

State of Oregon



Forestry Workforce Study

Intermediate Request for Proposal: OregonBuys #S-52500-00011075

HECC #24-018

Date of Issue: 7/24/2024 Closing Date 8/21/2024 at 3:00 PM Pacific Time

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1. INTRODUCTION

The State of Oregon, acting by and through the Higher Education Coordinating Commission (“HECC”), is issuing this Request for Quotes (“RFP”) for a Contractor to assess Oregon’s forestry workforce as further described in this RFP.

HECC anticipates the award of one Contract from this RFP. The initial term of the Contract is anticipated to expire June 30, 2025. HECC reserves the right to amend the resulting Contract for related services and time as HECC determines necessary.

HECC is conducting this intermediate procurement under the authority of OAR 125-246-0170(2)(c)(C).

The estimated budget for this work is under \$250,000; this project is funded with state general funds.

2. BACKGROUND

In 2024, the Oregon Legislature passed [Senate Bill 1552 \(Regular Session\)](#) (hereafter, “SB 1552”). Sections 40 through 42 of SB 1552 requires HECC to conduct a forestry workforce study to assist its commission in understanding and addressing challenges in Oregon’s forestry workforce. HECC has chosen to form a subcommittee of the Workforce and Talent Development Board (“The WTDB”) to oversee the selection, monitoring, and completion of the study. The name of the subcommittee is the “Forestry Workforce Steering Committee (“FWSC”).

The WTDB advises Oregon’s workforce development system and aims to align education, training, and employment opportunities with the needs of employers and communities. By leveraging partnerships with employers, educational institutions, government agencies, and community organizations, Oregon’s workforce development system strives to create a dynamic and resilient workforce capable of driving sustainable economic growth and prosperity for all residents.

Oregon’s diverse economy, with multiple industries and sectors which includes the forestry sector offers a wealth of opportunities for Oregonians to thrive. However, challenges such as demographic shifts, longstanding and persistent racial disparities, technological advancements, rural isolation, and economic fluctuations underscore the need for collaboration and innovation in how Oregon organizes, manages, and accounts for the forestry workforce.

For the purposes of this RFP, “Forestry Sector” means, “private businesses, nonprofit organizations, educational and workforce providers and public entities that are engaged in logging, forestation, wildland fire prevention and suppression, construction and maintenance of roads required for forestry, aggregate production of forestry products, trucking related to forestry, tree services, technical and professional services required for forestry, forest surveying, fuel mitigation efforts related to forestry, forestry habitat restoration, watershed improvement, crop tree release and stand improvement, forest tract management, tree nurseries, mechanical services for forestry, provision of forestry products, training resources for the forestry workforce, educational resources for the forestry workforce, human resources for the forestry workforce and other in-forest or forest-affiliated services.” (SB 1552, Section

40(a.) FWSC's requires that the Project, as described below, includes forest or wood products manufacturing as part of the Forestry Sector study.

"Forestry Workforce" means, "the owners, proprietors, partners and employees of companies and organizations composing the forestry sector."

3. THE PROJECT SCOPE

The Successful Proposer will:

- a) Assess the current forestry workforce, the workforce's demographics and needs and the community benefits of forestry. The assessment required under this subsection shall take into consideration state plans and initiatives related to forest health, climate, and economic development that may influence the demands on the forestry workforce.
- b) Collaborate with Oregon business associations that represent private forest employers and forest management enterprises to assess the future forestry workforce capacity requirements, as well as the potential impacts, benefits, and opportunities for the forestry workforce.
- c) Consult with state and federal economic development, labor, employment and licensing agencies to account for current tracking and monitoring techniques for the forestry workforce and to ensure that the study is not duplicative of other studies. Build upon whatever has already been compiled, including but not limited to: WTDB Talent Assessment, Oregon Forestry Resources Institute 5-year study, and university studies.
- d) Consult with state and federal natural resource agencies to align priorities and understand future forestry workforce needs.
- e) Consult with publicly available training and education providers to fully understand career pathways and training opportunities for the forestry workforce.

