



## REQUEST FOR PROPOSALS

### SUBSTITUTE EMPLOYEE STAFFING SERVICES

Submission Deadline: June 7th, 2018  
12:00 p.m., PST

Proposals must be received in the District Office by 12:00 p.m., PST on Thursday, June 7, 2018 for consideration. Three (3) hard copies and one (1) electronic copy of the proposal are required. In addition, selected **applicants must be available to make a presentation on their proposal in the afternoon on June 13, 2018.**

Please direct proposals to: Julie Hansen  
Business Department  
Lebanon Community School District  
485 S. 5<sup>th</sup> Street  
Lebanon, OR 97355  
[julie.hansen@lebanon.k12.or.us](mailto:julie.hansen@lebanon.k12.or.us)

Lebanon Community School District  
485 S. 5th Street | Lebanon, Oregon 97355

## **INTRODUCTION**

The Lebanon Community School District (the “District”) is requesting competitive sealed proposals with the intent of entering into a contract with a firm able to provide qualified substitute personnel.

**This is a qualifications-based selection with cost as a consideration.**

Factors such as contractor past performance, technical expertise and experience, management capabilities and resources, will form the basis for the criteria to be considered, in addition to price to perform the scope of work. Award shall be made in accordance with the terms conditions, and requirements stated herein.

## **DISTRICT INFORMATION**

The Lebanon Community School District serves the city and surrounding area of Lebanon, Oregon. The district provides a full range of educational services to more than 4,200 students in grades kindergarten through twelve. District facilities include six elementary schools, one middle school and one high school, plus administrative and support services buildings.

## **SCOPE OF WORK**

The District is seeking proposals from firms hereafter called “Proposer(s)” who can provide temporary staffing services providing substitute employees for certified (licensed) and classified staff to fill vacancies for when District employees are absent or positions are vacant. The District has approximately 229 certified and 293 classified staff. The majority of the certified positions would require substitutes should employees be absent while only 201 classified employees would be eligible for substitutes due to absence.

The Substitute Employee Service Provider will:

- Recruit, screen, interview, and assign its employees (“assigned employees”) to perform duties as specified by the District;
- Collect and process all required information for new hire employee substitutes;
- Pay the assigned employees’ wages and provide them with the benefits that Contractor agrees to pay or provide to them;
- Perform all payroll functions including withholding and transmitting payroll taxes, unemployment insurance, and workers compensation payments;
- Process unemployment insurance and workers compensation claims involving assigned employees;
- Grant paid and unpaid leave time pursuant to federal and state law and Contractor’s policies and procedures;
- Review and resolve claims by assigned employees for reasonable accommodation (ADA);
- Support district with and coordinate assigned employees’ use of substitute placement and calling software application (Frontline Absence Management – formerly AESOP) including providing training to assigned employees on use of substitute employee system, and extracting information for payroll processing;
- Provide or secure necessary and/or required training for all assigned employees including child abuse training, blood-borne pathogen training, sexual harassment training, sexual conduct (misconduct) training, and any other district required trainings.
- Ensure all assigned employees possess all required licenses and certifications prior to assignment in the district;

- Maintain and update records of certificates, trainings and licenses as mandated by federal and state law and District requirements for all assigned employees.
- Ensure all assigned employees who will have direct, unsupervised contact with students have required background checks and fingerprinting completed prior to assignment in the district;
- Coordinate with the District the preparation of all federal and state reports regarding substitute/temporary employees and/or district contractors;
- Oversee and manage evaluative and disciplinary manners for assigned employees;
- Communicate regularly with District staff regarding any concerns and attend team meetings with district personnel as requested by the District;
- Monitor fill rates and provide reports to the District on a regular basis to ensure that the District’s needs are being met (with the goal that services provided meet 100% fill rate on a regular basis); and
- Pay assigned employees no less than the salary/daily rate/hourly wage they earned in the District during the 2017-18 fiscal year.

