



REQUEST FOR PROPOSALS

RFP #2025-01

SHARED SERVICES

ISSUE DATE: February 14, 2025

CLOSING DATE: March 7, 2025

CLOSING TIME: 1:00 PM Pacific Time

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**OREGON INSTITUTE OF TECHNOLOGY
REQUEST FOR PROPOSALS**

**RFP #2025-01
SHARED SERVICES**

SECTION I - INFORMATION REGARDING PROPOSAL

INTRODUCTION

The state of Oregon has seven (7) publicly funded universities (“OPUs”). The missions of the universities vary as do their degree programs, demographics and logistics within the state. In recent years, five (5) of the universities, Portland State University (“PSU”), Eastern Oregon University (“EOU”), Western Oregon University (“WOU”), Southern Oregon University (“SOU”), and Oregon Institute of Technology (“Oregon Tech”) have been experiencing challenges in financial sustainability triggered primarily by a combination of declining enrollment and the corresponding drop in tuition revenue compounded by escalating organized labor salaries, retirement and healthcare benefits costs.

This group of five (5) universities is referred to collectively herein as the Technical and Regional Universities plus PSU (“TRUs+PSU” or the “five (5) universities”). While they share many of the same factors affecting their fiscal sustainability, additional reasons may also be relative to their degree offerings, student profiles, missions, and campus locations.

Oregon’s [Higher Education Coordinating Commission](#) (“HECC”) is committed to the viability of the state’s public universities, while working to improve equitable access to and success in higher education and workforce training for Oregonians statewide.

Accordingly, in this Request for Proposals (“RFP”), Oregon Tech is seeking proposals on behalf of the TRUs+PSU to identify and select an experienced higher education consulting firm to perform an in-depth analysis and assessment of selected services, systems and competencies among the five (5) universities and to identify opportunities for collaboration in reducing costs, improving efficiencies, promoting standardization and/or achieving economies of scale in integral service units while also improving overall service quality, reliability and customer focused service.

IMPORTANT NOTICE

It will be the responsibility of potential proposers to refer daily to the Public University Procurement Website (<https://www2.wou.edu/nora/orpu.bid.home>) to check for any available addenda, response to clarifying questions, cancellations or other information pertaining to this RFP.

GENERAL INFORMATION

Issuing Office: The Department of Finance and Administration at Oregon Tech is the Issuing Office and is the sole point of contact for clarifications regarding technical specifications in this RFP. The Oregon Tech Procurement and Contract Services Office is the sole point of contact regarding the RFP process. All correspondence pertaining to these two matters should be appropriately addressed to the contact persons below:

Content and Technical Specifications:

John Harman, Vice President Finance and Administration

Telephone: (541) 885-1106
Email: John.Harman@oit.edu

RFP Process Questions:

Vivian Chen, Director of Procurement, Contracts, and Risk
Telephone: (503) 821-1266
Email: Vivian.Chen@oit.edu

SCHEDULE OF EVENTS

The timing and sequence of events resulting from this RFP will be ultimately determined by Oregon Tech. The following schedule is illustrative of optimal timing goals:

RFP Issue Date.....	February 14, 2025
Deadline for Protest of Specifications	February 20, 2025 (5:00 PM PT)
All Clarifying Questions Due	February 21, 2025 (5:00 PM PT)
Notice of Interest Deadline	February 24, 2025 (5:00 PM PT)
Closing Date (Proposals Due).....	March 7, 2025 (1:00 PM PT)
Finalist Presentations (if required)	Week of March 17, 2025
Deadline for Protest of Award	Seven (7) calendar days after the date on Notice of Award
Anticipated Contract Begin Date	On or around April 1, 2025

GENERAL PROVISIONS

Oregon Tech reserves the right to reject any and all proposals received as a result of this RFP. Oregon Tech Policy Chapters 580-61 and 580-62 govern this procurement process.

1. Modification or Withdrawal of Proposal. Any proposal may be modified or withdrawn at any time prior to the closing deadline, provided that a written request is received by the Oregon Tech Procurement and Contract Services Office prior to the Closing Date. The withdrawal of a proposal will not prejudice the right of a Proposer to submit a new proposal.

2. Notice of Interest. The Notice of Interest (form attached below) should be submitted to the Oregon Tech Procurement and Contract Services Office by 5:00 PM PT, on the date indicated in the Schedule of Events, via email. In the Notice of Interest, the Proposer must provide the name of the primary contact person, plus that person’s current telephone number and email address for communication of information about the RFP. Proposers that complete and return the Notice of Interest will receive the same supplementary information. Submission of the Notice of Interest is not a mandatory requirement for Proposers to submit a proposal.