Comprehensive Assessment and Report Scope

To conduct the forestry workforce study, the WTDB needs one contractor to perform the services of an economic/workforce/research/labor force consultant as described in this RFP. The activities from SB 1552, Section 40, include, but are not limited to:

- a) Facilitating an initial survey discussion, other ongoing conversations, and meetings with the steering committee and others to better understand and capture information, key issues, opportunities, solutions, recommendations, priorities, and other topics as deemed necessary by the committee regarding the Forestry Sector and its diverse subsectors.
- b) Identifying existing secondary and post-secondary education, training, apprenticeship and workforce development programs that prepare Oregonians for careers in the forestry workforce;
- c) Collecting data on participation in, completion of and employment outcomes for programs identified in paragraph (a) of this subsection;
- d) Identifying the number, type and location of businesses, nonprofit organizations, education

and workforce providers and public entities composing the forestry sector in this state;

- e) Collecting data on the number, occupations, industries, wages and demographics of the forestry workforce in this state;
- f) Assessing current and projected forestry workforce needs;
- g) Identifying deterrents and opportunities for the forestry sector in retaining and recruiting the forestry workforce; and
- h) Developing recommendations to enhance the recruitment and retention of the forestry workforce.
- i) Providing a data gathering plan, including a description of what data gathering resources to be uses, how data will be collected, and what data sets will be used for the report ensuring that any data gaps are clearly identified as future collection needs.
- j) Responding to other requests deemed necessary as agreed to by the FWSC.

4. TASKS AND DELIVERABLES

The proposed Tasks and Deliverables below are examples of what HECC thinks it may want. Proposer should use their experience and expertise to propose how the work shall progress, including the number, frequency, and content of meetings with the FWSC and staff.

Task #1: Review Documents

The Successful Proposer's first task should be to conduct a review of documents. At a minimum, the informational documents reviewed should include:

- [Senate Bill 1552](#) (Regular Session 2024) Sections 40 through 42
- The purpose and function of the WTDB and current and previous talent assessments: <https://www.oregon.gov/workforceboard/about/Pages/About-Us-Home.aspx>
- The purpose and function of HECC's Office of Workforce Investments: <https://www.oregon.gov/highered/about/workforce/pages/intro-owi.aspx>
- Need to survey the landscape of other reports. Review additional reports on Oregon's forestry workforce, economic development, universities, [Oregon Forest Resources Institute](#), Oregon Department of Forestry, and others as recommended by the FWSC.

Deadline: As soon as possible following contract execution.

Task #2: Kick-Off Meeting

The Successful Proposer will facilitate a Kick-Off Meeting with the FWSC and other key interested parties to be scheduled as soon as possible after the review of documents. A critical goal of the Kick-Off Meeting will be to discuss the review of the above documents. Progress and status of recommendations and actions called out in these documents will be discussed.

Deadline: Within 14 days of completion of Task #1.

Task #3: Develop Project Plan

The Successful Proposer will design a Project Plan that aligns with the project scope described above and set deliverable timelines.

Deliverable: Project Plan submitted for FWSC's approval

Deadline: September 31, 2024

Task #4: Project Plan Revision/Approval Meeting

The Successful Proposer will conduct a meeting with the FWSC and HECC staff for review and approval of the Project Plan. The parties may agree to meet virtually or in-person.

Deadline: October 15, 2024

Task #5: Forestry Workforce Study

The Successful Proposer will implement the Project Plan and conduct the forestry workforce study, including a cost benefit and program impact analysis and provide recommendations.

Deadline: February 31, 2025

Task #6: Report Development and Revisions

The Successful Proposer will analyze the information gathered in Task #5, seek additional information, and begin development of recommendations for a Final Report. The Final Report will provide assessment, analysis, recommendations (including recommendations on priorities), and a suggested timeline to implement the recommendations. It is understood that the development of the Final Report may be an iterative process among members of the FWSC, HECC staff, and the Successful Proposer.

