

**COVER PAGE**

**Oregon Clover Commission (OCC)**

**ADMINISTRATIVE SERVICES**

Request for Proposal (RFP)

**PROPOSAL NUMBER CLOVER-001-2025-26-664**

Date of Issue: April 4, 2025

Closing Date and Time: May 27, 2025 by 1:00 p.m. PST

Single Point of Contact (SPC): Bryan Ostlund  
Oregon Clover Commission

Send Proposals to:

Address: PO Box 3366

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If delivered through carrier other than USPS, please deliver to:

Address: 4093 12<sup>th</sup> Street Cut Off SE

City, State, Zip: Salem, OR 97302

Proposal requirements, format and delivery details are in Sections 3, 4, and 5.

The State of Oregon promotes equal opportunity for all individuals without regard to age, color, disability, marital status, national origin, race, religion or creed, sex or gender, sexual orientation, or veteran status.

## SECTION 1: GENERAL INFORMATION

### 1.1 INTRODUCTION

The Oregon Clover Commission (OCC) or Commission is issuing this Request for a Proposal (RFP) for administrative services to be provided from September 1, 2025 to June 30, 2026, with the option to renew annually. The Commission will begin the contract September 1, 2025 for purposes of transition and on-boarding.

Commission's intent for this RFP is to award a Personal Services Contract. Additional details on the Scope of the goods or services or both are included in the Scope of Work/Specifications section below.

The Commission must approve all contracts, including the administrative services contract, annually.

### 1.2 BACKGROUND

#### Oregon Clover Commission (OCC)

The OCC is a state commodity commission created under ORS 576. and works on behalf of approximately 400 producers of clover seed in the state of Oregon. The Commission is directed by a board comprised of seven producers, two handlers (first purchasers), and a public member who are all appointed by the Director of the Oregon Department of Agriculture (ODA). Committed to improving the industry, the Commissioners are volunteers; they have full-time jobs in Oregon's clover seed and agricultural industries.

The OCC meets an average of five times a fiscal year (October through June). The Commission does not have committee meetings. All business is conducted with the Commission as a whole at their regular meetings.

As an Oregon commodity commission, the OCC is authorized under Oregon Revised Statute (ORS) 576.325 to collect a mandatory assessment on clover seed grown in Oregon. Any first purchaser shall deduct and withhold an assessment of 1/2 percent total gross sale prior to any deducted value of product paid to the producer thereof, for all clover seed produced in Oregon, then send the assessments to the OCC office on a quarterly basis.

The OCC website is [www.oregonclover.org](http://www.oregonclover.org)

In addition to the mandatory assessments, commodity commissions are permitted to receive funds from other sources, such as sponsorships, research contributions and grants for special projects.

All commodity commissions are public agencies established by the Oregon legislature. All commodity commissions comply with Oregon's public meeting and public records law, ORS chapter 192; Oregon government ethics law, ORS chapter 244; and other applicable state laws, rules and required financial reporting. All commodity commissions adopt budgets each year in a public hearing process set forth in ORS 576.416 and are subject to audit; see OAR Chapter 603, Division 42.

The Director of the Oregon Department of Agriculture (ODA) appoints all commissioners, who must meet qualifications set in ORS 576.225 and Oregon Administrative Rule (OAR) Chapter 664, Division 15. Oregon State University (OSU) and the Oregon Department of Agriculture (ODA) are represented on the Commission by ex-officio non-voting members, designated by the OSU Dean and the ODA Director, respectively. The ODA Commodity Commission Oversight Program (pursuant to ORS 576.066) reviews the Commission’s annual operational plan, all contracts and other agreements, and provides resources and technical advice.

**1.3 AUTHORITY AND METHOD**

A Commission is authorized to enter into a contract for personal services pursuant to ORS 576.304(4) and 576.306(1) consistent with OAR Chapter 122, Division 50 and OAR Chapter 603, Division 42, as applicable. All contracts are reviewed by the ODA pursuant to ORS 576.306(9) and OAR 603-042-0010(10), and, for contracts exceeding \$250,000.00, the contract must be approved by the Oregon Department of Justice (DOJ) prior to execution.

Commodity commissions are authorized pursuant to ORS 576.051 to 576.595 to contract with an independent contractor for administrative services but may not contract to perform the discretionary functions of the commission. Discretionary functions do not include collecting assessments, scheduling meetings, processing payments or other administrative duties assigned by the commission.

