



OREGON CHILD DEVELOPMENT COALITION

REQUEST FOR QUALIFICATIONS AND QUOTATIONS (RFQQ)

For

SHAREPOINT CONSULTING SERVICES

CONTACT: Nancy.Orem@ocdc.net

1. INTRODUCTION

The Oregon Child Development Coalition (OCDC) is initiating this Request for Qualifications and Quotations (RFQQ) to solicit responses from individuals or firms capable of providing consulting services to upgrade and customize the agency's SharePoint platform, for improved user adoption and system effectiveness. OCDC currently operates using on-premises SharePoint Server 2010 with standard client licenses.

It is OCDC's intent to establish one or more professional services agreements with qualified contractors selected through this RFQQ. OCDC reserves the right to award any number of contracts it deems necessary.

Note: To be clear, this is not a Request for Proposals (RFP), and, thus, OCDC is not currently seeking proposals for any specific project or projects.

2. SCOPE OF SERVICES

Respondents selected through this RFQQ will be expected to provide various SharePoint application design, implementation, and roll-out services. Scope of Services may include, but are not limited to:

- a. Developing and implementing needs assessment and systems analysis processes.
- b. Analyzing readiness for and appropriateness of upgrading from SharePoint 2010 to a more current on-premises or cloud-based SharePoint version.
- c. Evaluating the current information architecture and recommending improvements, including changes to content types, use of managed properties, information management plans, and inter-site and mobile navigation.
- d. Assessing logical and physical architecture and planning improvements to installations as needed for system reliability, long-term management, and user experience.
- e. Reviewing current security at the platform and farm levels as well as at the site and site collection levels, proposing updates to configurations as necessary.
- f. Guiding the use of social features for improved integration, information sharing, and collaboration.
- g. Developing and implementing SharePoint-based applications and services integration.
- h. Providing guidance on any customizations that OCDC identifies during assessment and analysis processes.

- i. Evaluating and recommending improvements to OCDC’s search taxonomy and other advanced search setup, customizations (as required), server and storage infrastructure requirements, and system optimizations.
- j. Using .Net, API, JavaScript/JQuery, and other tools to implement custom solutions.
- k. Customizing templates, master pages, page layouts, CSS and other components to improve usability.
- l. Addressing issues that arise with the deliverables, including expanding on requirements that were not initially identified or that become apparent as business needs and processes evolve.
- m. Collaborating with Information Technology and Training and Professional Development Teams to develop SharePoint training for system stakeholders.

3. TIMELINE*

Request for Qualifications and Quotations issued	10/18/2017
RFQQ Questions Deadline	10/25/2017 (1:00 p.m. PDT)
RFQQ Answers and Clarifications available by email request	11/1/2017
Responses Deadline	11/28/2017 (1:00 p.m. PDT)
Pre-Qualification notification(s)	12/20/2017

*OCDC reserves the right to modify this timeline.

4. STAKEHOLDER ASSISTANCE

OCDC staff will be responsible for communicating and working with interested stakeholders. However, any contractor/s will assist with stakeholder responsibilities as an integral part of any deliverable by:

- Proposing approaches for addressing and defusing any potential stakeholder concerns.
- Assisting in the preparation of informational or training materials such as overheads or handouts to be used in presentations concerning the project when requested by OCDC.
- Attending, participating, and providing expert support, if needed, in presentations and meetings with stakeholders.

5. RESPONSE SUBMISSION

A complete original Response Package (Attachment C), 2 copies thereof, and a copy in electronic format (Word or PDF) must be received no later than 1:00 p.m. Pacific Daylight Time, **November 28, 2017** at the following address:

Nancy Orem
 Training and Development Specialist
 Oregon Child Development Coalition
 9140 SW Pioneer Court, Suite E
 Wilsonville, OR 97070
 Email: Nancy.Orem@ocdc.net
 RE: SHAREPOINT CONSULTING

OCDC will not accept Responses submitted by telegraph or facsimile. OCDC is not responsible for delays or losses caused by the U.S. Postal Services or any other carrier or delivery service. Responses received after the above specified date and time will not be accepted.