Deliverable: Draft Final Report submitted to the FWSC for review and approval

Deadline: May 31, 2025

Task 7: Final Report

The Successful Proposer will provide the FWSC a Final Report for HECC's distribution to the interim committees of the Legislative Assembly related to natural resources, education, and higher education.

Deliverable: Final Report submitted to the FWSC

Deadline: June 20, 2025

Other Tasks

In order to complete the Project, the Successful Proposer may need to facilitate and participate in six to eight additional meetings with the FWSC.

5. PROPOSAL SUBMISSION

Proposals **must** be submitted through the state’s electronic procurement system, OregonBuys, no later than 3:00 PM Pacific Time on August 21, 2024. The OregonBuys number is shown on the first page of this RFP. HECC cannot accept any proposals outside of the OregonBuys system.

6. PROPOSAL CONTENT REQUIREMENTS

Proposals must address each of the items listed in this section and all other requirements set forth in this RFP. Proposer shall describe the Goods to be provided or the Services to be performed or both. A Proposal that merely offers to provide the Goods or Services as stated in this RFP will be considered non-Responsive to this RFP and will not be considered further.

A. Proposal Certification Sheet

The Proposer shall complete and submit the Proposer Information and Certification Sheet (Attachment A).

B. Introduction to Proposer and Proposer’s Relevant Experience

Describe Proposer. Describe the firm. How long has it been in business? From which locations will the services be performed? How does Proposer support diversity, equity, and inclusion? How does Proposer support responsible environmentally sustainable practices?

The Proposal must contain information that clearly demonstrates that Proposer has a minimum of three years of professional experience within the past five years, successfully providing services that are comparable to those described in this RFP.

HECC prefers Proposers that have experience working with a government entity. If your firm has this experience, include a discussion that describes the experience.

Proposals should contain a discussion on Proposer’s ability to successfully complete the Project on time and within budget.

C. Proposer’s Implementation Plan

The Proposer shall describe how they intend to do the work. The description should include:

- Proposer’s knowledge and understanding of the Project.
- The approach that Proposer will take in performing the work described in this RFP; must include a sample timeline and proposed schedule.
- If possible, how Proposer’s plans will help HECC achieve the goals outlined in HECC’s [Equity Lens](#). Working toward equity requires an understanding of historical contexts and the active investment in changing social structures and practice over time to ensure that individuals from all communities have the opportunities and support to realize their full potential. The HECC applies its Equity Lens to all aspects of its work.
- If possible, how Proposer’s plans will further responsible environmentally sustainable practices and products used in this Project.

D. Key Person Experience and Resumes

The Proposer should describe its relevant experience and include the resumes of all key staff to perform the Services.

E. Cost Proposal

For each activity described in the **Tasks and Deliverables Section**, the cost proposal must include identifiable costs, time estimates for completing each activity, and a summary of all proposed costs pertaining to each deliverable listed in accordance with the itemized activity. HECC prefers Proposals with a fixed fee per task/deliverable, but will consider Proposals to state the hourly rates for Proposer's key staff performing the Services and a total not-to-exceed limitation per each task/deliverable.

7. EVALUATION

Proposals shall be evaluated on the following criteria and scored out of 100 possible points:

Experience (25 points possible)

- How well has the Proposer demonstrated their experience in conducting research and reports of this nature?
- How familiar and experienced is Proposer with this subject matter?
 - Does Proposer have direct experience evaluating the forestry workforce?
 - How well has the Proposer demonstrated experience and/or capability to assess the forestry workforce?

Project Approach (25 points possible)

- How well does the Proposer clearly and concisely describe their intended approach to performing the work described in this solicitation?
- How well does the Project Approach demonstrate an understanding of the Project requirements?
- Does the Proposer offer any new or enhanced ideas to add value to the work described in this solicitation?
- Does Proposer itself, or through their Project Approach further HECC's goals of diversity, equity, inclusion, and accessibility?