Commodity commission contractors are independent contractors and not employees, eligible employees, public employees or employees of the state for purposes of Oregon law. A contractor may not be considered a public official, public officer, state officer or executive official for purposes of Oregon law.

**1.4 SCHEDULE**

The table below represents a tentative schedule of events. All times are listed in Pacific Time. All dates listed are subject to change.

Event	Date	Time/Location
Questions / Requests for Clarification Due to SPC	Monday, April 28, 2025	Due by 4:00 PM to SPC via email to bryan@ostlund.com
Answers to Questions / Requests for Clarification	Thursday, May 1, 2025	Posted by 1:00 PM on oregonclover.org
Closing (Proposal Due) to SPC	Tuesday, May 27, 2025	Delivery no later than 1:00 PM
Interviews	On or around June 10, 2025	Via Zoom video conferencing. Successful proposers will be notified of their interview time in advance by June 6, 2025
Issuance of Notice of Intent to Award (approximate date)	No later than Friday, June 30, 2025	Phone and email to highest scoring proposer. Notice via email to all but highest scoring.

## SECTION 2: SCOPE OF WORK

### 2.1 SCOPE OF WORK/SPECIFICATIONS

The Commission is seeking an administrative services contractor to carry out the daily business affairs of the Commission. The commission intends to issue a contract for administrative services.

The commissioners are public officials volunteering their time to the industry. Each commissioner has a full-time job in addition to their Commission duties. The producer commissioners are clover seed growers, the handler commissioners work for processors that are a first purchaser of Oregon clover seed, and the public member is interested in the positive economic development of the commodity.

The administrative services contractor carries out the policies, procedures and directives previously approved by the Commission during public meetings. The chairperson administers the contract between the Commission and the administrative services contractor. The administrative services contractor frequently consults with the chairperson, vice chairperson, secretary/treasurer, and the ODA Commodity Commission Oversight Program manager.

On an annual basis, the Commission separately evaluates the administrative services contractor’s performance. The Commission must approve the administrative services contract on an annual basis.

Commodity commissions are authorized to collect mandatory assessments by statute. During public meetings, the commissioners discuss and approve motions to direct funds toward promotion, education, communication, research, administrative and other costs.

The Commission's administrative services needs include:

**2.1.1 Office Facility & Equipment**

- a. Providing the office equipment, computer and compatible software, data back-up system, phone and voicemail systems, and personnel the Commission considers necessary;
- b. Providing office space and storage for Commission's records and public relations materials and products (approximately forty bankers boxes);
- c. Performing maintenance of Commission's public records in a timely manner pursuant to OAR Chapter 166, Divisions 030, 300, and 350;
- d. As required by ORS 576.385, obtaining and filing with Commission a fidelity bond of \$50,000. Submitting reimbursement request for the cost of this bond;
- e. Paying, and holding the Commission harmless from, all of the contractor's normal operational expenses, including but not limited to salaries, rents, utilities, taxes and fees (such as income, employment, license or others) and other similar expenses;
- f. Maintaining compliance with all governmental (local, state, or federal) laws and rules applicable to the operation of Independent Contractor's business.

**2.1.2 Bookkeeping and Financial Management**

- a. Managing the Commission's assessment program in accordance with OAR Chapter 664, Division 010, which includes providing reporting forms, receiving and depositing assessments, recordkeeping, collecting late assessments, and reporting to the Commissions on delinquencies, among other duties;
- b. Receiving and depositing other funds;
- c. Preparing payment of Commission's approved expenses for signature by commissioners;
- d. Preparing periodic quarterly reports on revenue and providing them to ODA on a timely basis;
- e. Maintaining and updating information related to clover seed production to forecast the Commission's future assessment income for budgeting and planning purposes;
- f. Assisting the chairperson and commissioners with all functions necessary to prepare annual draft budgets pursuant to ORS 576.416, advertise the budget hearings, conduct the budget hearings, and submit required adopted budget materials to ODA for authorization;
- g. Preparing financial reports, state-required year-end financial statements, other reports and related financial records pursuant to ORS 576.395;
- h. Monitoring Commission's finances monthly and providing both written and verbal reports on monthly Commission's finances (balance sheet, monthly check activity, monthly transactions, revenue & expenditure statement, reconciliations for a checking account, money market/savings accounts) at each Commission meeting;
- i. Soliciting, collecting and depositing payments for sponsorships to the Clover Growers Annual Meeting;
- j. Alerting Commission's leadership to critical financial occurrences, for example: revenues are less than forecasted in the annual budget or expenses in a budget category will or are being exceeded;