**SCHEDULE OF EVENTS**

Publish and Advertise RFP	May 10, 2018
Questions and RFP Protests Due	May 31, 2018 / 5:00 p.m.
Proposals Due	June 7, 2018 / 12:00 p.m.
Proposal Evaluation	June 11-14, 2018
Interviews with Selection Committee (if necessary)	June 13, 2018
Notice of Intent to Award	June 15, 2018
Commencement of Services	July 1, 2018

**PROPOSAL CONTENT AND FORMAT**

To simplify and expedite the review process, Proposers must prepare and submit their proposals in a standard format as follows:

- **Title Page**  
Proposer should identify the RFP subject, name of the agency, company or firm, local address, telephone number, fax number, name and title of contact person, date of submission, and period for which the proposal is effective.
- **Table of Contents**  
The table of contents should include a clear and complete identification by section and page number of the material submitted.

- **Transmittal Letter**

Each response must contain a cover letter on the letterhead of the agency, company or firm submitting a response and should include as a minimum the following:

- A brief statement of the Proposer's understanding of the objective of the services to be performed;
- A positive commitment to perform the services within the time period specified; and
- The names of persons authorized to represent the Proposer and communicate with the District's staff, including their titles, addresses and telephone numbers (if different from the individual who signs the transmittal letter).

- **General Information**

- Name of Proposer (agency, company or firm)
- Address
- Federal Employer Identification Number
- Licenses held by your agency, company or firm and your employees
- Length of time conducting business in Oregon
- Whether you are a local, regional, national or international operation
- Whether the agency, company or firm has been the object of any disciplinary action or pending action during the past three (3) years with state regulatory bodies or professional organizations. If yes, please provide information on the circumstances and action status.

- **Service Staff**

List the key individuals who make up the team overseeing this work, identify their roles, and describe their relevant qualifications and experiences with Proposer's business. All key team members must be listed. This information is required in addition to any detailed resumes the Proposer submits.

- **Experience**

Explain your understanding of the scope of work and your agency, company or firm's role and experience in providing requested services. List and describe your experience working with local, state and federal agencies.

- **References**

Provide three (3) professional references from other school districts including the name of your team members for whom this reference is relevant, scope of work, engagement start and end dates and a contact name and phone number of the school district which hired your agency, company or firm.

- **Specific Work Plan**

Submit a work plan to accomplish the scope of work defined in this RFP. The work plan must include:

- how you will ensure the specified services are timely and appropriately provided including continued overall evaluation of services and evaluation of specific substitute employee performance;
- methodologies and procedures you will use to transition the service from the District to your agency, company or firm and how you will initiate and complete the identified work;
- any anticipated potential problems and actual and/or anticipated approaches to resolving these problems; and
- list and describe your past record providing similar services in a timely and efficient manner.

- **Costs and Fees**

- Provide a fee schedule or other description of each fee involved for each of the services requested in this RFP.
- Discuss the frequency in which these fees will be evaluated and the maximum amount of any increase(s) to be expected during the term of the proposed service contract.
- Check the Selection and Evaluation section of this RFP carefully to be sure all questions regarding costs and fees have been addressed in your proposal.

- **Additional Information**

Provide your agency, company or firm's ownership status and employment practices regarding minority, women and emerging small business or historically underutilized businesses.

Provide your agency, company or firm's availability to commence requested services and familiarity with the District's and district schools' locale.

Provide a description of any claims arising during the last five years which concerned the services provided by the Proposer or the principles or key employees of the Proposer who will be assigned to provide services to the District. Claims should be disclosed regardless of whether they involve litigation, arbitration or other formal dispute resolution processes. Describe the nature and the outcome or current status of each claim, including any liabilities and expenses resulting from the claim.

Provide any additional substantive information not specifically requested in this RFP that you feel is essential in evaluating your agency, company or firm's ability to perform the requested services. Please describe any alternative or "value added" services that you are capable of providing that may benefit the District.

- **General Conditions**

Describe your general conditions for this project.

Each proposal must be signed by the proposer (if the proposer is an individual), by an authorized representative of the proposer (if the proposer is a business entity), or by a representative of each partner or joint venture member, if the proposer is a partnership or joint venture, and must include a copy of a signed original of **Attachment A**, in which the proposer certifies that it meets all minimum requirements of this RFP, that the proposer has not colluded with any other proposer in the preparation of its proposal, and that the proposer agrees to be bound by the terms and pricing of its proposal, including all attachments.