6. CONTRACTOR SELECTION PROCESS

It is OCDC's intent to select for contract negotiations, pre-qualified Respondent(s) who meet OCDC's needs. Respondents selected for contract negotiations are not guaranteed a contract. This RFQQ does not in any way limit OCDC's right to solicit contracts for similar or identical services.

OCDC reserves the right to determine, in its sole and absolute discretion, whether any aspect of submittal satisfactorily meets the criteria established in this RFQQ.

OCDC reserves the right to request additional information during any phase of this evaluation process. During the evaluation process, OCDC may require the presence of Respondent's representatives to make presentations and answer specific questions. Notification of any such requirement will be given as necessary.

Evaluation Criteria

Firm and Assigned Staff Qualifications

- Relevant professional background, experience and qualifications of the individual team members and of the firm as a whole
 - Past, recently completed, or ongoing projects that substantiate respondent's experience providing services similar to those described in this RFQQ
 - Current workload, available staff & resources with capacity and flexibility to meet schedules, including any unexpected additions to project scope
 - Locally available staff capable of meeting onsite with OCDC team members
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Project Approach

- Demonstrated understanding of the nature and extent of the services required
 - A specific outline of methodology and process for how work may be performed
 - Awareness of typical project risks and effective mitigation strategies
 - Special resources the respondent offers that are relevant to the successful completion of the project
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Quality of Response

- Presentation, completeness, clarity, organization and responsiveness of the proposal
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Consulting Rates

- Degree of financial competitiveness in the consulting rates for each of the consulting roles presented

There is no numerical limit to the number of Respondents that may be pre-qualified.

OCDC RESERVES THE RIGHT NOT TO BE LIMITED TO THE LOWEST COST BID.

Upon OCDC's conclusion of its Response evaluation process, pre-qualified Respondents will be provided with a Pre-Qualification Notification. OCDC will not contact or notify Respondents which are not pre-qualified.

**RFQQ ATTACHMENT A: ACKNOWLEDGMENT OF
RFQQ TERMS AND CONDITIONS**

TERMS AND CONDITIONS

By submitting a Response, the Respondent, on behalf of itself and its Partners/Subcontractors acknowledges and agrees that:

- I. Respondent Authorization: The signatories are authorized by the Respondent to make representations for the Respondent and to obligate the Respondent to perform the commitments contained in its Response.
- II. Respondent Selection: Based on Responses received to this Request for Qualifications (RFQQ), it is the intent of OCDC to select any number of pre-qualified Respondents for contract negotiations. This RFQQ does not in any way limit OCDC's right to solicit contracts for similar or identical services, if in OCDC's sole and absolute discretion, it determines Responses received are inadequate to satisfy its needs.
- III. Economy of Preparation: Proposals should be prepared as simply and economically as possible while providing straight-forward and concise delineation of your capabilities to satisfy the requirements of the RFQQ. Fancy binding, promotional materials, etc. are neither necessary nor desired. Emphasis should be on completeness and clarity of content. In order to expedite evaluations, it is essential that specifications and instructions contained in this document be followed as closely as possible.
- IV. Proposal Status: The issuance of this Request for Qualifications (RFQQ) constitutes only an invitation to submit Responses to OCDC. It is not to be construed as an official and customary request for bids, but as a means by which OCDC can facilitate the acquisition of information related to the purchase of consultant services. Any Response, as provided herein, constitutes a desire to negotiate and recognition that the Response is not a bid and is not being submitted as part of a bid process.
- V. Contract Negotiations: It is understood that any submittal received by OCDC can be used as a basis for direct negotiation of the cost and terms of a contract between OCDC and a Respondent. OCDC reserves the right to negotiate pertinent contract terms concurrently with any number of firms as it deems in its best interest, whether or not such firm has submitted their qualifications. It is understood by Respondent that OCDC reserves the right to accept or reject any submittal, and waive any irregularities or informalities that OCDC may deem in its best interest.
- VI. No Guarantee of Work or Compensation: There is no guarantee of a minimal amount of work or compensation for any of the Respondents selected for contract negotiations.
- VII. Financial Responsibility for Response Costs: This RFQQ does not commit OCDC either to award a contract or pay for any costs incurred in the preparation of a Response. Submission of a Response as provided herein shall not obligate nor entitle a Respondent to enter into an agreement with OCDC.
- VIII. Ownership of Materials: All materials submitted become the property of OCDC and will not be returned.
- IX. Compliance with Laws and Regulations: It must comply with all applicable State, Federal, and local laws. In the event any governmental restrictions may be imposed which would necessitate alteration of the material, quality workmanship or performance of the items offered on this Response prior to their delivery, it shall be the responsibility of the successful Respondent(s) to notify OCDC at once, indicating in their letter the specific regulation which required such alterations. OCDC reserves the right to accept any such alterations, including any price adjustments occasioned thereby, or cancel the contract.