- k. Obtaining information on marketing trends and commodity values at request of Commissions; however, contractor must obtain approval of informational content from Commissions before its dissemination;
- l. Preparing requests to ODA for emergency fund transfer when necessary;
- m. Ensuring receipt of commissioner expense reports and preparing reimbursements and their recordkeeping;
- n. Acting in compliance with applicable laws, OARs, generally accepted accounting principles, and the Commission's Policies and Procedures Manuals.

### **2.1.3 Communications & Meeting Planning**

- a. Assisting the chairperson with scheduling meetings;
- b. Providing legally required notices of meetings and hearings pursuant to ORS 192 and ORS 576.416;
- c. Assisting committee chairpersons with preparing meeting agendas and providing notices of committee meetings;
- d. Scheduling and setting up ADA-accessible meeting rooms, and catering service;
- e. Preparing and providing copies (digital or paper depending on commissioners' preference) of packets for commission and committee meetings;
- f. Taking notes and preparing draft minutes of Commission's meetings;
- g. Providing information to growers, buyers, agencies, industries, news media and others that is consistent with approved Commission positions; however, contractor must obtain approval of informational content from Commissions before its dissemination, as provided by OAR 603-042-0015(6);
- h. Representing Commission at hearings or meetings on proposed legislation, rules, or issues affecting Commission and producers/handlers at request of Commission; however, contractor must obtain prior approval from Commission of all positions that may be taken on behalf of Commission;
- i. If approved in advance by Commission, traveling to assist Commission to fulfill its promotional, educational or research purposes. Contractor will submit request for reimbursement of allowable travel expenses in accordance with Exhibit A, the Sample Administrative Services contract, Section 3 and Section II;
- j. Updating information on the Commission's website in a timely manner. Contractor will manage domain renewal, maintain and update all pages on the Oregon Clover Commission website;
- k. Assist the Commission in soliciting research RFPs; produce annual research proposals and progress reports booklets; establish Commission's industry research priorities annually;
- l. Work with the Commission to put together the program agenda for the Clover Growers Annual Meeting, handle meeting registrations, solicit meeting sponsorships and manage on-site conference responsibilities;
- m. May recommend advertising, domestic and export marketing and communication programs to Commission and, with Commission's approval, implement such programs. Costs incurred by the Contractor must be pre-approved by Commission or Contract Administrator.

### **2.1.4 Administrative and Time Management**

- a. Preparing annual Operational Plans for Commission approval, and submitting plans to ODA pursuant to OAR 603-042-0015;
- b. Maintaining the domain name oregonclover.org;

- c. Maintaining records of Commission and committee minutes, actions and other records pursuant to ORS 192 and ORS 576;
- d. Maintaining databases in a timely manner, including producer mailing lists, meeting mailing lists, and handler lists;
- e. Maintaining and updating a list of interested parties;
- f. After Commission approval, prepare contracts and similar documents in a timely manner according to procedures which include but may not be limited to:
  - i. completing templates prepared by the Oregon Department of Justice and provided by ODA's Commodity Commission Oversight Program;
  - ii. writing a statement of work;
  - iii. emailing completed document to ODA for review;
  - iv. providing additional information to ODA on a timely basis when requested;
  - v. after ODA completes review, obtaining contractor and Chairperson or delegated Commission signatures;
  - vi. providing one fully signed digital document to ODA;
  - vii. maintaining one fully signed document in commission records;
  - viii. providing contractor with one fully signed document;
- g. When delegated and authorized in writing by the Commission, monitoring a contractor's work to ensure that services are performed and deliverables delivered according to the schedule in the contract;
- h. Preparing and filing administrative rules in a timely manner;
- i. Participating in training on applicable state laws, policies and other administrative training.