3. Requests for Clarification and Requests for Change: Proposers may submit questions regarding the specifications of the RFP. Questions must be received in writing on or before 5:00 PM PT, on the date

indicated in the Schedule of Events, at the Oregon Tech Procurement and Contract Services email address as listed in the Contact Information section of the RFP. Requests for changes must include the reason for the change and any proposed changes to the requirements.

The purpose of this requirement is to permit Oregon Tech to correct, prior to the opening of proposals, RFP terms or technical requirements that may be unlawful, improvident, or which unjustifiably restrict competition.

Oregon Tech will consider all requested changes and, if appropriate, amend the RFP. Oregon Tech will provide reasonable notice of its decision to all Proposers that submit a Notice of Interest and on the Public University Procurement Website (<https://www2.wou.edu/nora/orpu.bid.home>).

No oral or written instructions or information concerning this RFP from Oregon Tech managers, employees or agents to prospective Proposers shall bind Oregon Tech unless included in an Addendum to the RFP.

4. Protests of the RFP/Specifications: Protests must be in accordance with Oregon Tech Policy Section 580-061-0145. Protests of Specifications must be received in writing on or before 5:00 PM PT on the date indicated in the Schedule of Events, or within seven (7) business days of issuance of any addendum, at the Oregon Tech Procurement and Contract Services email address as listed in the Contact Information section of the RFP. Protests may not be faxed. Protests of the RFP specifications must include the reason for the protest and any proposed changes to the requirements.

5. Addenda: If any part of this RFP is amended, an addendum will be provided on the Public University Procurement Website (<https://www2.wou.edu/nora/orpu.bid.home>), with a copy to all parties who submit the Notice of Interest.

6. Post-Selection Review and Protest of Award: Oregon Tech will name the apparent successful Proposer in a “Notice of Intent to Award” letter. Identification of the apparent successful Proposer is procedural only and creates no right in the named Proposer to award of the contract. Competing Proposers will be notified in writing of the selection of the apparent successful Proposer(s) and shall be given seven (7) calendar days from the date on the “Notice of Intent to Award” letter to review the file and evaluation report at the Oregon Tech Procurement and Contract Services Office and file a written protest of award, pursuant to Oregon Tech Policy Section 580-061-0145. Any award protest must be in writing and must be delivered by email to the address of the Oregon Tech Procurement and Contract Services Office as listed in the Contact Information section of the RFP.

Oregon Tech will consider any protests received and:

- (A) reject all protests and proceed with final evaluation of, and any allowed contract language negotiation with, the apparent successful Proposer and, pending the satisfactory outcome of this final evaluation and negotiation, enter into a contract with the named Proposer; OR
- (B) sustain a meritorious protest(s) and reject the apparent successful Proposer as nonresponsive, if such Proposer is unable to demonstrate that its proposal complied with all material requirements of the solicitation and Oregon public procurement law; thereafter, Oregon Tech may name a new apparent successful Proposer; OR
- (C) reject all proposals and cancel the procurement.

The Oregon Tech Vice President for Finance and Administration or designee will timely respond to the

protest after receipt. This decision shall be final.

7. Acceptance of Contractual Requirements: Failure of the selected Proposer to execute a contract and deliver required insurance certificates within ten (10) calendar days after notification of an award may result in cancellation of the award. This time period may be extended at the sole discretion of Oregon Tech.

8. Public Records: Proposals are deemed confidential until the “Notice of Intent to Award” letter is issued. This RFP and one copy of each proposal received in response to it, together with copies of all documents pertaining to the award of a contract, will be kept and made a part of a file or record which will be open to public inspection. If a proposal contains any information that is considered a **TRADE SECRET UNDER ORS 192.501(2), SUCH INFORMATION MUST BE LISTED ON A SEPARATE SHEET CAPABLE OF SEPARATION FROM THE REMAINING PROPOSAL AND MUST BE CLEARLY MARKED WITH THE FOLLOWING LEGEND:**

“This information constitutes a trade secret under ORS 192.501(2) and shall not be disclosed except in accordance with the Oregon Public Records Law, ORS Chapter 192.”

The Oregon Public Records Law exempts from disclosure only bona fide trade secrets, and the exemption from disclosure applies only “unless the public interest requires disclosure in the particular instance.” ORS 192.500(1). Therefore, non-disclosure of documents or any portion of a document submitted as part of a proposal may depend upon official or judicial determinations made pursuant to the Public Records Law.

9. Investigation of References: Oregon Tech reserves the right to investigate all references in addition to those supplied references and investigate the past performance of any Proposer with respect to its successful performance of similar services, its compliance with specifications and contractual obligations, its completion or delivery of a project on schedule, its lawful payment of subcontractors and workers and any other factor relevant to this RFP. Oregon Tech may postpone the award or the execution of the contract after the announcement of the apparent successful Proposer in order to complete its investigation.

