



OregonWaveEnergy  
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# Request for Proposals

## ***Territorial Sea Plan***

Stakeholder Engagement Grant Program

Distributed: January 6, 2012

Due: January 31, 2012

Submit proposals electronically to:

Oregon Wave Energy Trust

Attn: Operations Manager

[rfp@oregonwave.org](mailto:rfp@oregonwave.org)

Refer questions to:

Maegan Hollister

(503) 283-9067 phone

[mhollister@oregonwave.org](mailto:mhollister@oregonwave.org)



January 6, 2012

Subject: Request for Proposal (RFP)

Dear Potential Partner:

The Oregon Wave Energy Trust (OWET) has attached for your consideration an RFP that has been distributed to a variety of organizations. This RFP solicits your participation in a competitive bid process, potentially yielding the opportunity for your organization to receive supplemental funding to support its direct and ongoing engagement in the State of Oregon's current effort to revise the Territorial Sea Plan (TSP) to accommodate ocean energy.

The successful applicant will work collaboratively with OWET and other stakeholders to create a TSP that balances our shared goal of protecting Oregon's marine environment and its users with the reasonable accommodation of responsible ocean energy development in Oregon.

There will be only one round of competitive bidding; therefore your response to this RFP should be considered your definitive response.

To ensure comparability of RFP responses, guidelines regarding the format of responses are detailed in the RFP. We urge that all firms adhere to these guidelines as failure to do so may disqualify your bid.

Thank you for your interest.

Sincerely,  
Jason Busch  
Executive Director  
Oregon Wave Energy Trust

# **PART 1: CONTRACT REQUIREMENTS**

## **1. SCOPE OF WORK**

Responsibilities:

- Participate in the Territorial Sea Plan (TSP) revision process to provide knowledge, information and expertise relating to ocean and coastal related matters.
- Work with local stakeholders to improve public understanding of the state's efforts and purpose of revising the TSP.
- Respond to requests for information from the state's planning bodies, including the Territorial Sea Plan Working Group (TSPWG), the Territorial Sea Plan Advisory Council (TSPAC), the Ocean Planning Advisory Council (OPAC), and Department of Land Conservation and Development (DLCD).
- Provide written reports as required by the OWET contract with the recipient.

Background:

OWET Strategic Action - Fund Oregon based organizations actively working to complete a territorial sea plan that accommodates ocean energy.

OWET has made funding available to one or more organizations that wish to participate in the current effort to develop the state's Territorial Sea Plan to accommodate ocean energy. The solicitation will be available beginning January 6, 2012, and closes January 31, 2012, or until all funds have been committed. Proposals will be evaluated in the order they are received. Applicants must meet the eligibility criteria and program requirements.

About OWET:

Oregon Wave Energy Trust (OWET) – with members from fishing and environmental groups, industry and government – is a nonprofit public-private partnership funded by the Oregon Innovation Council since 2007. Its mission is to promote the responsible development of ocean energy in Oregon. We serve as a connector for all stakeholders involved in wave energy project development – from research and development to early stage community engagement, final deployment and energy generation and job creation – positioning Oregon as the North America leader in this nascent industry and delivering its full economic and environmental potential for the state. OWET's goal is power two Oregon communities with ocean energy by 2025. For more information: [www.oregonwave.org](http://www.oregonwave.org)

## **2. PROJECT FUNDING**

OWET has allocated up to \$80,000 for this service. Current funding for this service is provided through the Oregon 2011-2013 biennial Oregon Innovation Council budget and will need to be expended by June 30, 2013. OWET reserves the right to re-allocate this funding if a satisfactory candidate for this service is not determined or the services are no longer needed.

## **3. ELIGIBILITY & REQUIREMENTS**

The following outlines the program criteria and options for OWET's Territorial Sea Plan Stakeholder Engagement Grant Program for wave energy development in Oregon. Recipient will participate in the State of Oregon's effort to revise the Territorial Sea Plan (TSP), represent the

recipient's interests, and work in good faith with OWET and other stakeholders to create a TSP that protects Oregon's marine environment and its users, while accommodating the creation of a responsible ocean renewable energy industry in Oregon.

- The organization must be located in Oregon.
- The organization's membership must have a demonstrable interest in ocean renewable energy and its development in Oregon's territorial sea.
- Preference will be given to those organizations that provide matching funds.
- Costs incurred prior to January 31, 2012 are not eligible.
- Applicant will be subject to contract terms including reporting requirements and audit procedures developed by OWET.
- All OWET funded components of any project will be accessible to the public.
- Use of local contractors and businesses is preferred.
- Preference will be given to companies with demonstrated expertise and experience.
- All financial awards are subject to OWET Board approval.
- Qualified expenditures include the following:
  - Costs of travel and participation at official Territorial Sea Plan meetings hosted by the State of Oregon, or one of its agents, including the Territorial Sea Planning Working Group, Territorial Sea Plan Advisory Council, and Ocean Planning Advisory Council.
  - Costs associated with organizational meetings that deal primarily with the TSP or ocean energy.
  - Expenses associated with studies or research.
  - Outreach to associated stakeholders.
  - Official business associated with participation on one or more of the state's planning groups.
  - Efforts associated with the organizations work focused primarily on the Territorial Sea Plan process or ocean energy.