### **2.1.5 Interpersonal Skills & Regulatory Compliance Experience**

- a. Establishing and maintaining communications and good working relationships with commissioners;
- b. Staying current on state, regional, and national matters that affect Oregon clover seed growers and processors, then informing the chairpersons in a timely fashion;
- c. Informing the chairperson in a timely manner of matters that need to be brought to the Commission's attention for discussion and action;
- d. Informing the chairperson in a timely manner of matters related to delayed assessments, producer and handler concerns and other subjects requiring the Commission's immediate attention;
- e. Establishing and maintaining good communications and working relationships with the Oregon Department of Agriculture, Oregon State University, USDA-ARS, Oregon's other forage commissions (Oregon Tall Fescue Commission and Oregon Ryegrass Seed Growers Commission), Oregon Seed Council, Oregonians for Food & Shelter, Oregon Ag Fest and other organizations with interests in common with the Commission;
- f. Establishing and maintaining good communications and working relationships and acting as liaison with other industry organizations in the state, region, and nation; however, contractor must obtain prior approval from Commission of all positions that may be taken on behalf of Commission;
- g. To the extent that the Commission elects, collaborating with other commodity commissions;

- h. Establishing and maintaining good working relationships with, collaborating with, and consulting with the ODA Commodity Commission Oversight Program;
- i. Assisting ODA with recruitment of applicants for commissioner positions;
- j. Working with ODA to ensure that commissioners successfully complete mandatory trainings;
- k. Assisting ODA Commodity Commission Oversight Program with orientation of commissioners;
- l. Establishing and maintaining good communications and working relationships with all contractors supplying services and goods to the Commission.
- m. Work with the ODA and the USDA to facilitate the South Korea export program.

## **2.2 ADDITIONAL INFORMATION RELATED TO THE WORK**

- 2.2.1 The successful submitted proposal will be incorporated into final contracts between the Commission and the successful Proposer, which will include the terms and conditions as set forth in the attached Sample Contract (Exhibit A).
- 2.2.2 The current Administrator is retiring on or about September 1, 2025.

## **SECTION 3: PROCUREMENT REQUIREMENTS**

### **3.1 MINIMUM QUALIFICATIONS –**

- 1. Available to begin providing services to Commission no later than September 1, 2025. The Commission will begin the contract September 1, 2025.
- 2. Five years of successful experience in administrative work including financial reporting, arranging for meetings, writing reports or minutes, record-keeping, preparing and distributing communications, and monitoring timely and quality delivery of contracted services, and/or
- 3. Five years of successful experience administering volunteer organization(s), working with board members, carrying out direction and priorities set by a board, drafting meeting agendas and other meeting materials, delivering verbal and written reports.
- 4. Five years of years of successful experience in organizing meetings or in event planning.
- 5. Five years of successful experience in budget processes, financial reporting, accounts receivable and bookkeeping processes.
- 6. Experience or familiarity with working with technical subjects such as bylaws, laws, government, government regulations, or research projects.
- 7. Demonstrated excellent written and verbal communication skills including public speaking and reporting during meetings.
- 8. Proven success in prioritizing multiple time-sensitive tasks and meeting deadlines.
- 9. Ability to provide staff, office equipment, computer software compatible with Commission's existing software (Word, Excel, Access, PowerPoint), high-speed internet, secure data storage space and back-up system, file storage space, and phones with reliable voicemail system.
- 10. Have a driver's license and insurance, with an acceptable driver's record or an alternative means of transportation

### **3.2. ADDITIONAL CERTIFICATION REQUIREMENT**



To submit a Proposal, Proposer must meet the Independent Contractor Certification, shown below. The certification is part of Exhibit A, Sample Contract.