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- X. Staffing: The key individuals listed and identified in the Response will be performing the work and will not be substituted with other personnel or reassigned to another project by the Respondent/Contractor without OCDC's prior approval or request. OCDC, in its sole discretion, shall have the right to review and approve all staff assigned to provide services throughout the duration of the contracts negotiated under this RFQQ. Such approval by OCDC will not be unreasonably withheld. If selected for interviews, the Respondent's key individuals, including partner/subcontractor representatives, will be required to meet with OCDC prior to selection for contract negotiations.
- XI. Lead Role: The selected Respondent(s) will be expected to take the lead role in project management and staff coordination for identified components. This assumption should be factored into Responses.
- XII. OCDC's Terms and Conditions: Respondent is willing and able to meet all of OCDC's terms and conditions as stated in OCDC's standard professional services agreement ("Agreement") template (available by request). The form of the Agreement template is subject to revision by OCDC prior to the award of any contract.
- XIII. Addenda: OCDC reserves the right to add, change, or delete any provision of statement in this RFQQ and to request additional materials, oral discussion, or presentation in support of Responses.
- XIV. Right to Withdraw RFQQ: OCDC reserves the right to withdraw, cancel and/or amend, in part or entirely, this RFQQ for any reason and at any time with no liability to any firm for any costs or expenses incurred in connection with this RFQQ or otherwise.
- XV. Performance Standards: If awarded a contract, Respondents warrant and agree to use their best efforts to perform all services in accordance with the contract terms and in accordance with generally accepted professional standards.
- XVI. Competition: Contractor will ensure all transactions are conducted in a manner to provide, to the maximum extent practical, open and free competition.
- XVII. Term of Work Effort Estimate: Submission of a Response signifies that the proposed services are valid for two years from the date that OCDC issues a contract resulting from this RFQQ and that the quoted prices are genuine and not the result of collusion or any other anti-competitive activity.
- XVIII. Release of Liability: The Respondent hereby fully and forever releases, discharges, and covenants not to sue OCDC, Boards, officers, and employees, and any third parties who furnish information concerning Respondent's performance on prior projects, of and for any and all claims, causes of action, damage, and any other liabilities of any kind or description, in law or equity, or otherwise, related to information or comments furnished to OCDC about Respondent's performance on any other project or contract which Respondent relies upon as experience to qualify or compete for this RFQQ.
- XIX. CERTIFICATION: Each Respondent hereby certifies that it has carefully examined this RFQQ and documents attached hereto for terms, conditions, specifications, covenants, requirements, services, etc. and the Respondent certifies that it understands the services requested, that the Respondent has knowledge and expertise to provide the services submitted for consideration, and that its Response is based upon the terms, condition, specifications, services, and requirements of this RFQQ and attachments. By its signature on the Response to the RFQQ, the Respondent certifies that its Response is made without prior understanding, agreement or connection with any corporation, firm or person submitting a Response for the same services, supplies or equipment, and is in all respects, fair and without

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collusion or fraud, so that all Responses for the services will result from free, open, and competitive proposing among all vendors, in compliance with OCDC's requirements.