10. RFP Proposal Preparation Costs and Other Costs: Proposer costs of developing the proposal, cost of attendance at an interview (if requested by Oregon Tech) or any other costs are entirely the responsibility of the Proposer, and will not be reimbursed in any manner by Oregon Tech.

11. Clarification and Clarity: Oregon Tech reserves the right to seek clarification of each proposal, or to make an award without further discussion of proposals received. Therefore, it is important that each proposal be submitted initially in the most complete, clear, and favorable manner possible.

12. Right to Reject Proposals: Oregon Tech reserves the right to reject any or all proposals if such rejection would be in the public interest, as determined by Oregon Tech.

13. Cancellation: Oregon Tech reserves the right to cancel or postpone this RFP at any time or to award no contract.

14. Proposal Terms: All proposals, including any price quotations, will be valid and firm through a period of sixty (60) calendar days following the Closing Date. Oregon Tech may require an extension of this firm offer period. Proposers will be required to agree to the longer time frame in order to be further considered in the procurement process.

15. Oral Presentations: At Oregon Tech’s sole option, Proposers may be required to give an oral presentation of their proposal to Oregon Tech, a process which would provide an opportunity for the Proposer to clarify or elaborate on the proposal but will in no material way change Proposer’s original proposal. If the evaluating committee requests presentations, the Oregon Tech Issuing Office will schedule the time and location for said presentation. Any costs of participating in such presentations will be borne solely by Proposer and will not be reimbursed by Oregon Tech. **Note:** Oral presentations are at the discretion of the evaluating committee and may not be conducted; therefore, **written proposals should be complete.**

16. Usage: It is the intention of Oregon Tech to utilize the services of the successful Proposer(s) to provide services as outlined in the Scope of Work below.

17. Sample Contract: Submission of a proposal in response to this RFP indicates Proposer’s willingness to enter a contract containing substantially the same terms listed in Exhibit A – Oregon Tech Sample Contract, attached hereto and made a part hereof (“Sample Contract”). No action or response to the Sample Contract is required under this RFP. Any objections to the Sample Contract terms should be raised in accordance with Paragraphs 3 and 4 of the “General Provisions” of this RFP, pertaining to requests for clarification or change or protest of the RFP/specifications, and as otherwise provided for in this RFP.

18. Review for Responsiveness: Upon receipt of all proposals, the Issuing Office or designee will determine the responsiveness of all proposals before submitting them to the evaluation committee. If a proposal is incomplete or non-responsive in significant part or in whole, it will be rejected and will not be submitted to the evaluation committee. Oregon Tech reserves the right to determine if an inadvertent error is solely clerical or is a minor informality which may be waived, and then to determine if an error is grounds for disqualifying a proposal. The Proposer’s contact person identified on the proposal will be notified, identifying the reason(s) the proposal is non-responsive.

19. Rejections and Withdrawals. Oregon Tech reserves the right to reject any or all proposals or to withdraw any item from the award.

20. RFP Incorporated into Contract. This RFP will become part of the Contract between Oregon Tech and the selected contractor(s). The contractor(s) will be bound to perform according to the terms of this RFP, their proposal(s), and the terms of Exhibit A.

21. Communication Blackout Period. Except as called for in this RFP, Proposers may not communicate with members of the Evaluation Committee about the RFP until the apparent successful Proposer is selected, and all protests, if any, have been resolved.

22. Prohibition on Commissions. Oregon Tech will contract directly with persons or entities capable of performing the requirements of this RFP. Contractors must be represented directly. Participation by brokers or commissioned agents will not be allowed during the proposal process.

23. Ownership of Proposals. All proposals in response to this RFP are the sole property of Oregon Tech, and subject to the provisions of Oregon Revised Statutes, Chapter 192 (Oregon Public Records Law).

24. Clerical Errors in Awards. Oregon Tech reserves the right to correct inaccurate awards resulting from its clerical errors.

25. Rejection of Qualified Proposals. Proposals may be rejected in whole or in part if they attempt to

limit or modify any of the terms, conditions or specifications of the RFP or the Oregon Tech Sample Contract.

26. Collusion. By responding, the Proposer states that the proposal is not made in connection with any competing Proposer submitting a separate response to the RFP and is in all aspects fair and without collusion or fraud. Proposer also certifies that no officer, agent, or employee of Oregon Tech has a pecuniary interest in this proposal.

27. Evaluation Committee: Proposals will be evaluated by a committee consisting of representatives from the TRUs+PSU. Oregon Tech reserves the right to modify the Evaluation Committee make-up in its sole discretion. The committee's recommendations will be forwarded to the Oregon Tech Vice President for Finance and Administration, or designee, for final approval.

