

CITY OF SCAPPOOSE
REQUEST FOR PROPOSALS (RFP)
for
Community Branding Project
RFP #2023-10



SCAPPOOSE
Oregon

Issue date: October 6, 2023
Proposal due date: November 13, 2023

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SECTION 1 – GENERAL INFORMATION

1.1 Background

The City of Scappoose has approximately 8,046 residents and is located 23 miles northwest of Portland in Columbia County, Oregon. Incorporated in 1921, Scappoose has a rich history and a strong sense of community pride but is not aligned on a common brand identity. The Scappoose City Council identified and adopted Goal #1, Objective #1: Identify a process for community branding, prepare a scope of work and request for proposals (RFP). The community branding project seeks to identify a brand theme that resembles the past, present, and future of Scappoose and develop implementation strategies for the identified brand theme.

1.2 Invitation

The City of Scappoose, Oregon is requesting proposals from experienced, professional consultants for a comprehensive community branding exercise.

This RFP contains the necessary information to understand the desired qualifications, the consultant selection process, and the required documentation in submitting a proposal. Procurement documents may be obtained from the City's website at: <http://www.scappoose.gov/rfps>.

1.3 Schedule

Action	Location	Date ¹	Time
Solicitation advertisement	Business Tribune, Spotlight, City Website, League of Oregon Cities, social media, other	10/6/2023	Various
Optional pre-proposal meeting ²	Microsoft Teams	10/18/2023	1:00 pm
Pre-proposal questions due	Email	10/23/2023	5:00 pm
Responses to pre-proposal questions	Email, City Website	10/30/2023	5:00 pm
Proposals due	Email	11/13/2023	5:00 pm
Interviews	Microsoft Teams	11/20/2023 & 11/21/2023	TBD
Notice of intent to award contract	Email	11/22/2023	-
Contract negotiations conclude	-	12/1/2023	-
Challenge period expires	-	12/5/2023	5:00 pm
City Council approval of contract	Scappoose Council Chambers	12/11/2023	7:00 pm
Begin contract	-	12/12/2023	-
Desired project completion	-	6/30/2023 ³	-

¹ These dates are approximate and subject to change at the sole discretion of the City.

² Please register with RFP contact by Tuesday, October 17, 2023 at 5:00 pm.

³ The City is open to alternative project completion dates if another project timeline is more appropriate.

1.4 RFP Contact

All correspondence regarding this RFP should be directed to:

N.J. Johnson, Associate Planner, at njohnson@scappoose.gov or (503) 543 - 7184, ext. 403.

1.5 Proposal Withdrawal

Any proposal may be withdrawn at any time before the “Proposal Due” date and the time specified in **Section 1.3**, by providing a written request for the withdrawal of the proposal to the City. A duly authorized representative of the firm shall execute the request. Withdrawal of a proposal will not prejudice the right of the proposer to file a new proposal on this or future solicitations. Proposals may not be withdrawn within the thirty (30) days following the proposal due date.

1.6 Rejection or Acceptance of Proposals

The City may reject or accept any or all proposal or parts thereof, submitted in response to this RFP.

The City expressly reserves the following rights to:

- a. Disregard any or all irregularities in the proposals;
- b. Reject any or all proposals or portions thereof upon finding it is in the public interest to do so;
- c. Base award with due regard to the quality of services, experience, compliance with the RFP, and other factors as may be necessary under such circumstances; and
- d. Reject all proposals and re-advertise at the City’s sole discretion.

1.7 Evaluation and Selection of Consultant

An evaluation committee of at least three members will be appointed to evaluate the proposals received. For scoring proposals, each member will evaluate each proposal in accordance with the **Content and Evaluation Criteria** detailed in Section 4. The evaluation committee may seek outside expertise, including but not limited to, input from technical advisors, to assist in the evaluation process.

The successful Consultant(s) shall be selected by the following process:

- a. An evaluation committee will be appointed to evaluate submitted written proposals.
- b. The committee will score proposals according to the evaluation criteria.
- c. A short list of proposers, based on the highest scores, will be selected for interviews.
- d. Final scores, based on the same evaluation criteria and interview performance, will be determined.

Review

Following issuance of the Notice of Intent to Award, Consultants that were not selected for contract award may seek additional clarification, debriefing, or to request time to review the selection procedures.

Protest of Contract Awards

Protests may be submitted to the City Manager only from those Consultants who would receive the contract if their protest was successful.