**PROPOSAL SUBMISSION**

Submit one original (marked as such), two copies, and one PDF copy on a USB flash drive by the proposal due date and time listed in this document to:

Julie Hansen  
Business Department  
Lebanon Community School District  
485 S 5<sup>th</sup> Street  
Lebanon, OR 97355 (in person or by mail)

Proposals must be submitted in a sealed envelope that is plainly marked “RFP for Substituted Employee Staffing Service – Lebanon Community School District” and bears the proposer’s name, address, telephone number, and email address.

The District may reject any submittal not in compliance with all prescribed public bidding procedures and requirements, and may cancel this solicitation or reject for good cause, all responses upon finding by the District that it is in the public interest to do so.

**Responses received after the closing date and time will not be considered.**

**SELECTION AND EVALUATION PROCESS**

A selection committee comprised of District employees will evaluate each proposal to determine the one that is most advantageous to the District based on the evaluation criteria outlined in this RFP. Proposals submitted that do not meet minimum requirements will not be rated. Proposers may be invited to an interview on June 13, 2018 with the District’s selection committee. The committee will consider the merit of information presented in the written responses and is not obligated to conduct further investigation. Proposers are cautioned to make their responses clear and complete.

## **EVALUATION CRITERIA**

All proposals from qualified Proposers that provide the minimum required qualifications will be evaluated on the following criteria:

### **1. Background and Qualifications - 35 points**

Consideration will be given to Proposers demonstrating strong capabilities, experience and reputation in undertakings similar to those described in this RFP and providing authoritative documentation of their financial soundness and stability:

- Information about the organization's business philosophy and long term involvement with K -12 public education.
- Information about the organization's structure and capacity to meet the District's requirements.
- Existing local Oregon branch.
- Experience of each of the individuals listed as lead personnel.
- Annual reports of financial statements covering the most recent fiscal year.
- Disclosure of relevant pending regulatory oversight/corrective action and other pending litigation.
- Prior relevant work experience included in the proposal including the following information: *Customer's Name, Type of Contract, Name and Telephone Number of Reference, Brief Description of the Services Provided, Date( s) of Services Provided, Scope of Services Provided*

### **2. Project Implementation - 35 points**

Proposals will be evaluated on the soundness and detail of presentation of transition and implementation strategies proposed. Proposals must describe a complete scope of work and detailed descriptions.

- Describe in detail the transition time line from District to agency/company/firm services with narratives depicting major work activities.
- Provide an organizational chart with reporting responsibilities of the local branch personnel.
- Identify your organization's service team along with a resume for each individual who will provide work on this project.
- Describe your ability to accommodate custom data/report requests from the District.
- Describe how you will communicate with and receive feedback from District personnel.
- Describe how you will evaluate services provided to the District and how that evaluation will be presented to the District. Describe the number of service and other evaluations completed and reported each fiscal year.

### **3. Financial Terms - 30 Points**

Consideration will be given to proposals which responsibly maximize the net economic benefit to and minimize the risk for the District over the term of the proposed contract:

- Total annual (fiscal year) cost for commencing and providing services (include any one-time initiation fees and deposits);
- Total annual cost for system management, support, and training;
- Total annual payroll costs; and
- Any other fees or assessed costs for providing requested services.

The selection committee will add together the points that each committee member assigns and divide the total points by the total number of selection committee members to compute average score for the evaluation questions. The award of this solicitation will be made by the District based on the proposal which, in the selection committee's sole and absolute judgment, will best serve the interests and needs of the District.

#### **RESPONSIBILITY EVALUATION**

The District will investigate a proposer's responsibility and will consider information obtained from any source as part of its evaluation, at any time prior to execution of the contract. Submission of a signed proposal constitutes the proposer's approval for the District to obtain any information the District deems necessary to conduct the evaluation including, but not limited to, information discovered during reference checks. The District may postpone the award or execution of the contract after the announcement of the Apparent Successful Proposer in order to complete the District investigation.

#### **TERMS AND CONDITIONS**

The District expects to enter into a contract with the Apparent Successful Proposer; however, the District does not guarantee that it will award any contract pursuant to this RFP. While this RFP provides instructions for the preparation of a proposal that will address all RFP requirements, the District reserves the right to reject any and all proposals. This RFP is not an offer to contract. Only the execution of a written contract will obligate the District, in accordance with the terms contained in the contract.