#### 4. DELIVERABLES

- Immediate participation in the TSP process upon execution of a contract with OWET.
- Reporting requirements as provided in the OWET contract.
- Contact list of all stakeholders engaged.

#### 5. PERIOD OF PERFORMANCE

Selected awardees must be under contract with OWET no later than March 15, 2012. Grant performance period will be upon signature of contract through June 30, 2013. Continuance of performance for 2013 is contingent on OWET funding.

# PART 2: PROPOSAL PREPERATION AND SUBMITTAL

## 1. PRE-SUBMITTAL MEETING

There will be an open-invitation conference call for interested parties to ask clarifying questions on **January 13, 2012 at 1:00 pm** Pacific Standard Time. Instructions for the call will be sent to participants who indicate their intent to participate by email to [rfp@oregonwave.org](mailto:rfp@oregonwave.org) 24 hours prior to the call.

## 2. RFP CLARIFICATION

Questions and requests for clarification regarding this Request for Proposal (RFP) must be directed via email to the person listed below. The deadline for submitting such questions/clarifications is **January 27, 2012, 5:00 p.m.** Pacific Standard Time. An addendum will be issued no later than 72 hours prior to the proposal due date, to all recorded holders of the RFP if a substantive clarification is in order.

Maegan Hollister  
Program Manager  
Oregon Wave Energy Trust  
[rfp@oregonwave.org](mailto:rfp@oregonwave.org)

## 3. PROPOSAL SUBMISSION

For purposes of review and in the interest of sustainable business practices in general, OWET requires electronic submission via email to: **[rfp@oregonwave.org](mailto:rfp@oregonwave.org)**. Proposals must be received by email no later than the date specified on the cover of this solicitation, and shall plainly identify the subject of the proposal and the name, phone, email, and address of the bidder.

It is the bidders responsibility to ensure that the proposals are received prior to the specified closing date. Proposals received after the specified closing date shall not be considered and will be returned to the bidder. OWET shall not be responsible to the proper identification and handling of any proposals submitted to an incorrect location.

### PROPOSAL

Proposals must be clear, succinct and shall not exceed 10 pages. Section dividers, title page, and table of contents do not count in the overall page count of the proposal. Bidders who submit more than the pages indicated may not have the additional pages of the proposal read or considered. Exclusions to the page limitation may include relevant work samples.

Each bidder is required to provide the deliverables described below as part of their proposal. Bidders are asked to answer and/or respond to all components to the best of their ability as the information provided will be evaluated and scored by OWET's Evaluation Team. As such, missing elements and/or response will adversely impact a bidders overall score.

### ORGANIZATION OF RESPONSE

- Single-spaced pages when printed on 8.5" x 11" paper with 1-inch margins (top, bottom, left and right) with Times New Roman font not smaller than 11 point.
- All proposal components (described below) must be included in your proposal.

- The total number of pages must not exceed 10 pages (not including appendices). There is no penalty for brevity of the information requested below.
- The proposal must be submitted as a PDF document with all pages numbered.

#### Proposal Components:

##### 1. Cover Letter

Provide a cover letter confirming your organization's commitment to implementing this initiative (e.g. senior management approval, etc.). Also, include contact information for the point of contact for your organization and/or the project manager, including the person's name, title, address, phone number and email address.

##### 2. Table of Contents

Include a table of contents delineating the sections and appendices of your proposal. Pages are to be numbered consecutively.

##### 3. Executive Summary

Summarize your company's recommended approach to this RFP and highlight any competitive advantages or unique attributes of your firm. Include any additional information that will assist OWET in the selection process.

##### 4. Implementation Plan and Schedule

Bidders must provide a concise, yet detailed implementation plan for managing the scope, schedule, budget and overall quality of work conducted in this RFP. The implementation plan must also include your most aggressive time line showing implementation starting from contract execution. This time line must include all major tasks and their sequence, inter-relationships and dependencies between tasks and key milestones and deliverables.

##### 5. Detailed Budget

Bidders must provide an itemized project budget to produce the deliverables described in this RFP. This should include all costs such as personnel (identify estimated hours and rate), administrative overhead, travel, materials, equipment, and any other anticipated expenditures required to complete the work described in this RFP.