Protests must be in writing and received by the City Manager within seven (7) calendar days, **UNLESS OTHERWISE NOTED**, following the issue date of the City’s Notice of Intent to Award. The protest must

specifically state the reason for the protest and show how its proposal or the winning proposal was misscored or show how the selection process deviated from that described in the solicitation document. No contract will be awarded until the protest has been resolved.

Protests must be timely and must include all legal and factual information regarding the protest and a statement of the form of relief requested. Protests received later than specified or from other than the Consultant who would receive the contract if the protest was successful will not be considered. The exercise of judgment used by the evaluators in scoring the written proposals and interviews, including the use of outside expertise, is not grounds for appeal.

The City Manager may waive any procedural irregularities that had no material effect on the selection of the proposed Consultant, invalidate the proposed award, amend the award selection, request the evaluation committee re-evaluate any proposal or cancel the solicitation and begin again to solicit new proposals. The City Manager shall create a written opinion on the protest and forward that opinion to the City Council for further action. Should the City Council return the matter to the evaluation committee, the City shall issue a notice cancelling the Notice of Intent to Award.

Decisions of the City Council are final and conclude the administrative appeals process.

1.8 Insurance

The Consultant shall be required to provide Errors and Omissions, Professional Liability, Workers' Compensation, General Liability, and Automobile insurance as required for compliance with the City's standards for personal services contracts. All aforementioned policies, other than Workers' Compensation and Professional Liability, shall include the City, its officers, employees, agents, and representatives as additional insureds with respect to the resulting contract with the City. Coverage will be endorsed to provide a "per project" aggregate.

1.9 Execution of Contract

It is anticipated that the total cost for the services contemplated by this solicitation will require authorization by the City Council. The contract should be signed within a week of Council award of the contract.

1.10 Public Records

Any materials submitted by the proposer shall become the property of the City unless otherwise specified. During the evaluation of proposals and the selection of the Consultant, the proposals shall be confidential. After the selection process has been completed, the proposals shall be open to public inspection. Proposals should not contain any information which the proposers do not wish to become public. If it is necessary to submit confidential information to comply with the terms and conditions of the RFP, each page containing confidential information should be clearly marked "NOT FOR PUBLIC DISCLOSURE, CONFIDENTIAL TRADE SECRETS." The City accepts no liability for the inadvertent or unavoidable release of any confidential information submitted, and any claims arising out of any public record request for such information shall be at the proposer's expense.

1.11 Federal/State/Local Requirements

The selected Consultant shall comply with all Federal, State, and local laws as well as all regulations, executive orders, and ordinances applicable to the work under this contract. In addition, the proposers agree to comply with:

- a. Title VI of the Civil Rights Act of 1964;
- b. Section V of the Rehabilitation Act of 1973;
- c. The Americans with Disabilities Act of 1990 and ORS 659.425;
- d. All regulations and administrative rules established pursuant to the foregoing laws and;
- e. All other applicable requirements of Federal and State civil rights and rehabilitation statutes, rules, and regulations.

The Consultant will be subject to the Oregon Workers' Compensation Law and shall comply with ORS 656.017, which requires the provision of Workers' Compensation coverage for all employees working under the resulting contract. The City's programs, services, employment, and volunteer positions are open to all persons without regard to race, religion, color, national origin, sexual orientation, sex, age, marital status, disability, or political affiliation.

Every public contract that is subject to ORS 279C must include a representation and warranty from the consultant that consultant has complied with the tax laws of this state or a political subdivision of this state, including but not limited to ORS 305.620 and ORS Chapters 316, 317, and 318. The public contract must also require a covenant from the consultant to continue to comply with the tax laws of this state or a political subdivision of this state during the term of the public contract and provide that a consultant's failure to comply with the tax laws of this state or a political subdivisions thereof before the consultant executed the public contract or during the term of the public contract is a default for which a contracting agency may terminate the public contract and seek damages and other relief available under the terms of the public contract or under applicable law.

By signing the Statement of Qualifications Form (SOQ) required by this RFP, Consultant certifies compliance with the tax laws of the State of Oregon and its political subdivisions and provides a covenant to continue to comply with the tax laws of the State of Oregon and its political subdivisions for the duration of the contract resulting from this RFP.

1.12 Payment

The City will pay the Consultant(s) under contract for services performed based on the approved rates, the scope of work completed, and anticipated reimbursement expenses. The City will make monthly progress payments within thirty (30) calendar days following receipt of properly itemized invoices.

Payment for extra work not described in the scope of services will only be made when authorized in advance and in writing by the City's Project Manager prior to such work being performed by the Consultant.