**INDEPENDENT CONTRACTOR CERTIFICATION**

**A. CONTRACTOR IS AN INDEPENDENT CONTRACTOR**

- 1. I am free from direction and control over the means and manner of providing the services, subject only to the right of the person for whom the services are provided to specify the desired results;
- 2. I am registered under ORS Chapter 58, 60, 62, 63, 65, 67, 70 or 648 to provide the services, if such registration is required.
- 3. I am responsible for obtaining other licenses or certificates necessary to provide the services.
- 4. I am customarily engaged in an independently established business because three of the following requirements are satisfied:
  - A. I maintain a business location:
    - 1) That is separate from the business or work location of the person for whom the services are provided; or
    - 2) That is in a portion of my residence, and that portion is used primarily for business.
  - B. I bear the risk of loss related to the business or the provision of services as shown by factors such as:
    - 1) Entering into a fixed-price contract;
    - 2) Being required to correct defective work;
    - 3) Warranting the services provided; or
    - 4) Negotiating indemnification agreements, or purchasing indemnification liability insurance, performance bonds or errors and omissions insurance.
  - C. I provide contracted services for two or more different persons within a 12-month period, or routinely engage in business advertising, solicitation or other marketing efforts reasonably calculated to obtain new contracts to provide similar services.
  - D. I make a significant investment in the business, through means such as:
    - 1) Purchasing tools or equipment necessary to provide the services;
    - 2) Paying for the premises or facilities where the services are provided; or
    - 3) Paying for licenses, certificates or specialized training require to provide the services.
  - E. I have the authority to hire other persons to provide or to assist in providing the services and have the authority to fire those persons.

(Section 4 does not apply if a Person files a Schedule F as part of an income tax return and the Person provides farm labor or farm services that are reportable on Schedule C of an income tax return.)

**SECTION 4: SUBMISSION REQUIREMENTS**

**4.1. MINIMUM SUBMISSION REQUIREMENTS**

**4.1.1. Proposal Submissions**

As used in this RFP, “Proposal” refers to the complete package of required materials submitted to the SPC, including Attachments A – F as described below. “Proposal for Services” refers to Attachment B only.

To be considered for evaluation, the Proposal must contain each of the following elements (further detailed in Proposal Requirements section below):

- a. Executive Summary of Proposed Services (Label as Attachment A)
- b. Proposal for Services (Label as Attachment B)
- c. Proposed Timeline for Provision of Services (Label as Attachment C)
- d. Proposer Information and Certification Sheet (Exhibit D of RFP, label as Attachment D)

- e. Cost Proposal stated as a base fixed fee for administrative services and separately showing any costs for materials. (Label as Attachment E). Place your Cost Proposal in a sealed envelope marked with Proposer Name and RFP number. (\*The Commission will reimburse invoices at cost-only, without mark-up, for commission meeting rooms and related catering for meetings; commission business-related travel, mileage, postage; and the required bond.). (Submit Cost Proposal in a separate envelope, labeled on the outside with Cost Proposal, the RFP title, number, and Proposer's name. Do not include Cost Proposal or refer to your Cost Proposal in any other part of your Proposal.)
- f. Key Persons and Resumes (Label as Attachment E)

#### **4.1.2. Proposal Format and Quantity**

Proposer shall send its Proposal to the Single Point of Contact (SPC) listed on the first page by the Closing Date and Time. The Proposal, including all attachments, must be in a sealed package with the Proposer's name and the RFP Title and Number clearly visible on the outside of the package. Inside the package, the Cost Proposal needs to be in a separate sealed envelope, labeled Cost Proposal with the RFP Title, Number, and the Proposer's name.

Proposal should follow the format and reference the sections listed in the Proposal Requirements section. Responses to each section and subsection should be labeled to indicate the item being addressed.

Proposal shall be submitted to the SPC in two (2) formats:

- A. One (1) printed copy of Attachments A – D and F on 8 ½" x 11" paper, and one (1) printed copy of Cost Proposal (Attachment E) in a separate sealed envelope labeled with Proposer Name and RFP title and number; and
- B. One (1) electronic copy of Attachments A – D and F on a USB Drive, with a separate file for the Cost Proposal (Attachment E). Proposer's electronic copy must be formatted using Adobe Acrobat (pdf), Microsoft Word (docx), or Microsoft Excel (xlsx).

The Proposal for Services (Attachment B) must follow the format and reference the sections listed in Section 4.2.2. Responses to each section and subsection should be labeled with the corresponding number to indicate the item being addressed.

The Proposer Information and Certification Sheet (Attachment D) must bear the Proposer's authorized representative's Signature. Failure of the authorized representative to sign the Proposal may subject the Proposal to be rejected by the Commission.

#### **4.2. PROPOSAL REQUIREMENTS**

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

Proposal should not include materials not essential to the utility and clarity of the Proposal. Proposal should be straightforward and address the requests of the RFP. Proposal containing excess material not addressing the RFP requirements may receive a lower evaluation score if specific information addressing RFP requirements is difficult to locate.