Cost Proposal (25 points possible)

- How clearly and concisely does the Proposer convey the cost per deliverable?
- How clearly and concisely does the Proposer convey the basis on which prices are quoted?
- How well do the proposed costs align with the Proposer's Project Approach?

- What is the overall cost?

Resources (20 points possible)

- How well does the Proposer demonstrate they have the resources to successfully provide the Services described in this solicitation in the timeframe required by HECC?

Public Information/Past Performance (5 points possible)

- Publicly available information, if any, may be used to evaluate Proposers.
- Past performance with State of Oregon agencies, if any, may be used to evaluate Proposers.

Proposers will then be ranked in order of median scores calculated from points awarded by a scoring evaluation committee. After an initial evaluation session, HECC may ask leading Proposers for interviews.

8. SUCCESSFUL PROPOSER REQUIREMENTS

A. Insurance

Prior to execution of the Contract, the apparent Successful Proposer shall secure and demonstrate to HECC proof of commercial general liability insurance coverage in the amounts of \$1,000,000 per occurrence and \$2,000,000 aggregate, unless otherwise negotiated. Policies can usually be obtained for short-term durations for relatively low cost—please consult an insurance broker if you do not already carry the above-described insurance.

B. Taxpayer Identification Number

The apparent Successful Proposer shall provide its Taxpayer Identification Number on a completed W-9 form (which can be found here: <https://www.irs.gov/pub/irs-pdf/fw9.pdf>). The apparent Successful Proposer must provide its backup withholding status on the W-9 form if either of the following applies:

1. When requested by HECC (normally in an intent to award notice), or
2. When the backup withholding status or any other information of Proposer has changed since the last submitted W-9 form, if any.

HECC will not make any payment until HECC has a properly completed W-9.

C. Business Registry

If selected for award, Proposer shall be duly authorized by the State of Oregon to transact business in the State of Oregon before executing the Contract. The selected Proposer shall submit a current Oregon Secretary of State Business Registry number, or an explanation if not applicable.

All Corporations and other business entities (domestic and foreign) must have a Registered Agent in Oregon. See requirements and exceptions regarding Registered Agents. For more

information, see Oregon Business Guide, How to Start a Business in Oregon and Laws and Rules. The titles in this subsection are available at the following Internet site:
<http://www.filinginoregon.com/index.htm>.

9. ADDITIONAL INFORMATION

A. Governing Laws

This RFP is governed by the laws of the State of Oregon. Venue for any administrative or judicial action relating to this RFP, evaluation and award is the Circuit Court of Marion County for the State of Oregon; provided, however, if a proceeding must be brought in a federal forum, then it must be brought and conducted solely and exclusively within the United States District Court for the District of Oregon. In no event shall this Section be construed as a waiver by the State of Oregon of any form of defense or immunity, whether sovereign immunity, governmental immunity, immunity based on the Eleventh Amendment to the Constitution of the United States or otherwise, to or from any Claim or from the jurisdiction of any court.

B. Ownership

All Proposals submitted in response to this RFP become the Property of HECC. By submitting a Proposal in response to this RFP, Proposer grants the State a non-exclusive, perpetual, irrevocable, royalty-free, fully paid-up, worldwide license for the rights to copy, distribute, display, prepare derivative works of and transmit the Proposal solely for the purpose of evaluating the Proposal, negotiating an Agreement, if awarded to Proposer, or as otherwise needed to administer the RFP process, and to fulfill obligations under Oregon Public Records Law (ORS 192.311 through 192.478). Proposals, including supporting materials, will not be returned to Proposer unless the Proposal is submitted late.

C. Cost of Submitting Material

Proposer shall pay all the costs in submitting its Proposal, including, but not limited to, the costs to prepare and submit the Proposal, costs of samples and other supporting materials, or costs to participate in demonstrations.

D. Statewide E-waste

If applicable, Proposer shall include information in its Proposal that demonstrates compliance with the Statewide E-Waste/Recovery Procedure 107-011-050_PR. Download the procedure by visiting www.oregon.gov/DAS, then enter the procedure number into the search bar, and find the procedure in the search results window.