If the Consultant anticipates that the fee is going to surpass the not-to-exceed figure because a task has changed and is outside the agreed upon scope, the Consultant shall notify the City in writing of the circumstances with an estimated amount that the fee is to be exceeded. The Consultant shall obtain written permission from the City before exceeding the not-to-exceed fee amount. If the consultant does work that exceeds the maximum fee amount prior to obtaining the written permission, the Consultant waives any right to collect that exceeding amount.

1.13 Incurred Costs

The City is not liable for any costs incurred by proposers in the preparation and/or presentation of their proposals or interviews (if held).

SECTION 2 – SCOPE OF WORK

2.1 Scope of Work

The Consultant will be expected to provide a wide range of responsible and responsive professional services including, but not limited to project management, community research, public engagement, brand selection, and brand implementation strategy.

Generally, only the major tasks along with general expectations and requirements are outlined below. The scope of work outlined in this section represents the minimum work the Consultant must complete. Proposers should outline their detailed plan to address each element of the scope of work in the Project Understanding & Approach section.

TASK 1 - PROJECT MANAGEMENT

The Consultant shall act as the project manager of the Consultant's team, including any sub-consultants or contractors for the duration of the Project. Consultant shall monitor and manage the project to produce promised deliverables on time, in scope, and within budget. Consultant will report on project progress and communicate in a timely manner. The Consultant shall ensure full coordination with City staff and be responsive to emails, telephone inquiries, and discussions in addition to meetings as required under various tasks in the scope of work. Open communication between the Consultant team and City staff will be crucial to a successful project. To fulfill this task, the Consultant will be expected to provide the following:

Task 1.1 Kickoff Meeting - Organize a kickoff meeting with City staff to share available information and knowledge, and discuss and/or confirm the City's expectations, the project approach, project management and communication protocols, and the project schedule.

Task 1.2 Project Administration - Perform general project administration services, monthly invoicing, monthly updates for the project team (City and Consultant), maintaining the project schedule, and project coordination.

Task 1.3 Ongoing Coordination Meetings - At a frequency recommended by the Consultant, the Consultant will host recurring project coordination meetings with City staff. The purpose of these meetings will be to maintain and update the project schedule, develop future deliverables, and discuss project activities.

TASK 2 - COMMUNITY RESEARCH

The City of Scappoose was incorporated in 1921 and already has a great degree of community, local pride, and culture established. Reviewing the work of the past and assessing the city's existing assets will aid the Consultant's understanding of where Scappoose is in its branding journey.

Task 2.1 Review Existing Documents - The City has developed several branding or branding adjacent documents over the years, including the City Vision Statement (2016) and the 50-Year Plan Vision Statement (2023). These will need to be reviewed by the Consultant in order to begin to understand the community's values and the work that has already been completed to date.

Task 2.2 View Previous Meetings - The City of Scappoose posts its public meetings online on the [City's YouTube channel](#). The Consultant will need to view a series of City Council and Economic Development Committee meetings/videos in which community branding is a named agenda item. City staff will identify the specific videos and timestamps that are critical to watch at the time the Consultant is selected.

Task 2.3 Branding Coordination with CET - The Columbia Economic Team (CET) is the local economic development agency in Columbia County. In May 2023, the CET began a county-wide branding exercise with a focus on expanding and promoting tourism in the county. The Consultant for the Scappoose branding project will meet with CET staff and their branding consultant team to coordinate the two branding projects and consider aligning the brand theme of Scappoose with the brand theme CET has selected.

Task 2.4 Asset Inventory - Create an inventory of the community's assets and attractions within Scappoose city limits and urban growth boundary as well as the surrounding areas in each direction. Nearby attractions include Chapman Landing, Crown Z Trail, Rocky Point Trail, Scappoose Bay, Scappoose Creek Inn, Means Nursery, Wildwood Golf Course, and more. The asset inventory should include local attractions, unique enterprises that set Scappoose apart, locations that could or already contribute to the community brand, and opportunities for brand development.

TASK 3 - PUBLIC ENGAGEMENT

Task 3.1 Stakeholder Engagement - The stakeholder advisory committee for the project will be the Scappoose Economic Development Committee (EDC), which is a standing committee of the City. The Consultant will meet and engage with the EDC throughout the process as the community brand & implementation plan are being developed. Although branding does not have to be discussed at every EDC meeting, their meetings take place every third Thursday at 12:00 pm PST. Meeting materials are sent to the Committee and published 7 days prior to the meeting. The Consultant must provide City staff with sufficient time to review and comment on materials before being distributed to the EDC.