#### **4.2.1. Executive Summary (label as Attachment A)**

Provide a brief overview of your Proposal.

#### **4.2.2. Proposal for Services (label as Attachment B)**

##### **4.2.2.1. Evaluation Item 1 – Office Facility and Equipment**

Describe your office facility, equipment and those who will provide administrative services:

- I. Office location and equipment including types of software;
- II. Phone and voicemail system;
- III. Internet speed;
- IV. Electronic storage system and capacity;
- V. Electronic back-up system;
- VI. Storage capacity for paper records of both a confidential and public nature;
- VII. Personnel support structure, if any;
- VIII. Identify portions of the required administrative services that you may want to subcontract, if any.

##### **4.2.2.2. Evaluation Item 2 – Bookkeeping and Financial Management**

Identifying all computer software you have used, describe your experiences, including the number of years, preparing, presenting verbal and written reports on, as well as maintaining records of:

- I. Accounts payable and receivable, identifying who will handle which;
- II. Monthly financial reports;
- III. Bank reconciliations;
- IV. Annual financial reports;
- V. Preparing for and responding to audits;
- VI. Administering grant funds and reporting;
- VII. Provide an example of analyzing several years of annual financial reports and identifying a fiscal trend that called for a decision by the client -- either increasing revenue or modifying spending. Be specific about how you identified the trend, who you reported it to, and what type of changes you recommended.

##### **4.2.2.3. Evaluation Item 3 – Communications and Meeting Planning**

Describe your experiences and number of years spent in:

- I. Writing and preparing reports, minutes, correspondence, newsletters: identify all computer software you have used and describe your skill level with each;
- II. Verbal communication as it relates to public speaking, presenting reports, managing meetings or assisting someone who is managing a meeting;
- III. Organizing meetings, conferences and events;
- IV. Maintaining and updating websites in a timely manner;
- V. Establishing and maintaining communication with board members, industry, government agencies, elected officials, and stakeholders.

##### **4.2.2.4. Evaluation Item 4 – Time Management**

- I. Describe your time commitments and requirements to other clients. Include both current and any you anticipate adding during September 1, 2025 through June 30, 2026;

- II. Describe the type of time management skills you have used to manage all responsibilities well;
- III. Explain how you adjust your work-flow when a client has an unanticipated need that requires immediate attention;
- IV. Provide an example of your experience delivering projects within specified deadlines;
- V. Explain your experience and provide an example of completing tasks with minimal oversight.

**4.2.2.5. Evaluation Item 5 – Interpersonal Skills & Regulatory Compliance Experience**

- I. Describe your experiences, including the number of years spent, working with a variety of people, including:
  - a. Boards of directors as a whole and volunteer board members;
  - b. The public;
  - c. Researchers;
  - d. Government staff and elected officials;
  - e. Members of an organization or business that you provide administrative services to; and
- II. Give an example of previous experience complying with rules, regulations, bylaws, policies and/or procedures.

**SECTION 5: ADDITIONAL REQUIREMENTS**

**5.1. PROPOSED TIMELINE FOR PROVISION OF SERVICES (LABEL AS ATTACHMENT C)**

Describe how you plan to meet the deadlines related to the Commission’s administrative services work. Address any conflicts your current work may present vis-a-vis the Commission’s major work elements.

To assist Proposers, the following table highlights the major activities of the Commission’s administrative services work elements. It does so with estimated dates for major work elements. *The following table DOES NOT present a complete calendar of work for the Commission’s administrative services contractor.*

Major Work Elements	Date	Notes
Regular meetings of the full Commission	Periodically between September and June.  With the Commission, determine at least five dates for in-person meetings, with a virtual option	Schedule meeting location and catering, draft agenda with chairperson, provide meeting notice, prepare and make copies of meeting packets which include financial reports, minutes from the previous meeting and other materials, take notes, prepare draft minutes and follow-up on meeting actions and requests.

