[](https://dash.das.state.or.us/Site_images/Buttons/state_seal_color.jpg) **BUYERS GUIDE** *FOR*

**Business & Strategic Planning Services**

***Version [1.0] dated [05/2023]***

*(Before ordering, check OregonBuys for the latest version)*

**DESCRIPTION:**

January 11, 2023, Governor Kotek delivered a set of expectations to the leaders of Oregon state agencies that are focused on public administration (“Oregon Agency Expectations”). Among them is the expectation that all state agencies develop and follow a strategic plan using goals outlined by the Governor’s office. Agencies should use this strategic planning process to also satisfy the state requirements around Diversity, Equity & Inclusion (“DEI”) plans and Information Technology Strategic Plan.

Department of Administrative Services, Procurement Services (DAS PS) has established thirteen (13) Master Price Agreements for Business & Strategic Planning Services (“Services”).

**AWARDED PRICE AGREEMENT NUMBERS:**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Contractor | PA# | Contact | Email | Pnone # |
| BerryDunn | DASPS-3111-19 | Kevin Scheirer | [pqcv@berrydunn.com](mailto:pqcv@berrydunn.com) | 480-482-3011 |
| Coraggio Group | PO-10700-0004971 | Michelle Janke | [michelle@coraggiogroup.com](mailto:michelle@coraggiogroup.com) | 503-493-1452 |
| CSG | DASPS-3113-19 | Colleen May | [rfp@csgdelivers.com](mailto:rfp@csgdelivers.com) | 312-444-2760 |
| Deloitte | DASPS-3114-19 | Kevin Kelly | [kevkelly@deloitte.com](mailto:kevkelly@deloitte.com) | 503-727-3098 |
| Elyon Enterprise Strategies | DASPS-3106-19 | Karen Morphy | [karenmorphy@elyonstrategies.com](mailto:karenmorphy@elyonstrategies.com) | 916-932-2050 |
| KAI Partners | PO-10700-0016004 | Angela Darchuk | [adarchuk@kaipartners.com](mailto:adarchuk@kaipartners.com) | 916-465-8067 |
| North Highland | DASPS-3119-19 | Jon Burchard | Jon.burchard@northhighland.com | 916-208-4530 |
| Olympic Performance | DASPS-3120-19 | Ron Sarazin | [ron@123workflow.com](mailto:ron@123workflow.com) | 503-682-0900 |
| Pivotal Resources | DASPS-3123-19 | Cheralynn Abbott | [cabbott@pivotalresources.com](mailto:cabbott@pivotalresources.com),  sdorn@pivotalresources.com | 925-975-0500 x226 |
| Alvarez & Marsal Public Sector Services LLC | DASPS-3561-20 | Tom Shaffer | [tshaffer@alvarezandmarsal.com](mailto:tshaffer@alvarezandmarsal.com), jrust@alvarezandmarsal.com | 202-680-2299 |
| Gartner, Inc | DASPS-3563-20 | Heide Cassidy | [Heide.cassidy@gartner.com](mailto:Heide.cassidy@gartner.com); [eric.cameron@gartner.com](mailto:eric.cameron@gartner.com) | 206-454-8913 |
| Mathtech, Inc. | DASPS-3564-20 | John Senk | [jsenk@mathtechinc.com](mailto:jsenk@mathtechinc.com); [jwoodcock@mathtechinc.com](mailto:jwoodcock@mathtechinc.com) | 781-929-8301 |
| PEAK Fleet, LLC | DASPS-3565-20 | Jennifer Coyne | [Jen.coyne@thepeakfleet.com](mailto:Jen.coyne@thepeakfleet.com); [brian.stinson@thepeakfleet.com](mailto:brian.stinson@thepeakfleet.com) | 503-544-0135 |

PS CONTRACT ADMINISTRATOR CONTACT INFORMATION:

Jennifer Jolley

971-900-7695

Jennifer.jolley@oregon.gov

**BEST VALUE ANALYSIS INSTRUCTIONS:**

Authorized Purchaser’s (AP) will select Cotnractors based on the following process:

