

Request for Qualifications to Host & Administer the Greater Portland Pulse (GPP)

RFQ No. 12-9214

Proposals due November 21, 2011

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Notice is hereby given that proposals for RFQ 12-9214 to Host and Administer the Greater Portland Pulse (GPP) must be received by Metro, 600 NE Grand Avenue, Portland OR 97232 by close of business on November 21, 2011. 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 or delivered. Faxed or emailed proposals will not be accepted. Proposers shall review all instructions and contract terms and conditions.



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Metro and the Institute of Portland Metropolitan Studies at Portland State University seek an organization in the greater Portland region willing and able to host and administer Greater Portland Pulse project (“Greater Portland Pulse” or “GPP”) for an initial three to five year operational phase. Background on the program and details on the required qualifications and RFQ process are set forth below.

I. Background

Vision and mission

The Greater Portland Pulse vision is that a widening network of partners across the region use GPP data plus dialogue to enhance awareness, alignment and action for better results.

The Greater Portland Pulse mission is, therefore, two-fold: 1) to measure results (data) and 2) to inspire action (dialogue and engagement).

1. To measure results (data); to collect, store, standardize, and provide guidance on and access to data for carefully selected regional indicators in compelling online visual displays such as charts and maps, in downloadable data files and through analyses on emerging trends and issues. This includes online access to region-wide summary data, and where possible, to national and international comparisons, plus drill-down to local geographies and jurisdictions. All data and products shall be developed in a neutral and rigorous fashion to tell a candid story of how we are doing as a metropolitan region – good news and bad.
2. To inspire action (dialogue and engagement); to engage leaders, align partners, inspire action and increase the general awareness of how the greater Portland region is doing. This part of the mission brings people into the equation. It is about collaboration, learning and intelligent action inspired conversations that matter with people who care and who make decisions.

Start-up Advisory Team

Co-Chairs

Wim Wiewel, President, Portland State University

Gale Castillo, President, Hispanic Metropolitan Chamber

Members

Gail Achterman - Chair, Oregon Transportation Commission

Sam Adams, Mayor, City of Portland

Thomas Aschenbrener, President, Northwest Health Foundation

Jay Bloom, Interim Executive Director, United Way of the Columbia-Willamette

Rex Burkholder, Metro Councilor, District 5

Jeff Cogen, Chair, Multnomah County Commission

Paul Dennis, Mayor, City of Camas

Denny Doyle, Mayor, City of Beaverton

Josh Fuhrer, Councilor, City of Gresham

Jack Hoffman, Mayor, City of Lake Oswego

Mike Houck, Executive Director, Urban Greenspaces Institute

Nichole Maher, Executive Director, Native American Youth and Family Center

Pamela Morgan, President, Graceful Systems

Marcus Mundy, President and CEO, Urban League of Portland

Joseph Santos-Lyons, Board Member, Asian Pacific American Network of Oregon

Bill Scott, General Manager, Zipcar Portland

Steve Stuart, Chair, Clark County Commission

Lynn Valenter, Acting Chancellor, Washington State University-Vancouver

Bill Wyatt, Executive Director, Port of Portland

David Wynde, Vice President and Manager of Community Relations, U.S. Bank

July 2011

Start-up phase

During the 2010 and 2011 start-up phase, Portland State University, Metro and more than 200 volunteers from 100 organizations worked to choose and measure 72 regional indicators of progress in nine inter-connected areas: economy, education, health, safety, arts, civic engagement, housing, transportation and natural environment. For purposes of this Project, the greater Portland region is defined as Clark, Clackamas, Multnomah and Washington Counties.

The products of these efforts were released in late July. The first Greater Portland Pulse report, [*The Path to Economic Prosperity: Equity and the Education Imperative*](#), and the recently launched portlandpulse.org show, for the first time, a holistic view of where the whole region and its jurisdictions are successful and where they are lagging behind; where there's progress and where there's work to be done.

