

Request for Proposal (RFP)

Business Solutions RFP for Software Services

Oregon School Boards Association (OSBA)

Proposals Due: **Not later than May 7, 2019, at 12:00 p.m. PST, in the offices of the Oregon School Boards Association, 1201 Court Street NE, Suite 400, Salem, OR 97301**

Issuing Office: OSBA 1201 Court Street NE, Suite 400 Salem, OR 97301	Contact Name: Chris Davidson Title: Director, Business Services Phone: 503-588-2800 Email: cdavidson@osba.org
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WHO WE ARE

OSBA is a member services association of locally elected school boards. Our boards are composed of 1,400 volunteers, locally elected public officials who serve on school district, education service district and community college boards. Collectively, they oversee the education of approximately 970,000 students. OSBA is governed by a board of 22 directors and up to six non-voting ex-officio members. OSBA provides a variety of services to its members, including communications, litigation, labor, policy, board development, property and casualty insurance pool, and legislative services.

SCOPE OF WORK

OSBA has a need to purchase and is conducting this Request for Proposals (“RFP”) to find a contractor to provide software services (described below). OSBA intends to select a contractor qualified to provide such software services as needed from May 2019 through December 2021.

OSBA desires the following services:

1. Development of database to house membership information for 300 member entities, and other organizations, which must include, at a minimum:
 - a. Ability to enter at least 15 persons per member entity;
 - b. Ability for members to sign in and register for events;
 - c. Ability for OSBA to send communications using subscriptions and settings;
 - d. Web access; and
 - e. Be complete by September 1, 2019.
2. Ongoing support for the database.

The contractor’s work must meet the highest standards prevalent in the industry or business most closely involved in providing goods or services that OSBA is purchasing.

REQUIREMENTS

The successful firm must have the qualifications, experience, and expertise to provide OSBA with technology relating to, but not necessarily limited to: business solutions to managing comprehensive membership data management; accounting integration; event management; self-serve, online member access; on-demand access to information via mobile app; and specific customizations based on OSBA needs. Examples of OSBA needs include integration with current software (CRM, SAGE, Lyris), electronic invoices, online payment system, and ongoing training and support.

Contractor's proposal must include explanation of how the contractor will fulfill the scope of work and evidence that contractor meets all requirements included in this solicitation document.

The selected contractor must have a minimum of **two** years' experience providing technology/software services for business/operations management. The selected contractor must have significant experience in working with school board associations.

If the selected contractor fails to perform the scope of work identified in this solicitation document or fails to meet the established performance standards, OSBA may reduce or withhold payment, require the contractor to complete the work, announce default and termination of the contract, or other remedies as outlined in the contract.

TERM OF APPOINTMENT

The contractor will be appointed through December 2021, with an option to renew the contract for two (2) additional two-year extensions. The appointment shall be with the rate of compensation and fees to be reviewed and agreed upon in the contract. This contract shall not in any way limit OSBA from seeking other technology/software services from any contractor.

QUALIFICATION STATEMENT REQUIREMENTS

Contractors interested in assisting OSBA with the provision of services described under the Scope of Work section above, must prepare and submit a Qualification Statement to include the information required below. OSBA will consider only contractors that submit a Qualification Statement which includes all the information required to be included as described herein (in the sole judgment of OSBA).

Professional Information and Qualifications

Each interested contractor shall submit the following information:

1. Name of contractor;
2. Address of principal place of business and office locations, telephone and fax numbers;
3. A description of the business organization (i.e., corporation, partnership, joint venture,

- etc.) of contractor, its ownership and its organizational structure;
4. Any other information which the interested contractor deems relevant; and
 5. Disclose any potential conflicts of interest, including listing all immediate relatives who are OSBA employees.

SELECTION CRITERIA

The selection criteria used in awarding a contract for software services as described herein shall include:

1. Thoroughness and understanding of work to be completed;
2. Experience, references, and reputation with existing and former clients;
3. Responsiveness, availability, and ability to perform the work in a timely fashion; including adequate staffing and familiarity with the subject matter; and
4. Cost effectiveness/rate schedule.

Selection criteria (including rate schedule) shall be but one factor along with qualifications and compliance with the scope of work for consideration by OSBA when awarding a contract. No one factor including the rate schedule proposed by the contractor shall be a dispositive factor.

OSBA may cancel the procurement or reject any or all proposals at any time in accordance with state law (ORS 279B.100).

After OSBA issues its intent to award, protests can be filed in accordance with state law.

INTERVIEWS

A review committee consisting of OSBA staff will review and rate the proposals and identify proposers to be interviewed. Interviews may be held at a time, date and place in Salem, Oregon, to be designated. Based on the number and quality of the proposals submitted, OSBA reserves the right, at its sole discretion, to make an award without interviews.

RFP PROPOSAL PROCEDURES

This RFP does not commit OSBA to paying any costs incurred by any proposer in the submission or presentation of a proposal, or in making the necessary studies for the preparation thereof. Sealed proposals will be accepted until **12:00 p.m.** PST, May 7, 2019, at the Oregon School Boards Association Office, 1201 Court Street NE, Suite 400, Salem, Oregon 97301. Proposals submitted in person should be submitted to Chris Davidson, OSBA Director of Business Services, or to the front desk. Solicitation document may be reviewed at this office.

Proposals may also be submitted via email by the date and time listed above to Chris Davidson at cdavidson@osba.org; subject line should identify that this is in response to "Business Solutions RFP".

Proposals submitted in person or by mail are to be clearly labeled on the outside of the envelope "Business Solutions RFP".

Proposals will be opened at 2:00 p.m. on May 7, 2018 at OSBA, 1201 Court St. NE, Ste. 400, Salem, OR 97301.

OSBA CONTACT INFORMATION

OSBA's point of contact is Chris Davidson at cdavidson@osba.org. He will be responsible for contract oversight. No contractor may contact any OSBA Board or staff member regarding this RFP, other than the contact person, during the proposal period. Any proposer requiring further clarification of the proposal procedures contained herein should submit specific questions in writing via email to Chris Davidson at cdavidson@osba.org. A written response will be provided to those questions that are deemed appropriate. The response will be in the form of an addendum and will be sent to all proposers in receipt of this RFP.

The Proposer fully understands and submits its proposal with the specific knowledge that:

1. The selected proposal must be approved by the Executive Director of OSBA;
2. In the event that the Proposer's proposal is accepted and receives all necessary approvals, the proposal will be incorporated into a contract containing general terms and conditions as provided in this Request for Proposal, and the resultant contract must be approved by OSBA's Executive Director.

The undersigned hereby certifies to the truth and accuracy of all statements, answers, and data contained in this proposal and application, and hereby authorizes OSBA to make any necessary examinations or inquiries in order to make a determination as to the qualifications and responsibility of the Proposer. The undersigned certifies that it and any subcontractor will not discriminate in accordance with 279.110(4), and that it will comply with Oregon tax law and ORS 305.385, if applicable. The undersigned has examined all parts of this RFP and understands that it is completely discretionary with the Selection Committee whether to accept, reject, or negotiate its proposal submitted pursuant thereto.

Printed Name of Proposer: _____

Signature of Proposer: _____

Title: _____ **Date:** _____