

REQUEST FOR QUOTES (RFQ) #2023-20

Issue Date: July 14, 2023

Project Name:	OMIC R&D Fractional CIO and Technology Advisor Services		
Quote Due Date/Time:	August 4, 2023 at 1:00 PM Pacific Time		
Mandatory, Virtual Pre-Bid Conference:	July 26, 2023 from 3:30 PM to 5:00 PM Pacific Time via TEAMS ❖ Please RSVP to Vivian.Chen@oit.edu by 5:00 PM Pacific Time on Monday, July 24, 2023 , if you plan to attend the Mandatory, Virtual Pre-Bid Conference so that Oregon Tech may arrange logistics and provide your firm with a TEAMS link.		
Project Coordinator:	Craig Campbell	Phone:	503-821-1329
		Email:	Craig.Campbell@oit.edu
Contract Coordinator:	Vivian Chen	Phone:	503-821-1266
		Email:	Vivian.Chen@oit.edu

SUBMIT QUOTES VIA EMAIL TO PURCHASING@OIT.EDU

**PLEASE NOTE: EMAIL SUBMISSIONS SHOULD HAVE
“RFQ #2023-20” IN THE SUBJECT LINE**

1. ANNOUNCEMENT AND SPECIAL INFORMATION

Quoters are required to read and understand and comply with all information contained within this Request for Quotes (“RFQ”). All quotes, including any price quotations, are binding upon quoter for sixty (60) calendar days from the Quote Due Date. All payments for services will be paid in accordance with Oregon Revised Statute (ORS) 293.462. Quotes received after the Quote Due Date/Time indicated above will not be considered, unless it is in the best interest of the university to do so. If authorized in this RFQ, resulting contract, travel, and other expenses will only be reimbursed in accordance with the Oregon Institute of Technology (“Oregon Tech”) Contractor’s Travel Reimbursement Policy in effect at the time the expense is incurred.

It will be the responsibility of the quoter to refer daily to the Oregon Public Universities Business and Bid Opportunities website (<https://www2.wou.edu/nora/orpu.bid.home>) to check for any available addenda, response(s) to clarifying questions, cancellations, or other information pertaining to this RFQ.

2. SCOPE

The purpose of this RFQ is to solicit quotes from a vendor to assist in the development of a strategic Information Technology/Audio Visual (“IT/AV”) development plan, and provide strategy and knowledgeable objective oversight of technology partners, vendors, and projects at the Oregon Manufacturing Innovation Center Research & Development (“OMIC R&D”), hosted by Oregon Tech.

About OMIC R&D

OMIC R&D is a world-class collaborative environment that provides economic, strategic, and technological solutions for its industry partners, bringing together the best talents and capabilities of leading manufacturing companies and three universities: Oregon Tech, Oregon State University, and Portland State University. Oregon Tech acts as the host of OMIC R&D. OMIC R&D is instrumental in bolstering economic growth, deepening relationships with metals-related industry, and providing a path for manufacturers to be more competitive in the global market.

The partnerships established through OMIC R&D provides applied research, technical advice, and support driven by manufacturing enterprises of all sizes to define the research and development focus. OMIC R&D is a developing and dynamic workspace where change is the norm.

The OMIC R&D Campus is a ten (10)-acre site located at 33701 Charles T Parker Way, in Scappoose, Oregon, with two (2) research facilities; the OMIC R&D Subtractive Innovation Center, which is 35,000 square feet, and a new Additive Innovation Center, which is 30,000 square feet. In addition, there are four (4) small outbuildings which consist of a compressor building, chemical storage, hazardous materials storage, and a former pump house that now serves as property maintenance storage. The campus is surrounded by chain link fence with angled barbed wire running along its top. An access card activated access gate will be installed before the end of July 2023 and the facility has card access to entry and internal doors of both research buildings.

Fractional CIO and Technology Advisor Services

Oregon Tech needs assistance in the development of a strategic IT/AV development plan, and strategy and knowledgeable objective oversight of technology partners/vendors and projects. This need does not rise to the level of a full-time technology executive. Therefore, Oregon Tech is interested in contracting for fractional chief information officer (“Fractional CIO”) services. Selected quoter will participate in OMIC R&D leadership team meetings, and be responsible for evaluating current system pain points, developing, and overseeing the development of a consistent, integrated technology strategy, including decision pathways that allow for thoughtful, timely decisions and appropriately swift implementation as well as long term planning and steps necessary to carry out that plan and who should be carrying out those plans.