Metro and PSU's Institute of Portland Metropolitan Studies (IMS) split the \$600,000 price tag for the start-up phase. In addition to the financial support of PSU and Metro, this project was made possible by the generous efforts of the 200 volunteer experts, including a high-level Advisory Team, an Equity Panel and policy and data professionals in the nine topics from throughout the four-county region.

II. Operational phase: the focus of this RFQ

The administration and continued viability of the Greater Portland Pulse project's next phase is the focus of this RFQ. The data and website functions will remain at PSU's Institute of Portland Metropolitan Studies (IMS), working under contract with Greater Portland Pulse project's host/administrative agency. The dialogue, engagement and reporting functions will move to a host agency selected by the Greater Portland Pulse Advisory Team. Once selected, the successful agency:

1. Will agree to enter into a Memorandum of Understanding with PSU and/or Metro, on behalf of the Advisory Team, as appropriate to carry out the responsibilities outlined in this RFQ;
2. May also be expected to enter into contracts or Intergovernmental Agreements (IGAs) with multiple private and public funding partners to maintain operations for three to five years.

Estimated costs for the upcoming three to five years of operations are \$521,000 per year: \$166,000 in contract costs for maintaining the data and the website; \$355,000 for reporting, carrying and maintaining the brand and encouraging coordinated action around key data trends of concern to partners and stakeholders.

The GPP (previously "GPVI") [business plan](#) was based on the principal that regional indicators will serve the greater good. It targeted 50 percent of the cost to come from the public sector; 20 percent from foundations; 15 percent from colleges and universities; and 15 percent from the business sector. Metro and PSU are currently leading the fundraising effort to cover the remainder of FY 2011-12 and for FY 2012-13; and will continue to work with the successful host/administrative agency to garner commitments for the full three to five year period. **Greater Portland Pulse's host/administrative agency will be responsible for taking the lead on continued collaborative efforts to raise and maintain needed revenue for the program.**

Responsibilities of the program host/administrative agency

During the operational phase, the host/administrative agency will be responsible for the following:

1. Subcontract with the Institute of Portland Metropolitan Studies (IMS) at PSU to maintain the Greater Portland Pulse data and website, and collaborate with IMS on custom data studies and reports (customer contracts) where appropriate.
2. Provide administrative and fiduciary oversight through the host/administrative agency's governing body.
3. Provide salary, space, equipment and administrative overhead necessary to support a full time project director and (as resources become available) a communications /outreach staff person.

The Program director should have skills and experience in:

- Community indicator systems or performance management
- Program and project management
- Authoring reports, studies and analyses based on data and group processes
- Using system thinking principles
- Saliently communicating complex issues
- Public presentations; meeting and committee organization and facilitation
- Engaging partners and stakeholders in meaningful dialogue
- Master's degree or higher in a related field; experience will be considered in lieu of master's

The Communications/outreach specialist should have skills and experience in:

- Relationship building
 - Meeting logistics for multiple meetings and large events
 - Organizing and keeping current a large email list for shared use
 - Basecamp or other project management software
 - Website maintenance
 - Social and earned media (preferred)
 - Bachelor's degree or higher
4. Leverage the host and administering agency's community connections for outreach and engagement to further the mission of the GPP Project.
 5. Model the use of Greater Portland data in internal strategic planning processes and decisions.
 6. Consider funding part of the cost of Greater Portland Pulse dialogue/engagement work, perhaps through in-kind contributions as well as funding.
 7. Engage in and support fundraising for continued viability of the Greater Portland Pulse project.
 8. Support GPP staff in providing deliverables that establish the continued viability and vitality of the GPP project, consistent with the work plan framework approved by the GPP Advisory Board.
 9. Other efforts as may be agreed to by the parties in the contract.