1. If required work will be $10,000 or under, AP may direct award (under OAR 125-247-0265) to a Contractor qualified to provide Organizational Improvement Services in the Agency’s required service category without a Best Value Analysis (BVA);
2. AP’s must complete the BVA for all work over $10,001;
3. If required work will exceed or has the potential to exceed $150,000;
   1. **DAS Delegation**. Authorized Purchasers that are agencies of the State of Oregon under DAS procurement authority may issue ordering instruments under this MSA for any dollar amount without further delegation of procurement authority from DAS. Notwithstanding the foregoing DAS delegation, Authorized Purchasers that are agencies of the State of Oregon must obtain all other necessary approvals, including but not limited to legal sufficiency approval, as may be required.
   2. DOJ legal sufficiency review and approval will be required for all State Agencies.
4. If the required work will exceed or has the potential to exceed, $60K annually or will displace bargaining unit members, AP will conduct a [formal feasibility](https://www.oregon.gov/das/HR/CBA/SEIU%20Feasibility%20Form%2015-19.pdf) study in accordance with Article 13—CONTRACTING OUT of the SEIU Collective Bargaining Agreement and place a copy in the procurement file. (If your Agency is not under the SEIU Collective Bargaining Agreement, this requirement will not apply).

If the required work will exceed $250K or has the potenetial to exceed $250K, conduct a feasibility determination, cost analysis and evalutaiton in accorandce with OAR 125-247-0110 and place a copy in the procurement file. A copy of the form can be found on DAS PS’ website, <http://www.oregon.gov/das/Procurement/Pages/Forms.aspx>, under information technology (IT).

1. AP shall issue a Opportunity Notice, Exhibit D, electronically, via email, or other electronic methods, to all Contractors awarded a Price Agreement for Strategic Planning Services (see above). Agency shall allow a minimum of five (5) business days for Contractor’s response. Longer response times may be required for more complex projects;
2. AP shall establish an evaluation team to evaluate and score the Proposals received, as indicated in the Proposal Request. Evalutaion criteria may be Contractor’s qualifications, cost, experience or any other requirements pertinent to Agency’s project. Agency’s evaluation committee shall evaluate each fo the proposals received timely in response to the Opportunity Notice issued;
3. AP may either select a Contractor at the conclusion of the proposal evaluation or establish a competitive range and conduct interviews with those Contractors in the competitive range;
4. AP will either select a Contractor at the conclusion of the proposal evalutions or conduct interviews and select a Contractor at the conclusion of the interview;
5. AP’s shall use Exhibit B Service Order Contract (SOC) to establish a contract with the awarded Contractor. AP’s shall also post to ORPIN the executed SOC;
6. AP shall issue a notice of intent to award;
7. AP shall provide for a seven (7) day protest period of the notice of intent to award and shall timely respond to any protests.

AP’s are encouraged to include specific service delivery details in the SOC being certain to detail any negotiated\* rates, services, accessibility or combination or promised services.

\* rates agreed to between AP and Contractor cannot be highter than those in Exhibit H, Rate Schedule.

**PRICING, SPECIAL ORDERING INSTRUCTIONS:**

See Exhibit H Rate Shechedule for each Contractor’s hourly rates.

Exhibit 1

Service Category Descriptions

Service Category A: Business & Strategic Planning

* Training: Classroom, webinar, online; Possible trainings include the following:
  + Basics of business & strategic planning;
  + Development of a business or strategic plan;
  + Successful implementation of the business or strategic plan; or
  + Customized training
* Certification (Optional, not all contractors offer this. See each contract for certification availability)
* Professional Services: Possible professional services include the following:
  + Development of a strategic plan that is adaptable to changes in state government, the agency, or other reason that might require the plan to change;
* Engagement and facilitation of meetings with leadership relating to strategic planning;
* Mission statement, vision, goals, strategies and measurable objectives;
* Organizational performance measures aligned with mission, vision, goals and objectives;
* A work plan and schedule outlining the priorities for objectives, timelines and accountabilities for each goal;
* Business structure, core functions, services provided and internal/external customers and stakeholders;
* Financial and human resources needed to support core business functions and services;
* Facilitation of strategic planning methods, such as SWOT, SOAR or PESTLE, or something similar; or
  + Establish ownership and develop a process to ensure accountability for completion of the objectives and strategic goals.
* Change Management: To ensure the success of Agency’s business or strategic plan.