Fractional CIO services provided by the successful quoter are expected to be from IT professional or professionals with experience and a proven track record in managing internal IT staff, external vendors and various types of projects and system implementations. The successful quoter will work on a monthly part time retainer basis vs a full-time employee and will directly report to the Executive Director of OMIC R&D.

The successful quoter will be responsible for carrying out the following initiatives:

- **IT Strategy Development and Execution:**

The successful quoter will collaborate with the leadership team to develop and implement an IT strategy that aligns with the objectives; and provide guidance on emerging technologies and industry best practices to drive innovation and efficiency.

- **IT Infrastructure Management:**

The successful quoter will assess the current IT infrastructure at OMIC R&D and make recommendations for enhancements or updates. The successful quoter will also oversee the implementation and maintenance of IT systems, networks, and hardware, and recommend and oversee IT system development to ensure the security, reliability, and scalability of the IT infrastructure at OMIC R&D.

- **Information Security and Risk Management:**

The successful quoter will develop and implement information security policies, procedures, and practices in conjunction with subject matter experts and conduct regular risk assessments and audits to identify vulnerabilities and recommend mitigation strategies. To do this, it is expected that the successful quote will stay updated on the latest cybersecurity threats and trends to proactively protect company data.

- IT Team Leadership and Collaboration:

The successful quoter will provide leadership and guidance to any internal IT team, fostering a culture of excellence, collaboration, and innovation as well as collaborate with external vendors, contractors, and stakeholders to ensure seamless integration of IT solutions.

- Evaluation of system needs to meet federal standards

The successful quoter will assist OMIC R&D to assess what system improvements, protections and protocols need to be implemented to enable OMIC R&D to meet military standards for data and IT system security.

- System Evaluation of OMIC R&D's AV systems

The successful quoter will interview OMIC R&D staff to assess current and future AV system (conference room projectors cameras, microphones, quality audio and video capture capability, dependable, seamless and high quality in person, virtual, and hybrid conference capabilities). Evaluate existing AV systems' capabilities and challenges against identified current and future needs. Contract Fractional CIO will work with OMIC R&D leadership team and key staff to develop a deliverable plan of action that will result in a reliable AV system that meets OMIC R&D's immediate needs and providing a scalable platform that can be seamlessly expanded and extended to meet OMIC R&D's future needs.

Quotes submitted should convey information sufficient to demonstrate the following capabilities of the quoter:

- Must have or include a team member that can demonstrate 10 years of proven experience as CIO or in a senior IT leadership role.
- Must demonstrate expertise in IT strategy development, infrastructure management, and information security
- Must demonstrate knowledge of best practices and emerging technologies relevant to OMIC R&D
- Must demonstrate ability to work with OMIC R&D team members with a diverse range of IT and AV knowledge and be able to interact with those team members to identify a blend of the right technology with the goals and objectives of the organization
- Must demonstrate ability to analyze and resolve complex issues, both logical and interpersonal, and conduct and communicate cost-benefit and return-on-investment analyses
- Must demonstrate experience to work with and manage multiple outside Managed Service Providers, Software Providers and Vendors
- Must demonstrate Strong leadership, communication, and collaboration skills

Contract Start Date

Delivery time is of the essence and may be a factor in making an award. The desired contract start date is on or around September 1, 2023.

3. QUOTE

Quotes should be short and concise with the following information:

- A. Company experience in these types of projects;
- B. Experience of staff who will work on the project;
- C. Total not-to-exceed price to complete the project, including a breakdown of the not-to-exceed fee and the not-to-exceed reimbursable expenses;
- D. References;
- E. Estimated time to complete the project; and
- F. Any additional information that Oregon Tech should take into consideration for the project or qualifications.

4. EVALUATION

Quotes will be evaluated based on subjective factors, including but not limited to the following: company experience, staff experience, not-to-exceed price for the inventory, references, and proposal to complete the inventory (including timeline).