28. Commencement of Work: The Proposer shall commence no work until all insurance requirements have been met, the Protest of Awards deadline has been passed, any protest have been decided, a contract has been fully executed, and a Notice to Proceed has been issued by Oregon Tech.

29. 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. Proposers may submit proposals for substantially equivalent products to those designated unless this RFP 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.

30. Best and Final Offer: Oregon Tech may request best and final offers from those Proposers determined by Oregon Tech to be reasonably viable for contract award. However, Oregon Tech reserves the right to award a contract on the basis of the initial proposal received. Therefore, each proposal should contain the Proposer's best terms from a price and technical standpoint. Following evaluation of the best and final offers, Oregon Tech may select for final contract negotiations/execution the offers that are most advantageous to Oregon Tech, considering cost and the evaluation criteria in this RFP.

TERM OF CONTRACT

The Contract is expected to begin on or about April 1, 2025, and extend to July 31, 2025. Depending on the findings and results under the initial Contract, Oregon Tech may request an option to extend the Contract with an expanded scope. Oregon Tech intends to reserve the right upon thirty (30) days' notice to the Contractor to terminate the Contract for its convenience.

DELIVERY OF PROPOSALS

The complete proposal (including all attachments) must be emailed and must be electronically received by **1:00 PM PT, March 7, 2025**. **Email subject line must be "Response to RFP #2025-01."** Proposer are encouraged to telephone and confirm electronic receipt of the complete emailed document(s) with the Oregon Tech Procurement and Contract Services Office before the above time and date deadline. Proposals delayed or lost by email system filtering or failures may be considered at Oregon Tech's sole discretion.

It is the responsibility of the Proposer to ensure that proposals arrive by the closing date and time. **NO LATE PROPOSALS WILL BE ACCEPTED.** Proposals may not be submitted by telephone or fax. Proposals must be e-mailed to:

Email: Purchasing@oit.edu

Proposals will be publicly opened by a designee in the Oregon Tech Procurement and Contract Services Office on the Closing Date.

PROJECT BACKGROUND

The eighty-second (82nd) Oregon Legislature (“Legislature”) recognized that the TRUs+PSU are facing significant and persistent challenges in maintaining financial sustainability. In response, the Legislature designated limited funding to be administered by the HECC and to be used by the five (5) universities to assertively identify and implement specific initiatives that would improve their financial sustainability. HECC defined the following three (3) categories as acceptable for projects:

1. Strategic cost-cutting, such as through early retirement incentives, paying up-front expenses for administrative efficiencies, or retiring debt.
2. Growing revenue, such as through equipment purchases that allow the expansion of high-demand programs.
3. Collaborative activities, such as through the up-front costs associated with the development of shared academic, administrative, or student support services.

The TRUs+PSU have received approval from HECC to move forward with this solicitation, which most directly ties to the third category listed above, but portions of the initiative may also address administrative efficiencies referenced in the first category. The purpose of this RFP initiative is to identify and select an experienced higher education consulting firm to perform an in-depth analysis and assessment of selected services, systems, and competencies among the five (5) universities and to identify opportunities for collaboration in reducing costs, improving efficiencies, promoting standardization and/or achieving economies of scale in integral service units while also improving overall service quality, reliability and customer focused service.

Oregon Tech will serve as the lead entity for this RFP process. The resulting contract, if awarded, will be entered into solely by and between the selected Proposer and Oregon Tech. Any and all payments for services rendered under the resulting contract will be processed directly by Oregon Tech. The selected Proposer acknowledges and agrees that Oregon Tech will be responsible for the payment of invoices and any other financial matters related to the contract, including, but not limited to, the processing and disbursement of payments for work performed under the contract. The selected Proposer agrees not to seek or accept any payments or financial settlements from any third party regarding the services provided under the resulting contract, except as expressly authorized in writing by Oregon Tech.

Partner Universities Profile (TRUs+PSU)

A brief profile of the five (5) universities sponsoring this RFP follows.

Portland State University (“PSU”) was founded in 1946 and began as a post-secondary educational institution created to support World War II veterans transitioning to civilian life. Over the next two decades, it expanded its programs and facilities, becoming a four-year college before being granted university status in 1969. Today, PSU is recognized for its innovative approach to higher education and commitment to serving a diverse student body. As of fall 2024, PSU enrolled approximately 20,470 students, making it Oregon's third-largest public university. PSU is situated in southwest downtown Portland, Oregon.

