide Metro with updated documentation, procedures and a graphical site map representing the new website. Such materials shall be provided in a hard copy set of master manuals as well as electronic (in printable, automated or downloadable formats). These materials shall be tested and utilized to assist and provide training to Metro and Zoo personnel to effectively develop, maintain and update content.
- Provide training on-site and train the trainer sessions for on-site administrators.
- Provide a variety of technical support options.
- Agree that the content of Oregon Zoo's website will remain the sole property of Zoo/METRO.

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The System shall:

- Be able to authenticate users using Active Directory
- Be fully configured for workflow and content submission and approval using role-based security.
- Have analytical/user reports available to provide key data measures of website usage.

IV. QUALIFICATIONS/EXPERIENCE

Proposers shall have the following experience:

- Web design skills, understanding of layout, type and color
- Expert information architecture
- Proficiency in Drupal 7.0 CMS
- Understanding of web standards and accessibility guidelines
- Ability to understand and implement Associated Press editorial and Metro graphic design standards

V. PROJECT ADMINISTRATION

Metro's project manager, Amy Padilla, will administer the project. Proposer shall indicate one point of contact for the resulting contract. All work products provided under the contract are subject to the project manager's approval, including all invoices. Metro will make payment 30 days from date of invoice after authorization by project manager. Invoice is to include detailed summary of all work done for which the invoice is submitted. Final payment shall be made 30 days following final user acceptance by Web Steering Committee.

VI. PROPOSAL INSTRUCTIONS

A. Submission of Sealed Proposals

3 copies of the proposal shall be furnished to Metro in a sealed envelope, addressed to:

Metro Procurement Services
Attn: Amy Padilla RFP 12-1931
600 NE Grand Avenue
Portland, OR 97232-2736

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 Amy Padilla, amy.padilla@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 will not respond to questions received after 3:00 pm on July 5, 2011.

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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 20 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, folders, binders 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.

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 sub-consultant 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.

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- 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 sub-consultant 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: Sustainable Business Practices
- Economy: Describe your business practices to reduce environmental impacts of your operations. This may include energy efficiency, use of non-toxic products, alternative fuel vehicles, waste prevention and recycling, water conservation, green building practices, etc.
 - Environment: Describe your support of local businesses and markets within the Portland Metro region. Include what steps your company has taken in the past to support local businesses, and what steps would be taken if selected for this project.
 - Community: Describe the employee compensation structure of your organization. Include wage scales for employees, including trainee, probationary, entry level, journey level, and supervisory. Also include policies regarding annual cost of living adjustments (COLA) to employee wages. Details of the healthcare program (including, medical, dental, prescriptions, preventive care, etc.) as well as out of pocket and deductibles, and employee contributions for themselves and family members. All other employee benefits are to be including, such as vacation, sick leave, pension, disability insurance, profit sharing, childcare, health memberships, company vehicle, public transportation, etc.
- H. 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.

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- 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.
- 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 firm(s). Award will be made to the highest ranked Proposer according to the evaluation criteria. If contract negotiations are unsuccessful with the highest ranked firm, Metro reserves the right to enter into negotiations with the next highest ranked Proposer.
- 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.

C.

| | Percentage of Total Score |
|---|---------------------------|
| Project Work Plan/Approach | |
| 1. Demonstration of understanding of the project objectives | 15 |
| 2. Performance methodology | 10 |
| Project Staffing Experience | |
| 1. Project consultant | 10 |

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| | | |
|--------------------------------|---|------|
| 2. | Commitment to project | 20 |
| Budget/Cost Proposal | | |
| 1. | Projected cost/benefit of proposed work plan/approach | 15 |
| 2. | Commitment to budget and schedule parameters | 15 |
| Diversity | | |
| 1. | Work Force Diversity | 10 |
| 2. | Diversity in Contracting | |
| 3. | Diversity of Firm | |
| Sustainable Business Practices | | |
| 1. | Environmental Impact | 5 |
| 2. | Support of local business and markets | |
| 3. | Employee compensation structure | |
| | | 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 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 language, terms and provisions before making a final determination regarding the issuance of the Notice of Intent to Award 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
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SAMPLE OF PERSONAL SERVICES AGREEMENT:

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.

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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 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.



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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.

CONTRACTOR

METRO

By_____

By_____

Print Name_____

Print Name_____

Date_____

Date_____