**OREGON INSTITUTE OF TECHNOLOGY
CERTIFICATION
RFQ #2023-20**

Each quoter responding to this Request for Quotes (“RFQ”) must read, complete, and submit a copy of this Oregon Institute of Technology Certification (“Certification”) with their quote. Failure to do so may result in rejection of quote. By signature on this Certification, the undersigned certifies that they are authorized to act on behalf of the quoter and that under penalty of perjury, the undersigned will comply with the following:

SECTION I. OREGON TAX LAWS

As required in ORS 305.385(6) the undersigned hereby certifies that to the best of the undersigned’s knowledge, the entity is not in violation of any Oregon Tax Laws. For purposes of this Certification, “Oregon Tax Laws” means a state tax imposed by the Oregon Revised Statutes (ORS) 401.792 to 401.816 and ORS Chapters 118, 314, 316, 317, 318, 320, 321, and 323; the elderly rental assistance program under ORS 310.630 to 310.706; and local taxes administered by the Department of Revenue under ORS 305.620. If a contract is executed, this information will be reported to the Internal Revenue Service (IRS). Information not matching IRS records could subject entity to backup withholding.

SECTION II. AFFIRMATIVE ACTION

The undersigned hereby certifies that they have not discriminated against Minority, Women, or Emerging Small Business Enterprises in obtaining any required subcontracts, pursuant to Oregon Tech Policy 580-061-0030(3).

SECTION III. COMPLIANCE WITH SOLICITATION

The undersigned further agrees and certifies that they:

1. Have read, understand, and agree to be bound by and comply with all requirements, instructions, specifications, terms, and conditions of the RFQ (including any and all attachments);
2. Are an authorized representative of the quoter;
3. That the information provided is true and accurate, and that providing incorrect or incomplete information may be cause for rejection of the quote or contract termination; and
4. Will furnish the designated item(s) and/or service(s) in accordance with the RFQ and quote.

Company Name: _____ Date: _____

Signature: _____ Title: _____

Name: _____ Telephone: _____

Email: _____ OR CCB #(if applicable): _____

Business Designation (check one):

☐ Corporation ☐ Partnership ☐ Sole Proprietorship ☐ Non-Profit ☐ Limited Liability Company

Oregon Certified Minority, Women, or Emerging Small Business: (Mark if applicable and provide certification #)

☐ Minority: _____ ☐ Women: _____ ☐ ESB: _____

Self-Reported Minority, Women, or Emerging Small Business: (Mark if applicable)

☐ Minority: _____ ☐ Women: _____ ☐ ESB: _____

OREGON INSTITUTE OF TECHNOLOGY INSTRUCTIONS TO QUOTERS

Quotes are subject to the applicable provisions and requirements of the Oregon Tech Policy and Oregon Revised Statutes.

QUOTE PREPARATION

1. **QUOTE FORMAT:** Quotes must be submitted as indicated in the RFQ.
2. **CONFORMANCE TO RFQ REQUIREMENTS:** Quotes must conform to the requirements of the RFQ. Unless otherwise specified, all items quoted are to be new, unused, and not remanufactured in any way. Any requested attachments must be submitted with the quote and in the required format. Quote prices must be for the unit indicated on the quote. Failure to comply with all requirements may result in quote rejection.
3. **ADDENDA:** Only documents issued as addenda by Oregon Tech serve to change the RFQ in any way. No other directions received by the quoter, written or verbal, serve to change the RFQ document. NOTE: IF YOU HAVE RECEIVED A COPY OF THE RFQ, YOU SHOULD CONSULT THE OREGON PUBLIC UNIVERSITIES BUSINESS AND BID OPPORTUNITIES WEBSITE (<https://www2.wou.edu/nora/orpu.bid.home>) TO ENSURE THAT YOU HAVE NOT MISSED ANY ADDENDA OR ANNOUNCEMENTS. QUOTERS ARE NOT REQUIRED TO RETURN ADDENDUMS WITH THEIR QUOTE. HOWEVER, QUOTERS ARE RESPONSIBLE TO MAKE THEMSELVES AWARE OF, OBTAIN, AND INCORPORATE ANY CHANGES MADE IN ANY ADDENDUMS ISSUED, AND TO INCORPORATE ANY CHANGES MADE BY ADDENDUM INTO THEIR FINAL QUOTE. FAILURE TO DO SO MAY, IN EFFECT, MAKE THE QUOTER'S QUOTE NON-RESPONSIVE, WHICH MAY CAUSE THE QUOTE TO BE REJECTED.
4. **USE of BRAND or TRADE NAMES:** Any brand or trade names used by Oregon Tech in the specifications are for the purpose of describing and establishing the standard of quality, performance, and characteristics desired, and are not intended to limit or restrict competition. Quoters may submit quotes for substantially equivalent products to those designated unless the RFQ provides that a specific brand is necessary because of compatibility or other requirements. All such brand substitutions shall be subject to approval by Oregon Tech.
5. **PRODUCT IDENTIFICATION:** Quoters must clearly identify all products quoted. Brand name and model or number must be shown. Oregon Tech reserves the right to reject any quote when the product information submitted with the quote is incomplete.
6. **F.O.B. DESTINATION:** Unless specifically allowed in the RFQ, ***QUOTE PRICE MUST BE F.O.B. DESTINATION with all transportation and handling charges included in the quote.***
7. **DELIVERY:** Delivery time must be shown in number of calendar days after receipt of purchase order.
8. **EXCEPTIONS:** Any deviation from quote specifications, or the Oregon Institute of Technology Goods and Services Contract, attached and incorporated herein as **Exhibit A**, may result in quote rejection.
9. **SIGNATURE ON QUOTE:** Quotes must be signed by an authorized representative of the quoter. Signature on a quote certifies that the quote is made without connection with any person, firm or corporation making a quote for the same goods and/or services and is in all respects fair and without collusion or fraud. Signature on a quote also certifies that the quoter has read, fully understands, and agrees to be fully bound by and comply with all quote specifications, and the Oregon Institute of Technology Goods and Services Contract, attached as **Exhibit A**, (including