E. Recyclable Products

Proposer shall use recyclable products to the maximum extent economically feasible in the performance of the Services or Work set forth in this document and the subsequent Contract. (ORS 279B.025)

F. Printing, Binding Work

Except as provided in ORS 282.210(2), all printing, binding and stationery work, including

the manufacture of motor vehicle registration plates and plates required to be affixed to motor carriers, for the State or any county, city, town, port district, school district, or other political subdivision, must be performed within the State of Oregon.

ATTACHMENT A — PROPOSAL CERTIFICATION SHEET

Legal Name of Proposer: _____

Address: _____ City, State, Zip: _____

State of Incorporation: _____ Entity Type: _____

Contact Name: _____ Telephone: _____ Email: _____

Any individual signing below hereby certifies they are an authorized representative of Proposer and that:

1. If awarded a Contract, Proposer agrees to perform the scope of work and meet the performance standards set forth in the final negotiated scope of work of the resulting Contract.
2. I have knowledge regarding Proposer's payment of taxes and by signing below I hereby certify that, to the best of my knowledge, Proposer is not in violation of any tax laws of the state or a political subdivision of the state, including, without limitation, ORS 305.620 and ORS chapters 316, 317 and 318.
3. Proposer does not discriminate in its employment practices with regard to race, creed, age, religious affiliation, gender, disability, sexual orientation, national origin. When awarding subcontracts, Proposer does not discriminate against any business certified under ORS 200.055 as a disadvantaged business enterprise, a minority-owned business, a woman-owned business, a business that a service-disabled veteran owns or an emerging small business. If applicable, Proposer has, or will have prior to contract execution, a written policy and practice, that meets the requirements described in ORS 279A.112, of preventing sexual harassment, sexual assault and discrimination against employees who are members of a protected class. HECC may not enter into a contract with an anticipated contract price of \$150,000 or more with a Proposer that does not certify it has such a policy and practice. See <https://www.oregon.gov/DAS/Procurement/Pages/hb3060.aspx> for additional information and sample policy template.
4. Proposer and Proposer's employees, agents, and subcontractors are not included on:
 - A. the "Specially Designated Nationals and Blocked Persons" list maintained by the Office of Foreign Assets Control of the United States Department of the Treasury found at: <https://www.treasury.gov/ofac/downloads/sdnlist.pdf>, or
 - B. the government-wide exclusions lists in the System for Award Management found at: <https://www.sam.gov/SAM>
5. Proposer certifies that, to the best of its knowledge, there exists no actual or potential conflict between the business or economic interests of Proposer, its employees, or its agents, on the one hand, and the business or economic interests of the State, on the other hand, arising out of, or relating in any way to, the subject matter of the RFP. If any changes occur with respect to Proposer's status regarding conflict of interest, Proposer shall promptly notify the State in writing.
6. Proposer certifies that all contents of the Proposal (including any other forms or documentation, if required under this RFP) and this Proposal Certification Sheet are truthful and accurate and have

been prepared independently from all other Proposers, and without collusion, fraud, or other dishonesty.

7. Proposer understands that any statement or representation it makes, in response to this RFP, if determined to be false or fraudulent, a misrepresentation, or inaccurate because of the omission of material information could result in a "claim" (as defined by the Oregon False Claims Act, ORS 180.750(1)), made under Contract being a "false claim" (ORS 180.750(2)) subject to the Oregon False Claims Act, ORS 180.750 to 180.785, and to any liabilities or penalties associated with the making of a false claim under that Act.
8. Proposer certifies it will comply with the Pay Equity law, ORS 652.220, if applicable.
9. Proposer is registered in the State's electronic procurement system, OregonBuys, found here: <https://oregonbuys.gov/bsa/>. (Registration is free by clicking the blue "Register" button on the top right corner of the webpage.)

Authorized Signature

Date

(Printed Name and Title)