III. Responding to the RFQ

Criteria for evaluating qualifications

The following are criteria by which qualifications will be evaluated, and were developed with the guidance of the start-up Advisory Team:

1. **Compatibility:** the organization's mission is compatible with the mission of Greater Portland Pulse, which is to measure results and inspire action.
2. **Intellectual alignment:** the organization appreciates the deeper significance of indicator work, which is to use sound, trustworthy data to inspire coordinated action for improved results.
3. **Geography:** geographic scope compatible with the project (Washington, Multnomah, Clackamas and Clark counties)
4. **Equity:** commitment to equity and other values in the project
5. **Governance:** willing and able to serve as fiduciary agent and administrative overseer of the GPP program and its board.
6. **Neutrality:** willing and able to honor the need for the GPP advisory board to be able to independently choose, measure, grade and report data without bias – good news and bad – taking into consideration collaborative input from stakeholders and the community.
7. **Convening:** willing and able to help bring together various groups in the community around the indicators and data
8. **Rigor:** willing and able to leverage existing data, infrastructure and research capacity at PSU's Institute of Portland Metropolitan Studies.
9. **Stability:** the organization has a demonstrated ability to support and maintain the Greater Portland Pulse for the long term.
10. **Eligibility:** the organization has the legal and administrative ability to receive and spend public funds.

What to include in the RFQ response

The response should contain no more than 10 pages of written material (excluding biographies and brochures, which may be included in an appendix), describing the qualifications of the organization to host and administer Greater Portland Pulse. 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.

The Proposal shall be organized and presented in the following manner and format:

1. **Transmittal letter**

The letter of transmittal shall contain the identification of your organization, including business name, tax identification number, address and telephone number; and the name, title, address, telephone number, fax number and e-mail address of the designated contact person. It shall also include a statement that your organization meets all qualifications set forth in this RFQ and that it shall remain valid for a period of not fewer than 90 days from the due date of the RFQ.

2. Qualifications

- Describe in detail how your organization meets each of the criteria set forth above (“Criteria for evaluating qualifications”).

3. Governance and staffing

- Describe, generally, how your agency forms boards and committees, and selects contractors, subcontractors and employees.
- Describe, specifically, how your agency will help create and then incorporate the Greater Portland Pulse Advisory Board
- Describe, specifically, how your agency will work with the Greater Portland Pulse Advisory Board to select and hire the Greater Portland Pulse program director

4. Accountability

Describe how your organization will work with the Greater Portland Pulse Advisory Board to evaluate the success of Greater Portland Pulse. (Once reviewed and approved by the newly formed Advisory Board, the work plan framework and annual work cycle shown in Attachments 1 and 2 will guide the Greater Portland Pulse program director in developing a more detailed, time-framed list of deliverables, strategies and tasks.)

5. 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.

6. Deadline and where to submit

Sealed responses are due November 21, 2011 and should be submitted to Metro, Attention: Julie Hoffman, CPPB, 600 NE Grand, Portland, OR 97232. In addition to the sealed responses, electronic copies may also be submitted to Rita Conrad, Project Manager, at rita.conrad@oregonmetro.gov.

7. Other Information

Provide any other information that you believe will be helpful in evaluating your response.

Evaluation of RFQ responses

A qualified selection committee will evaluate the responses based upon the criteria listed in the RFQ and make recommendations to the GPP Advisory Team. Metro makes no guarantee as to selecting the host/administering agency and shall not be responsible for any costs associated with preparing a response to the RFQ. All responses shall be evaluated by Metro, who reserves the right to conduct oral interviews and reference checks prior to making a final selection.

Appeal of contract award

Aggrieved respondents who wish to appeal the selection of the host/administering agency in response to the RFQ must do so in writing within seven (7) days of issuance of Metro's notice of intent to award. 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 selection process. Disagreement with the judgment exercised in scoring by the committee is not a basis for appeal.

Form of contract

Metro reserves the right to negotiate the form of agreement with the selected respondent, which is subject to the approval of the Office of the Metro Attorney. If Metro is unable to reach an agreement with the selected respondent, the agency reserves the right to enter into negotiations with the next highest ranked party.