insurance requirements). No consideration will be given to any claim resulting from quoting without comprehending all requirements of the RFQ.

- 10. QUOTE MODIFICATION:** Quotes, once submitted, may be modified in writing before the time and date set for quote closing. Any modifications should be signed by an authorized representative, and state that the new document supersedes or modifies the prior quote. Quoters may not modify quotes after quote closing time.
- 11. QUOTE WITHDRAWALS:** Quotes may be withdrawn by request in writing signed by an authorized representative and received by Oregon Tech prior to quote closing time. Quotes may also be withdrawn in person before quote closing time upon presentation of appropriate identification.
- 12. QUOTE SUBMISSION:** Quotes must be submitted to Oregon Tech Purchasing and Contract Services Office in the location designated in the introduction of the RFQ via the method indicated. No oral, fax, or telephone quotes will be accepted. Envelopes or e-mails containing Quotes should contain the RFQ number and RFQ title. Electronic quotes may not exceed 25 MB in file size. This limit cannot be increased, and files of larger size will not be accepted.

QUOTE EVALUATION AND AWARD

- 1. PRIOR ACCEPTANCE OF DEFECTIVE PROPOSALS:** Due to limited resources, Oregon Tech generally will not completely review or analyze quotes, which fail to comply with the requirements of the RFQ or which clearly are not the best quotes, nor will Oregon Tech generally investigate the references or qualifications of those who submit such quotes. Therefore, neither the return of a quote, nor acknowledgment that the selection is complete shall operate as a representation by Oregon Tech that an unsuccessful quote was complete, sufficient, or lawful in any respect.
- 2. DELIVERY:** Significant delays in delivery may be considered in determining award if early delivery is required.
- 3. CASH DISCOUNTS:** Cash discounts will not be considered for award purposes unless stated in the RFQ.
- 4. PAYMENT:** Quotes which require payment in less than thirty (30) days after receipt of invoice or delivery of goods, whichever is later, may be rejected.
- 5. INVESTIGATION OF REFERENCES:** Oregon Tech reserves the right to investigate references and or the past performance of any quoter with respect to its successful performance of similar services, compliance with specifications and contractual obligations, and its lawful payment of suppliers, sub-contractors, and workers. Oregon Tech may postpone the award or execution of the contract after the announcement of the apparent successful quoter in order to complete its investigation. Oregon Tech reserves the right to reject any quote or to reject all quotes at any time prior to Oregon Tech's execution of a contract if it is determined to be in the best interest of Oregon Tech to do so.
- 6. METHOD OF AWARD:** Oregon Tech reserves the right to make the award by item, groups of items, or entire quote, whichever is in the best interest of Oregon Tech.
- 7. QUOTE REJECTION:** Oregon Tech reserves the right to reject any and all quotes.
- 8. QUOTE RESULTS:** Quoters who submit a quote will be notified of the RFQ results. Awarded quote files are public records and available for review by appointment.

Exhibit A

Oregon Institute of Technology Goods and Services Contract

[Please see attached.]