Task 3.2 Decision Maker Consultation - In addition to regular meetings with the EDC, the Consultant will attend multiple City Council work sessions. The Consultant will present the progress of the Community Branding Project at key points and seek ongoing feedback from the City Council.

Task 3.3 Community Involvement - Propose a detailed plan to involve and seek feedback from the Scappoose community at large in the brand discovery process. This can include open houses, participation at existing community events, pop-up events, community conversations, and other public engagement activities. Consideration will need to be given to providing outreach materials in Spanish and other languages. Proposers will need to demonstrate their approach and ability to

be receptive to, consider, and consolidate all viewpoints received during the public engagement phase of the project.

Task 3.4 Annual Town Meeting - Attend and participate in the 2024 Annual Town Meeting. The Consultant will provide a presentation to attendees in addition to developing and facilitating an engagement activity to gather public input. The Annual Town Meeting will occur on a Saturday in spring (exact month and date TBD). The selected month will depend on the needs of the City, project, and public engagement plan.

TASK 4 - BRAND SELECTION

Task 4.1 Identify Feasible Brand Themes - Based on research and community feedback, develop a list (approximately 3-5) of feasible community brand themes⁴ that align with Scappoose's values, culture, assets, and opportunities. The potential brand themes will need to authentically reflect the Scappoose community today, have economic benefits, carry an achievable implementation strategy, be a source of community pride, and promote quality of life.

Task 4.2 Options Analysis with EDC - Conduct an options analysis of the feasible brand themes with the Economic Development Committee in which the advantages and challenges of every identified brand option are independently but comparatively explored. This can be done as a SWOT (Strengths, Weaknesses, Opportunities, and Threats) analysis, by evaluating each brand theme against the criteria listed in Task 4.1, or by other means that will achieve the City's goal of narrowing down a brand theme.

Task 4.3 City Council Presentation - When a preliminary brand theme has been identified by EDC, the Consultant will develop and provide a presentation for City Council to ensure that the preliminary brand theme is consistent with Council's vision of Scappoose. While the focus of this presentation will be on the brand theme that emerged, the presentation should also include a brief analysis of other high-quality brand themes for Council's consideration.

TASK 5 - BRAND IMPLEMENTATION

Task 5.1 Develop Brand Implementation Strategies - Develop a draft list of specific and comprehensive strategies to implement the brand identified by EDC and approved by Council. This may include an analysis or specific proposals for a slogan, event themes, architectural design standards, features of public spaces, styles of public art, etc. This will need to include the creation of a new City logo and an easy-to-use template for the City's monthly newsletter. Both the logo and newsletter template should be attractive and consistent with the new identified brand.

Task 5.2 Staff Review Implementation Strategies - Share brand implementation strategies with City staff for a review of their feasibility.

⁴ Defined as a central identity that defines a community's brand such as high tech, outdoor recreation, performing & fine arts, or wine country.

Task 5.3 EDC Review Implementation Strategies - Share brand implementation strategies with EDC for a review of their appeal and conformance with the identified brand theme.

Task 5.4 Council Review Implementation Strategies - Share brand implementation strategies with City Council for a review of their appeal and conformance with the identified brand theme.

SECTION 3 – PROPOSAL FORMAT AND SUBMISSION

3.1 Proposal Submittal

Sealed proposals for the **Community Branding Project (#2023-10)** will be received by the City of Scappoose until **November 13, 2023 at 5:00 PM (PST)** at the address below. Proposals will not be accepted after this date and time. Please include **one (1) hard copy** of the proposal and **one (1) electronic copy** emailed to the RFP Contact listed in Section 1.5. The City is not liable for any costs incurred by proposers in the preparation and/or presentation of their proposals or interviews.

Proposals must be submitted in a sealed envelope and clearly marked as follows:

City of Scappoose
Attn: N.J. Johnson, Associate Planner
33568 E. Columbia Ave.
Scappoose, Oregon 97056
RE: Proposal for RFP #2023-10 - Community Branding Project

3.2 Proposal Format

To provide a degree of consistency in review of the written proposals, the standard format for proposals is as follows:

- a) **Page limit:** 19 - Proposals exceeding the specified number of pages in Section 4 may be deemed non-responsive. Each side of the page is counted as one page for hard copy proposals printed double-sided.
- b) **Font size:** 11 or 12-point
- c) **Font style:** Calibri preferred, Arial accepted

3.3 Recycled Products Statement

Proposers shall use recyclable products to the maximum extent economically feasible in the preparation of proposals, and the selected Consultant shall continue the same practice in the performance of the contract work in accordance with ORS 279B.270.