##### 6. Project Team Structure and Team Qualifications

Please provide the following:

- Project team organization chart illustrating the reporting structure of the team, including a brief description of the role of each team member
- Description of the experience, skill or unique attribute of each team member (not to exceed 2 pages per individual. Alternatively, a 2-page resume is acceptable.)
- Brief description of two recently-completed engagements (not to exceed 2 pages for each project) that illustrate your firms' capabilities and/or qualifications of the project team ability to complete the work described in this RFP.

##### Subcontractors:

Bidders must identify in their submission which portions of the proposal will be assigned to subcontractors, if any. Any subcontractors to be included in this project must be identified and included as part of #4 above. The Bidder will be required to not subcontract, assign, or transfer any listed responsibilities, without prior review and written consent of OWET.

# PART 3: PROPOSAL EVALUATION

## 1. PROCESS & SCHEDULE

The following describes the overall sequence of events following the closing date of the RFP:

- The OWET Operations Manager will collect and assemble all proposals received by the RFP deadline.
- A qualified evaluation team will be convened to conduct detailed evaluation of all proposals.
- The evaluation process will take place as follows: The Evaluation Team will use a standardized scoring matrix, utilizing the criteria below, to assess each written proposal. Upon completion of the evaluation process, the Operations Manager will compile the scores from all team members and for all proposals to generate each bidder's cumulative score.

Schedule of RFP events:

- RFP Release: 1/6/12
- Pre-Submittal Meeting: 1/13/12, 1:00 p.m.
- Clarification Due: 1/27/12, 5:00 p.m.
- RFP Close: 1/31/12, midnight
- Evaluation Period: 2/1/12 – 2/10/12
- Applicant Notification: By 5:00 p.m. 2/15/2012
- Awardee Contract Execution Period: 2/16/2012 – 3/1/2012
- Award Expiration: 3/15/12
- Performance Period: Upon contract signature through 6/30/2013

## 2. CRITERIA

The criteria that will be included in the scoring matrix for all written proposals includes the following categories:

### 1. Approach (Weighted 40%)

Bidders will be evaluated on the clarity of their approach to this project, including strategies for overcoming any potential obstacles. Please include any ideas for creative, cost effective ways to accomplish the defined tasks and/or providing results that add value to developing the wave energy industry. Also, strategies for involving stakeholders is a plus.

### 2. Cost Effectiveness (Weighted 30%)

All bidders will be evaluated on the pricing proposals submitted with their responses to this RFP. Pricing should reflect the bidder's best offer for the services included in this RFP.

### 3. Project Team (Weighted 20%)

Qualifications and experience of those who will do the work. The degree to which team members are qualified by education, training, or experience to execute the proposed activity; their record of achievement with previous projects. Also include, if available:

- a) Experience with similar projects
- b) Expertise or knowledge in the wave energy industry
- c) Understanding of technical issues associated with the proposed tasks

#### 4. Project Management (Weighted 20%)

- a) Ability to complete the project and provide the deliverables within the performance period.
- b) Proven project management experience.
- c) Proposed project management strategies for this project.
- d) Communication strategies for internal and external information dissemination throughout the project. Describe the degree to which OWET representatives and users or potential users of the results of this project will be brought into the planning of the tasks, brought into the execution of the tasks, and/or will be kept apprised of progress and results.

### 3. GENERAL SOLICITATION GROUND RULES

- Response to this RFP does not commit OWET to award a contract or to pay any costs incurred during the preparation of the proposal.
- OWET reserves the right to analyze proposals in detail, and to award contracts which OWET believes to be in our best interest.
- OWET reserves the right to reject any or all of the proposals for completing this work. OWET also reserves the right to cancel or reissue the RFP at any time.
- OWET reserves the right to eliminate the need for the selected firms to complete one or more tasks, pending the outcome of preceding related tasks or issues, and/or the availability of project partners to complete that task.
- OWET reserves the right to modify the final scope of work and deliverables prior to finalizing a contractual agreement with the selected firm.
- Subsequent procurement, if any, will be in accordance with an executed contract. This RFP and any response may, at OWET's option, become part of the executed contract.
- All firms participating in this RFP process will be notified of acceptance or rejection. OWET reserves the right not to disclose reasons for the rejection. OWET is not obligated to accept any proposal with the lowest cost.
- No publicity or news release about this RFP, response to this RFP, discussion of any kind related to this RFP, or the award of any contract related to the bid document, may be released without OWET's prior written approval.
- All materials submitted by the bidding firms become the property of OWET. OWET reserves the right to retain copies of all proposals for historical records and documentation.
- This RFP and other bid documents furnished by OWET may include errors, omissions, or deficiencies, and the accuracy and completeness of these documents is not guaranteed. In the event that the bidding Firms discovers errors, omissions, or deficiencies, the Firms shall promptly notify OWET after discovery.
- Each Bidder agrees to comply with all federal regulations including those pertaining to non-discrimination in hiring and employment practices.
- Please note that OWET owns all rights to the deliverables and work resulting from this RFP and intends to make all information/results available to the public