#### **QUESTIONS**

All questions and contacts with the District regarding any information in this RFP must be addressed in written form via email to Julie Hansen, Business Department at [julie.hansen@lebanon.k12.or.us](mailto:julie.hansen@lebanon.k12.or.us).

#### **SOLICITATION PROTESTS**

Respondents may submit a written request for clarification or change or protest of particular solicitation provisions and specifications and contract terms and conditions (including comments on any specifications that a firm believes limits competition). Such requests or protests must state the reasons for the request or protest and any proposed changes to the solicitation provisions and specifications and contract terms and conditions., and must be received by the date and time indicated in the schedule of events.

**CHANGES OR MODIFICATIONS**

The District reserves the right to amend this RFP in any manner prior to award of a contract. Any change or modification to the specifications or the procurement process will be in the form of an addendum to the RFP and will be made available to all firms via email. No information received in any manner different than as described herein will serve to change the RFP in any way, regardless of the source of the information. Any request for clarification or change or protest of anything contained in an addendum must be received by the date and time stated in the addendum, or they will not be considered.

**SELECTION PROTESTS**

Any respondent to this RFP who claims to have been adversely affected or aggrieved by the selection of a competing respondent may submit a written protest of the selection within seven days after notification of that selection to:

Julie Hansen  
Business Department  
Lebanon Community School District  
485 S 5<sup>th</sup> Street  
Lebanon, OR 97355  
Email: julie.hansen@lebanon.k12.or.us

Any such protests must be received no later than seven days after the notification of selection has been made in order to be considered. The selection decision notification will be made via email.

**PROPRIETARY INFORMATION**

The District will retain this RFP and one copy of each original response received, together with copies of all documents pertaining to the award of a contract. These documents will be made part of a file or record, which will be open to public inspection after responder selection and award is announced. If a response contains any information that is considered a trade secret under ORS 192.501(2), mark each sheet with the following legend: "This data constitutes a trade secret under ORS 192.501(2), and must not be disclosed except in accordance with the Oregon Public Records Law, ORS Chapter 192."

The Oregon Public Records Law exempts from disclosure only bone fide trade secrets, and the exception from disclosure applies only "unless the public interest requires disclosure in the particular instance". Therefore, non-disclosure of documents or any portion of a document submitted as part of a response may depend upon official or judicial determination made pursuant to the Public Records Law.

In order to facilitate public inspection of the non-confidential portion of the response, material designated as confidential must accompany the response, but must be readily

separable from it. Prices, makes, model or catalog numbers of items offered, scheduled delivery dates, and terms of payment will be publicly available regardless of any designation to the contrary. Any response marked as a trade secret in its entirety will be considered non-responsive and will be rejected.

**CERTIFICATION OF COMPLIANCE OF WITH TAX LAWS**

By submission of your proposal, the signatory (a duly authorized representative of the submitting firm) must certify that the firm is not, to the best of their knowledge, in violation of any Oregon tax law. For purpose of this certification, "Oregon Tax Laws" means a state tax imposed by ORS 320.005 to 320.150 and 403.200 to 403.250, ORS Chapters 118, 314, 316, 317, 318, 321 and 323; the elderly rental assistance program under ORS 310.630 to 310.706; and local taxes administered by the Oregon Department of Revenue under ORS 305.620.

**INSURANCE PROVISIONS**

During the term of the resulting contract, the successful proposer will be required to maintain in full force, at its own expense, from insurance companies authorized to transact business of insurance in the state of Oregon, each insurance coverage/policy as set forth in public relations/communication services agreement.

**ESB/MBE/WBE**

The District is committed to increasing opportunities for Emerging Small Businesses and Minority and Women Owned Businesses, and the District strongly encourages its consultants to utilize these businesses in providing services and materials for the District contracts and projects.

**ADDITIONAL REQUIREMENTS**

Pursuant to OAR 580-061, by submitting a proposal, the proposer certifies that the proposer has not discriminated against Minority, Women or Emerging Small Business Enterprises in obtaining any required subcontracts.

Pursuant to OAR 580-061-0040, proposers are hereby notified that policies applicable to consultants and contractors have been adopted that prohibit sexual harassment and that proposers and their employees are required to adhere to the District's policy prohibiting sexual harassment in their interactions.