PSU offers a comprehensive range of academic programs, including more than 200 majors, minors, certificates, and concentrations, ensuring students have opportunities to tailor their education to meet their personal and professional goals. With an operating budget of \$356.6 million for the 2024–25 fiscal year, the university invests significantly in academic excellence, student services, and campus infrastructure. This financial support enables PSU to maintain its mission of providing accessible, high-quality education while fostering innovation and community engagement.

Sources:

https://en.wikipedia.org/wiki/Portland_State_University

<https://pdx.edu>

https://psu_budget.abalancingact.com

Southern Oregon University (“SOU”), originally founded in 1872 as the Ashland Academy, has a long history of serving the educational needs of southern Oregon. The university has been operating from its main campus in Ashland since 1926, evolving over the decades to become a dynamic institution focused on innovation, sustainability and community engagement. SOU’s scenic campus in the Rogue Valley provides an ideal setting for academic exploration and personal growth. In addition to its main campus in Ashland, SOU also has a location in Medford, Oregon.

As of Fall 2024, SOU enrolled 5,129 students, offering them access to about 90 bachelor's, graduate, and certificate programs. These diverse academic offerings are designed to prepare students for success in their chosen fields while emphasizing practical learning and interdisciplinary approaches. With an operating budget of approximately \$67.5 million for the 2024-25 fiscal year, SOU continues to invest in high-quality education, sustainable practices, and robust student services, solidifying its role as a vital part of Oregon’s higher education system.

Sources:

<https://en.wikipedia.org/w/index.php?search=southern+oregon+university&title=Special%3ASearch&ns0=1>

<https://www.oregon.gov/highered/strategy-research/Documents/Reports/2023-University-Evaluation-SOU-ORS%20352.061.pdf>

https://governance.sou.edu/wp-content/uploads/sites/63/2024/07/062024-Meeting-Materials_FAC_v2.pdf

Eastern Oregon University (“EOU”), located in La Grande, Oregon, was founded in 1929 as a teacher’s college, dedicated to preparing educators for service in rural and remote communities. Over time, EOU expanded its mission and offerings, becoming a comprehensive regional university that provides diverse educational opportunities to students across the state and beyond. Its rural location and close-knit campus community foster a supportive environment for academic and personal development. EOU’s main campus is situated in La Grande, with regional locations in Bend, Burns, Enterprise, Hermiston, John Day, Ontario, Pendleton, Roseburg, and Salem.

As of Fall 2024, EOU enrolled 2,894 students who benefit from access to more than 30 academic programs offered through its four colleges. These programs span disciplines such as sciences, humanities, education, and business, providing students with a robust selection of pathways to pursue their passions and career goals. With a 2024-25 fiscal year operating budget of \$54.2 million, EOU focuses its resources on delivering quality education, innovative research, and meaningful community engagement. Its commitment to academic excellence and regional impact makes it a vital institution in Oregon’s higher education system.

Sources:

https://en.wikipedia.org/wiki/Eastern_Oregon_University

https://www.eou.edu/institutional-effectiveness/files/2024/11/EOU_Quick_Facts_Fall-2024.pdf
https://docs.google.com/document/d/1FDXPGkG_dGvMIC74kS0N9nTM06tTF3dJ/edit#heading=h.gjdgxs

Western Oregon University (“WOU”), located in Monmouth, Oregon, has a rich history as one of the state’s oldest institutions of higher learning. Originally established in 1856 as Monmouth University, it has evolved over the decades to become a comprehensive university offering a broad array of academic programs. WOU has maintained its commitment to providing accessible, high-quality education and fostering a supportive environment for its students. WOU offers locations in Monmouth and Salem, Oregon.

WOU’s Fiscal Year 2024-25 E&G operating budget is \$76.6M. As of Fall 2024, WOU had an enrollment of approximately 3,823 students and offers over 55 major academic options across a variety of disciplines. These programs are designed to prepare students for success in a diverse and dynamic world while emphasizing hands-on learning and community engagement. With a focus on academic excellence and inclusivity, WOU continues to play a significant role in Oregon’s higher education landscape, providing opportunities for students to achieve their personal and professional goals.

Sources:

https://en.wikipedia.org/wiki/Western_Oregon_University
<https://wou.edu/institutionalresearch/enrollment/>
<https://wou.edu/advising/major-and-minor-options/#:~:text=WOU%20offers%20over%2055%20different%20Major%20options>

Oregon Institute of Technology (“Oregon Tech”) is Oregon’s Polytechnic University with its main campus located in Klamath Falls, Oregon. Founded in 1947, Oregon Tech was initially established to train and re-educate World War II veterans. Over the decades, it has grown significantly in both size and academic scope, becoming a leader in providing high-quality, hands-on education in technical and applied fields. Oregon Tech’s mission has evolved to include not only serving veterans but also offering a wide array of degree programs to a diverse student population.