- XX. REFERENCE CHECKS: OCDC will check references of the top scoring bidders. OCDC reserves the right to contact references not supplied by the bidder and use the information obtained for scoring. References may include, but are not limited to, other governmental organizations and internal OCDC programs.
- XXI. ACCEPTANCE: Submission of any Response indicates a Respondent's acceptance of the conditions contained in this RFQQ unless clearly and specifically noted otherwise in the Response. OCDC may discontinue its selection, contract negotiations or contract award processes with any Respondent if it is determined that the Respondent has not accepted the RFQQ terms and conditions contained herein.

Each Respondent as part of its Response, must submit this Attachment A signed by a representative(s) authorized by the Respondent to make representations for the Respondent and to obligate the Respondent to perform the commitments contained in its Response.

Acknowledged and Agreed:

_____ Signature	_____ Signature
_____ Printed Name	_____ Printed Name
_____ Title	_____ Title
_____ Firm Name	_____ Firm Name
_____ City, State	_____ City, State
_____ Phone Number	_____ Phone Number
_____ Date	_____ Date

RFQQ ATTACHMENT B: OCDC'S ADMINISTRATIVE REQUIREMENTS

OCDC can only do business with Contractors that have fulfilled OCDC's requirements.

CONTACT

Contact Purchasing@ocdc.net for information and assistance on meeting these requirements.

FORMS AND REQUIREMENTS

Vendor information website: <http://www.ocdc.net/new-vendors/>

- I. IRS Form W-9 – establishes federal and state tax status
<http://www.irs.gov/pub/irs-pdf/fw9.pdf>
- II. Equal Employment Opportunity – OCDC is an Equal Opportunity Employer / Program. Contractors are required to comply with EEO (41CFR60) requirements and applicable state discrimination laws. These requirements include, but are not limited to the following: Contractors will not discriminate against any employee or applicant for employment because of race, color, religion, sex or national origin. The Contractor will take affirmative action to ensure that applicants are employed, and that employees are treated during employment without regard to their race, color, religion, sex, or national origin. Such action shall include, but not be limited to the following: Employment, upgrading, demotion, or transfer, recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. The contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices to be provided by the contracting officer setting forth the provisions of this nondiscrimination clause.
- III. Code of Conduct (7CFR3016.36(b)(3)) – All Contractors must abide by OCDC's Code of Conduct. No OCDC employee, officer or agent shall participate in the selection, award or administration of a Contract if a real or apparent conflict of interest may be involved. Such conflict of interest would arise when an OCDC employee, officer or agent or any member of his or her family, his or her partner or an organization which employs or is about to employ, any of the parties indicated herein, has a financial or other interest in the Contractor selected under this Award. OCDC employees, officers, agents shall neither solicit nor accept gratuities, favors or anything of monetary value from the Contractor.
- IV. Insurance – Fulfillment of OCDC's insurance requirements is **not required as part of your Response**; however, fulfillment prior to contract award is required. Contractors may be required to provide evidence of General Liability, Professional Liability, and Auto Liability insurance and may be required to add OCDC as an additional insured to these coverages, if applicable. Where Contractors have employees, Contractors will need to provide evidence of Worker's Compensation coverage.

RFQQ ATTACHMENT B: OCDC'S ADMINISTRATIVE REQUIREMENTS

- V. Small, Minority, Woman-owned, Labor Surplus Business Area (2CFR200.321) – All Contractors must take affirmative steps to ensure that small, minority, woman-owned, and labor surplus businesses are used when possible in the performance of a Contract.
- VI. Competition (2CFR200.319) – All Contractors will ensure all transactions are conducted in a manner to provide to the maximum extent practical, open and free competition.
- VII. Disbarment and/or Suspension – OCDC is unable to contract with any firm that has been suspended or disbarred or prohibited from doing business with any federal agency.
- VIII. Additional Requirements – Contractors may also be subject to the following federal requirements:
- Energy Policy and Conversation Act (42USC6201)
 - Contract Work Hours and Safety Standards Act (40USC3701 thru 3708) – if Contract is \geq \$100,000
 - Byrd "Anti-lobbying Act (31USC1352) – if Contract is \geq \$100,000
 - Federal Water Pollution Control Act as amended (33USC1251 thru 1387) – if Contract is \geq \$100,000
 - Clean Air Act (42USC7401) – if Contract is \geq \$150,000