**ATTACHMENTS**

- **Attachment A – Proposer Certifications (REQUIRED)**

**END OF RFP**

## **ATTACHMENT A**

### **PROPOSER CERTIFICATIONS**

The undersigned offers and agrees to provide substitute employee staffing services to the Lebanon Community School District, in accordance with this Request for Proposals. The undersigned further certifies that he/she has read, understands, and agrees to abide by all terms and conditions of this Request for Proposals if awarded the contract for these services.

The term of the contract will be from the date executed through the end date specified within the contract (three years). The District may amend the contract to include subsequent time periods if mutually agreed. The District reserves the right to cancel the contract, after providing 90 days written notice of intent to cancel. The District shall not incur any penalties or damages for cancellation.

### **ADDITIONAL REPRESENTATIONS**

1. The undersigned certifies the proposal is offered by an independent contractor as defined in ORS 670.600 or an established business, firm, or agency.
2. The proposer, if an individual, is of lawful age; is the only one interested in this proposal; and that no person, firm, or corporation, other than that named, has any interest in the proposal or in the proposed contract.
3. The proposal, if submitted by a joint venture is in the name of the joint venture and all parties have examined this RFP including all requirements and contract terms and conditions thereof, and, if successful, the joint venture shall execute a contract, which incorporates the stated requirements, proposal response and terms and conditions.
4. By submitting a response, the proposer certifies that no relationship exists between the proposer and the District that interferes with fair competition or is a Conflict of Interest, and no relationship exists between the proposer and another person or firm that constitutes a Conflict of Interest.
5. The proposer has examined all parts of this RFP, including all requirements and contract terms and conditions thereof, and, if successful, the proposer shall execute a contract, which incorporates the stated requirements, proposal response and terms and conditions.
6. The proposer fully understands and agrees that Proposer is responding to this RFP solely at its own expense and that the District is not responsible for any expenses of Proposer associated with the RFP.

### **PROPOSAL PRICING**

The undersigned hereby proposes to furnish to the District all materials, services, and labor necessary to perform all work for the District in strict accordance with the terms, conditions, and requirements as specified in the Request for Proposal. The undersigned agrees to honor this price for 90 days from date of signature below.

**CERTIFICATION OF NON-DISCRIMINATION**

The Proposer agrees not to discriminate against any client, employee or applicant for employment or for services, because of race, color, religion, sex, national origin, physical or mental handicap, sexual orientation or age unless based upon bona fide occupational qualifications with regard to, but not limited to, the following: employment upgrading; demotion or transfer; recruitment or recruitment advertising; layoffs or termination; rates of pay or other forms of compensation; selection for training; and/or rendition of services. It is further understood that any Proposer who is in violation of this clause shall be barred from receiving awards of any subsequent contracts from the District unless a satisfactory showing is made that discriminatory practices have terminated and that a recurrence of such acts is unlikely.

**ACKNOWLEDGEMENT OF RECEIPT OF ADDENDA**

If addenda were issued, completion of this line is REQUIRED AND SIGNED COPIES ARE TO BE INCLUDED IN THE PROPOSAL SUBMISSION.

Addenda \_\_\_\_\_ through \_\_\_\_\_ received.

**RESIDENT BIDDER (PROPOSER) STATUS**

A resident bidder is defined in ORS 279A.120 as a bidder that has paid unemployment taxes or income taxes in Oregon during the 12 calendar months immediately preceding submission of the bid, has a business address in this state and has stated in the bid that they are a resident bidder. The undersigned bidder must check the appropriate box above as to their bidder status.

Resident Bidder \_\_\_\_\_ Yes \_\_\_\_\_ No

**PROPOSER'S SIGNATURE AND IDENTIFICATION**

The undersigned hereby certifies to the truth and accuracy of all statements, answers and data contained in this proposal and application, and hereby authorizes the District to make any necessary examinations or inquiries in order to make a determination as to the qualifications and responsibility of the proposer. 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.

I hereby certify that this Proposal is genuine and that I have not entered into collusion with any other vendor(s) or any other person(s). Please print or type all information requested below (except where signature is required).

Proposer Name: \_\_\_\_\_  
By: \_\_\_\_\_  
Title: \_\_\_\_\_  
Date: \_\_\_\_\_