<p><u>Assessment Process</u> Prior to the dates listed, update Assessment Report forms if necessary. Notify and provide blank Assessment Report forms to first purchasers either through USPS, via email or posting on commission's website.  Receiving assessments involves record-keeping and bank deposits.</p>	<p>Receive quarterly assessment reports and assessment checks (July, October, January and April) – the commission's source of operational revenue  (See bottom of this chart for the monthly average of the number of checks received and checks written for the Commission.)</p>	<p>Receive Assessment Reports. Reconcile Reports received with Commission's list of Handlers. Record Assessment Report data. Inform Commissioners of any discrepancies. Update Grower listings per Assessment Reports.  Utilize collection procedures as necessary.</p>
<p>Income Reports – ODA Census Reports – form provided by ODA and submitted via email quarterly</p>	<p>Approximately January 15, April 15, July 15 and October 15.</p>	<p>Report total monthly assessments and other funds received for the quarter. Email Excel form to ODA. This report is required even when revenue is zero.</p>
<p>Budget Preparation &amp; Adoption Process – ODA provided template</p>	<p>In February, prepare budget preparation packets for March meeting. Use history to provide projections and estimates for Commission to create proposed budget. The budget hearing is usually held before early May. The mandatory public hearing notice requires publication a specific number of days before the budget hearing.</p>	<p>Process includes drafting a budget, holding a budget committee meeting in March (the budget committee consists of the entire Commission), notification immediately after March meeting, public hearing in early May, adoption of budget, notarizing budget affidavit, submitting required documents to ODA for authorization to spend funds by end of May.</p>
<p>Year-end Financial Statement and other state-required financial and online risk reports</p>	<p>This work takes place approximately July 1 through July 18 and continues sporadically through September.</p>	<p>State of Oregon requirement. Some forms provided by ODA about three weeks before due date.</p>
<p>Assist ODA with process of recruiting candidates for commissioner.</p>	<p>Periodically January through March</p>	<p>Verify which commissioner positions expire June 30 of that year. Outreach to producers and handlers who qualify to apply.</p>
<p>Add newly appointed commissioner(s) to commission records.</p>	<p>June</p>	<p>ODA provides a copy of commissioner appointment letter(s) and application(s).</p>

Help ODA provide new commissioners access to the ODA's hour-long orientation to commissioners.	Prior to or during first Commission meeting of the new fiscal year; in-person or virtually.	Orientation covers commission budgeting, selection process for research and promotional projects. Also covers Oregon public records and meeting law, Oregon ethics law.																																							
Assist newly appointed and reappointed commissioners to ensure successful completion of mandatory Workday Learning - Oregon training.	Approximately August - September	Governor requires all commissioners and public employees to complete training on specific state policies.																																							
Clover Research RFPs and Research Booklets.	Approximately October - March	Work with the Commission to establish priorities; work with ARF to coordinate booklets; communicate with researchers regarding grants.																																							
Help put together program for Clover Growers Annual Meeting, manage registrations, solicit sponsorships, manage conference facilities.	Approximately October - February	Work with the Commission, utilize existing databases for registrations and meeting sponsorship solicitations.																																							
Manage Commission's Trade Show Participation. Reserve exhibit booth(s) and hotel room(s), order booth furniture, etc. Ship materials to show(s).	Approximately October - May	Coordinate with the Oregon Tall Fescue Commission and Oregon Ryegrass Commission.																																							
<p>Monthly Transactions Three-Year Average</p> <table border="1"> <thead> <tr> <th></th> <th>Oregon Clover Commission # Checks Deposited</th> <th># Checks Written</th> </tr> </thead> <tbody> <tr><td>July</td><td>26</td><td>4</td></tr> <tr><td>August</td><td>2</td><td>5</td></tr> <tr><td>September</td><td>0</td><td>1</td></tr> <tr><td>October</td><td>38</td><td>2</td></tr> <tr><td>November</td><td>18</td><td>3</td></tr> <tr><td>December</td><td>3</td><td>5</td></tr> <tr><td>January</td><td>31</td><td>3</td></tr> <tr><td>February</td><td>2</td><td>12</td></tr> <tr><td>March</td><td>0</td><td>4</td></tr> <tr><td>April</td><td>36</td><td>2</td></tr> <tr><td>May</td><td>2</td><td>3</td></tr> <tr><td>June</td><td>1</td><td>1</td></tr> </tbody> </table>		Oregon Clover Commission # Checks Deposited	# Checks Written	July	26	4	August	2	5	September	0	1	October	38	2	November	18	3	December	3	5	January	31	3	February	2	12	March	0	4	April	36	2	May	2	3	June	1	1		
	Oregon Clover Commission # Checks Deposited	# Checks Written																																							
July	26	4																																							
August	2	5																																							
September	0	1																																							
October	38	2																																							
November	18	3																																							
December	3	5																																							
January	31	3																																							
February	2	12																																							
March	0	4																																							
April	36	2																																							
May	2	3																																							
June	1	1																																							