SECTION 4 – CONTENT AND EVALUATION CRITERIA

	Content and Evaluation Criteria	Maximum Pages	Maximum Score
1	Cover letter	2	5
2	Statement of Qualifications (Mandatory)	1	Pass/Fail
3	Project understanding & approach	5	35
4	Proposed schedule	1	10
5	Proposed budget	2	10
6	Past project examples (1-3 required)	6	25
7	Project team organization	2	15
	Subtotal	19	100
8	Interviews	N/A	100
	Total	19	200

4.1 Cover Letter

Provide an overview of the submittal, highlighting key points, understanding of important or critical issues and considerations for the project, and the unique experience that qualifies your firm to successfully complete the project. The letter should address the firm's willingness and commitment, if selected, to provide the services and a description of why the proposer believes they should be selected.

4.2 Statement of Qualifications (Mandatory)

- a) The name of the firm, as well as, the signature, printed name and title, telephone and fax number, and email address of the officer authorized to represent the proposer in any correspondence, negotiations and sign any contracts that may result
- b) The address of the office that will be providing the service, project manager's name, telephone number, fax number, and email address
- c) The Federal and State tax identification numbers, and the state of incorporation
- d) Indicate whether the proposer is a "Resident Bidder" as defined in ORS 279A.120

All fields on the Statement of Qualifications Form (SOQ) included in Appendix A must be filled out by proposer. By signing the Statement of Qualifications, Proposer certifies compliance with the tax laws of the State of Oregon or a political subdivision of the State of Oregon and provides a covenant to continue to comply with the tax laws of this state or a political subdivision of this state for duration of this contract. Proposals submitted without a complete and signed SOQ Form will be deemed nonresponsive.

4.3 Project Understanding & Approach

Provide a detailed narrative of the proposer's understanding and approach to the project, describing how consultant will complete all deliverables, and details about how each deliverable will be created, consistent with the City's purpose and approach to this scope of work and project. Provide a detailed description of the issues perceived by the consultant that must be addressed for this project to be successful, and solutions for identified problems. Provide a high-level description of critical schedule elements to be addressed.

4.4 Proposed Schedule

A proposed project timeline that identifies tasks, milestones, and the estimated timeline for completing each task is required. Additionally, proposers are asked to include their availability to begin the work. The City desires the Community Branding Project to be completed by July 2024. However, the City is also open to an alternative project completion date if another project timeline is more appropriate.

4.5 Proposed Budget

Submit a proposed project budget including a breakdown of personnel, materials, and total cost.

4.6 Past Project Examples

In order to receive points under this category, proposers must provide project descriptions of **1-3** past projects of similar size and scope that exemplify proposers' qualifications. Please list the team member(s) that worked on the example projects. Each project description should include the following:

- a) Project name
- b) Agency name
- c) Budgeted and actual project costs
- d) Organizational reference contact
- e) Major deliverables/documents produced such as an adopted branding plan or branding guidelines (attached as appendix, does not count against page limit)

4.7 Project Team Organization

Provide an overview of the proposer's project team highlighting their experience, qualifications, and technical capacities that are relevant to the project.

Briefly describe the team's key personnel and their experience, qualifications, and roles on this project.

- a) Describe your team's communication methods; provide an example of how this method provides benefit to the project team, and ultimately the City.
- b) Indicate the number of other projects that will be managed by the Project Manager during the time they would be assigned to the City's project.
- c) Provide a simple chart of the proposed project team structure.

Provide resumes for the project team's key members. Each resume should not exceed two (2) pages and must show the years of experience, licenses, certifications, and relevant project experience (attached as appendix, does not count against page limit).

4.8 Interview

Proposers do not need to provide a written response to this criterion.

- a. A minimum of three (3) evaluators shall score the interviews/follow-up questions.
- b. The interviews/follow-up questions will have a maximum score of 100 points.
- c. The number of Proposers selected for interviews/follow-up questions will be, to the greatest extent practicable, at least the two highest ranked proposers based on proposal scores.

- d. If the City elects to use follow-up questions as an alternative to interviews, questions will typically be sent via email to Proposer(s). Proposers' responses to the follow-up questions must be received by the City via email by the deadline provided.
- e. Interviews normally require physical attendance at City offices; however, the City may elect to conduct interviews virtually via Microsoft Teams. Further details will be included with notification of the time and date of interviews to proposers selected for interview.

APPENDIX A

A.1 Statement of Qualifications (SOQ) Form

A.2 Sample Contract

A.3 Major deliverables/documents produced from past project examples

A.4 Resumes of Project Team's Key Members