The university is dedicated to providing practical skills and knowledge, preparing students for successful careers in rapidly changing industries. In addition to the Klamath Falls main campus, Oregon Tech also has satellite campuses in Portland, Salem and Seattle, as well as Oregon’s Manufacturing and Innovation Center (OMIC) in Scappoose, Oregon.

With a Fall 2024 student enrollment of nearly 5,302, including advanced college placement (ACP), Oregon Tech offers 47 major and undergraduate, graduate and doctoral degree programs across a variety of disciplines. As a polytechnic university, Oregon Tech specializes in engineering, technology, healthcare and health technologies, business, communication and applied sciences such as psychology and environmental science, physical therapy and applied sciences. These programs are designed to equip students with the skills necessary to excel in the workforce, build economic mobility and contribute to innovation in their chosen fields. Oregon Tech continues to maintain a strong focus on applied research, sustainability, and community service, positioning the university as an integral partner in Oregon’s higher education landscape.

Sources:

<https://oit.edu>
https://en.wikipedia.org/wiki/Oregon_Institute_of_Technology

Background

Following the dissolution of the Oregon University System (“OUS”) in 2016, a shared services entity, University Shared Services Enterprise (“USSE”) was created. Its purpose was to provide continuity for many of the core business and support functions previously provided for the seven public universities through the OUS system. USSE was housed within Oregon State University (“OSU”) as a distinct service department and not configured as a separate Section 501(c)(3) entity under Internal Revenue Service Code. It was anticipated that over time, some of the universities may elect to withdraw from the shared services relationship at OSU and begin performing many of the services within their own universities. As some larger universities began to transition away from purchasing shared services, the cost equation was disrupted and adjustments were necessary to address affordability for the remaining participating universities, but there was some loss in economies of scale and over time the long-term viability of certain services were in doubt. Now that the economic realities for the TRUs+PSU are becoming clearer, there is a renewed interest in exploring the feasibility of a more robust shared services solution.

The five (5) universities may benefit from some form of a collaborative shared services model. These models have been successfully implemented in a number of university systems in recent years to achieve economies of scale in cost structures, consistency and standardization in operating processes, improved depth and flexibility in staffing models and improved leverage in contracting.

Perhaps this could even be achieved through reconfiguring and expanding services through USSE that have been reduced in the past few years to now include primarily labor negotiations and treasury services. Alternatively, creating a new shared services enterprise in a 501(c)(3) or collaborating through a less formal confederation model may offer more flexibility and opportunity for the TRUs+PSU. However, some models may have more risk-sharing or indemnification challenges than others.

The HECC is actively supporting this consultative initiative in partnership with the TRUs+PSU to identify a viable path forward with specific action steps that will boost the financial sustainability of the five (5) universities, while implementing best practices leading to improved cost models, enhanced economies of scale and overall improved efficiencies.

SCOPE OF WORK

Objective

The primary objective of the competitive bid and corresponding consulting initiative is to identify and engage the professional services of a recognized and well-established leader in higher education consulting relative to business/operations models, alignments and structures that when optimized and implemented result in improved efficiencies, better control and lower costs through FTE optimization, technology, process and operational efficiencies and resulting synergies.

The selected Proposer, in collaboration with TRUs+PSU leadership, will lead the five (5) universities through a comprehensive assessment and identification of specific functional service and support areas that will benefit most from a shared services alignment. The assessment will also provide an unbiased and realistic projection of the potential for savings or improved efficiencies over a number of years along with a detailed roadmap action plan and technical support necessary to operationalize and implement the plan to achieve the desired goals.

It is important to recognize that success in exploring and implementing any shared services environment is largely dependent upon the alignment of vision, values and culture among the leadership of the partnering universities and their governing boards along with a commitment to explore the viability and

benefits of an improved business/operations model. The selected Proposer will help build on those alliances and relationships as necessary to advance the initiative.

Specifications and Metrics

The contract is for a comprehensive written operational and financial assessment with specific recommendations regarding service units that would benefit from alignment in a shared services or similar collaborative model to achieve sustained cost efficiencies, improved service unit response and quality as well as long-term viability given evolving technologies and other business innovations. The report will include supporting schedules, analysis, business justification and detailed financial proformas documenting projected improved efficiencies in operations and/or reduction in costs as well as a comprehensive return on investment analysis considering technology, personnel, logistics and defining financial and non-financial benefits as well as key performance metrics or indicators for success

Projected savings and operational costs will be benchmarked to the industry using best practices and to current TRUs+PSU costs for comparative analysis. The report will also contain detailed, specific and chronologically aligned action steps required to implement the recommendations to achieve the desired business model for projected efficiencies and savings along with a realistic timeline and consulting resources for implementation.