Attachment 1: Work plan framework for Greater Portland Pulse

Measure results, inspire action = mission

Plan, do, communicate = high-level work streams

Articulation of desired and actual outcomes, awareness, alignment and action = work plan goals

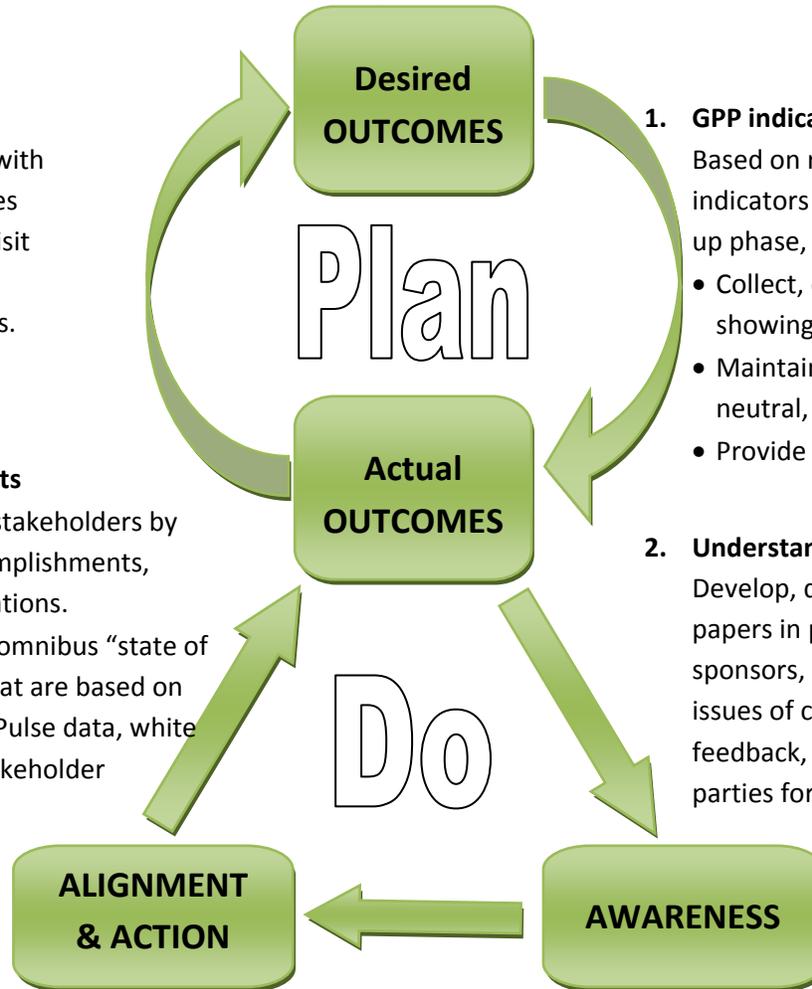
Items 1-6 = work plan objectives and possible strategies

5. Relevance check

Every 5-10 years, work with the region's communities and stakeholders to revisit and update the desired outcomes and indicators.

4. Report action and results

- Periodically convene stakeholders by topic to identify accomplishments, challenges and innovations.
- Periodically produce, omnibus "state of the region" reports that are based on what is learned from Pulse data, white paper process and stakeholder dialogues.



1. GPP indicator data (PSU/IMS)

Based on regional outcomes and indicators developed during the start-up phase,

- Collect, calculate and graph data showing progress toward outcomes
- Maintain portlandpulse.org as a neutral, trusted data source
- Provide custom data and research

2. Understand GPP data

Develop, distribute and present white papers in partnership with community sponsors, who help define trends and issues of concern to them, provide feedback, and convene interested parties for presentation and dialogue.

3. Increase use of data by community partners

Help community partners leverage GPP indicators as a learning utility in priority setting, strategic planning and program evaluation, and as a tool in communicating to constituencies how their organization contributes to desired regional outcomes. Help funders (foundations, elected policy makers) encourage grant applicants and budget requesters to use "GPP impact analyses" to document the importance of their programs in achieving desired regional outcomes. Refine GPP products and services to help users address their internal data challenges.

Communicate

6. Education and outreach

Engage citizens via public events, media and outreach