The selected Proposer will design how future service line processes will be aligned, who will perform which functions and what resources are required. Process and transactional flowcharts will capture alignments and document the business and operations processes. Compatible ERP/IT systems will be an essential element to success. Service level agreements will evidence responsibility functions. The selected Proposer will create policy and procedure documents, service unit training materials and job descriptions if indicated. Testing before a transition or go-live is integral to overall project success. Implementation and rollout follow the completion of documenting new processes and alignment and operating in the test environment. Planning and sufficient resources are essential for a successful rollout. Data migration may be necessary as part of the new shared services model before it is put into action in real-time.

The new structure must be optimized through continuous improvement and open-loop learning practices will be essential to realizing and sustaining the maximum benefits from the shared services model. There must be carefully prescribed conditions for any universities to exit the new structure because changes in the mix could have a detrimental effect on remaining efficiencies.

The selected Proposer will begin the engagement by building a robust workplan following collaboration with the TRUs+PSU. The selected Proposer will focus first on the service areas where the universities have expressed an affirmative interest in exploring collaborations or shared services. In addition to those specific areas, the selected Proposer will also explore, if time permits, other areas where synergies or opportunities for efficiencies and reduced costs and improved service quality appear to exist.

Primary service areas for assessment and recommendation include but are not limited to:

1. Purchasing and Procurement Services
2. Information Technology Services (Platforms, Technologies & Cybersecurity)
3. Legal Services
4. Compliance and Risk Management
5. Internal Audit
6. Payroll Services (backend)
7. Human Resource Management (Training/Recruitment)

In preparing for the project, the selected Proposer will meet with the project work group and the leadership of each of the five (5) universities to review and refine the scope of the engagement and to learn more about each university's mission and culture to identify any anticipated challenges in completing the engagement. The selected Proposer will conduct in-depth meetings with the TRUs+PSU service unit leaders in areas for focused assessment regarding shared services opportunities.

Based on these initial meetings, interviews, additional documents review, industry expertise and knowledge of best practices, the selected Proposer will develop a comprehensive project work plan including, but not limited to:

- A. Individuals assigned to perform the work along with brief biography highlighting experience
- B. Quality Assurance Plan for the project
- C. Communication plan with senior leadership, project work group and others
- D. Full description of project work to be completed to meet project goals
 - i. Service areas for focused review
 - ii. Ancillary areas for review if time/budget permit
 - iii. Project budget for each phase
- E. Project activity schedule, timeline, milestones for project and completion date
- F. Specific selected Proposer work component breakdown
 - i. Understand university expectations and needs in relation to service lines
 - ii. Evaluate FTEs, technology systems, processes, workflows
 - iii. Identify inefficiencies to be addressed
 - iv. Determine current baseline costs for service units
 - v. Determine metrics for success
 - vi. Propose optimal alignment
 - vii. Determine estimated cost savings or revenue enhancement opportunities
 - viii. Detailed action plan to implement desired components
 - ix. Role of selected Proposer in implementation

SECTION II – INFORMATION REQUIRED FROM PROPOSERS

PROPOSAL FORM AND CONTENT

Proposals that do not contain all the information requested in this and other sections may be rejected as non-responsive.

Submission Format

1. The proposal should be written on standard size (8½” x 11”) paper, using generally accessible word processing and document formats conducive to cut-and-paste transfer of information to contracts or other summary documents. MSOffice Suite and Adobe Acrobat documents are preferred.
2. Proposers should structure responses as outlined in this RFP. Proposals should be prepared so that responses are specifically addressed in the same order as the requested information identified below and on the Questionnaire. Pages should be numbered consecutively.

File Size Limit

Proposer’s submission may not exceed **25 MB** in file size. This limit cannot be increased, and files of larger size will not be accepted.

REQUIRED PROPOSAL CONTENT

1. You must complete the **Bidder/Proposer Non-Discrimination and Oregon Tax Laws Certification** sheet, signed by an authorized company official.
2. The proposal must also include the following:
 - a. **Title Page or Cover Letter.** The title page or cover letter should indicate the date, subject, name of the Proposer, address, current telephone number, e-mail address, name and title of the Proposer’s contact person as well as a signature of an authorized official with the authority to negotiate and contractually bind the Proposer.
 - b. **Questionnaire.** Complete and specific answers to the Questionnaire for Proposers. Please respond by restating each question and thereafter providing your answer in order beginning with question 1.
3. **Summary Statement.** The Proposer may, but is not required to, provide a summary statement as to its qualifications, as well as briefly describe (no more than five hundred (500) words) any special considerations the Oregon Tech should consider.

EVALUATION CRITERIA

Proposals will be evaluated for completeness and compliance with this RFP. Proposals considered complete will be evaluated to determine if they comply with the administrative, contractual, and technical requirements of the RFP. If the proposal is unclear, Proposers may be asked to provide written clarification. **Proposals that do not specifically address the scope of work or do not include the**

complete proposal content may be rejected.

Proposals will be evaluated based on the following criteria and questions outlined in the Questionnaire for Proposers:

1. Background Information	25 points
2. Response to Scope of Work	50 points
3. Depth of experience across business functions	25 points
4. Overall profile of project management and technical specifications	25 points
5. Competitiveness and stability of pricing	50 points
6. Services offered	25 points
7. Interview (if applicable)	<u>50 points</u>
Total Possible:	250 points

SECTION III – QUESTIONNAIRE FOR PROPOSERS

Please submit your responses in order beginning with question 1 by restating the question, then providing your answer. Use additional sheets as necessary. Be specific with names and numbers.

1. Background Information

Please provide a detailed description of relevant experience and expertise in shared services and cost allocation methodologies, specifically within higher education and multi-campus/business organizations. Experience working with Oregon issues is preferred. Firms should provide evidence of the successful completion of at least three (3) successful projects related to improving efficiencies in business and support services across multiple campuses or similar entities and show a track record of fostering continuous improvement and economies of scale within shared services environments. Please provide the name, address, and current telephone numbers of the contact person for such projects.

Please also identify specific person(s) who would be responsible for the proposed work and include a brief resume for each. Please list references for each person identified, including name, address, and current telephone number of an appropriate reference contact person.

2. Scope of Work

Using the Scope of Work as a guide, propose approaches and methodologies for evaluating and enhancing the current operational services and cost allocation strategies and identify a detailed plan for developing key performance indicators, capacity metrics models, and an efficient data collection solution, including integration with the future technology stack.

3. Pricing

Please provide a detailed timeline and cost estimate for the project, broken down into the categories of review. Pricing and fee schedules should be on an hourly rate and sufficiently descriptive to facilitate acceptance of a proposal.

List the not-to-exceed (NTE) amount you propose for consulting services. Pricing should also outline all estimated expenses, such as travel, lodging, printing and mailing, and miscellaneous expenses, which are separately reimbursable.

The TRUs+PSU at their sole discretion, may opt to move forward with only selected categories based on priorities and proposed cost structure or stagger each category into a separate timeframe.

SECTION IV – CONTRACT TERMS AND REQUIRED DOCUMENTS

NOTICE OF INTEREST

RFP #2025-01 SHARED SERVICES

Name of Consultant/Firm: _____

Check One:

_____ Yes, this firm will submit a proposal in response to this RFP. Please forward any addenda to the RFP to my attention.

_____ No, this firm does not anticipate submitting a proposal in response to this request.

Comments:

Signature: _____ Date: _____

Name: _____ Title: _____

Address: _____

City/State/Zip: _____ Phone: () _____

E-mail: _____

Please email the completed Notice of Interest no later than February 24, 2025, at 5:00 PM PT to Purchasing@oit.edu.

**BIDDER/PROPOSER
NON-DISCRIMINATION AND OREGON TAX LAWS CERTIFICATION**

**RFP #2025-01
SHARED SERVICES**

I, the undersigned, have read all of the terms and conditions of this Request for Proposals, and I understand that if awarded the contract, I and the firm represented herein shall be bound by its terms and conditions and representations made in this response. I certify that the named firm has not discriminated against minority, women, or emerging small business enterprises in obtaining any required subcontracts.

Certified Minority, Women, or Emerging Small Business

For statistical purposes only, please indicate if your firm is an Oregon certified minority, women, or emerging small business (check all applicable): DBE MBE WBE ESB

Certificate of Compliance with Oregon Tax Laws

I, the undersigned, (check one):

- hereby certify under penalty of perjury that I am not in violation of any Oregon Tax Laws.
- hereby certify under penalty of perjury that I am authorized to act on behalf of the firm herein named and to the best of my knowledge, such firm is not in violation of any Oregon Tax Laws.

For purposes of this certification, "Oregon Tax Laws" means a state tax imposed by Oregon Revised Statutes (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.

Business Designation (check one): Corporation Partnership Sole Proprietorship
 Governmental/Non-Profit Limited Partnership Limited Liability Partnership
 Limited Liability Company

Signature: _____ Date: _____

Print Name: _____ Title: _____

Firm Name: _____

Address: _____

City/State/Zip: _____ Phone: () _____

E-mail: _____

EXHIBIT A

OREGON TECH SAMPLE CONTRACT

[Please see attached.]