**5.2 PROPOSER INFORMATION AND CERTIFICATION SHEET (LABEL AS ATTACHMENT D)**

Complete the Proposer Information and Certification Sheet, attached to this RFP as Exhibit D. Label your completed Proposer Information and Certification Sheet as Attachment D. As provided in the Proposer Information and Certification Sheet,

Proposers must certify that their Proposal constitutes a firm offer for 180 days following Closing of this RFP.

**5.3. COST PROPOSAL (LABEL AS ATTACHMENT E)**

In a separate sealed envelope or electronic file labeled with the Proposer’s name and the RFP title and number, provide one hard copy or electronic file of the proposed cost bid expressed as a base fixed fee for administrative services. The fixed fee should not exceed the funds, \$38,850, that the Commission has budgeted as a maximum fixed cost. Do not include reimbursable items as part of the base fixed fee. The Commissions will reimburse invoices for the cost only for purchases and incurred expenses approved by the Commission such as, but not limited to, meeting rooms and catering for meetings, travel, mileage, postage, printing, materials and supplies for Commission’s administrative needs, including copies, telephone, fax, freight and postage, computer list/address output, website hosting, updating and maintenance expenses, managed automated email fees related to Commission’s business, annual convention costs, educational and promotional project expenses including production and development costs, advertising space, promotional sponsorships and fees, promotional items such as pens, flash drives, hats, mugs and other give-away items, stickers, bookmarks, coloring items, etc., video talent, character talent, social and digital posting and management fees, bus rental and other travel and event costs related to educational and Commission-sponsored events, and for the required bond.

**5.4. REFERENCES**

Provide three (3) references from current or former relevant volunteer or professional organizations for similar work within the last three years. Proposer shall submit reference names and contact information. References must be able to verify the quality of previous, related Work. Commission or SPC will make three attempts to contact each of the references provided by the Proposer. If these attempts are unsuccessful, the Proposer will receive a score of zero for that reference.

Commission may also check to determine if references provided support Proposer’s ability to comply with the requirements of this RFP. Commission may use references to obtain additional information, or verify any information needed. Commission may contact any reference (submitted or not) to verify Proposer’s qualifications.

**5.5. KEY PERSON(S) AND THEIR RESUME(S)**

Specify key person(s) to be assigned to this project (if applicable), and include a current resume (not to exceed 1 page each) for each individual who demonstrates qualifications and experience for the Work described.

**SECTION 6: RFP SOLICITATION PROCESS**

**6.1. PUBLIC NOTICE**

Notification of the availability of this RFP was mailed to the applicable entities on the Oregon Agriculture Commodity Commission (OACC) RFP Mailing List and to those who requested to be

notified by the Commission, and posted on OregonBuys (state procurement website), as well as posted to the Commission's web page.

Modifications, if any, to this RFP will be made through posting on the Commission's website. Prospective Proposers are solely responsible for checking with the Single Point of Contact prior to the RFP Closing Date to determine whether any Addenda have been issued. Addenda are incorporated into the RFP by this reference.

**6.2. QUESTIONS / REQUESTS FOR CLARIFICATIONS**

All inquiries, whether relating to the RFP process, administration, deadline or method of award, or to the intent or technical aspects of the RFP, or relating to the potential Contract terms and conditions, or both, must:

- I. Be delivered to the SPC via email
- II. Reference the RFP Title and Number
- III. Identify Proposer's name, phone, and email information
- IV. Refer to the specific area of the RFP being questioned (i.e. page, section and paragraph number) or Contract term or condition, as applicable; and
- V. Be received by the due date and time for Questions/Requests for Clarification identified in the Schedule

**6.3. PROPOSAL DELIVERY**

Proposer is solely responsible for ensuring its Proposal is received by the SPC before Closing.

Commission is not responsible for any delays in mail or by common carriers or by transmission errors or delays, or for any mis-delivery for any reason. A Proposal submitted by any means not authorized below will be rejected:

A Proposal must be submitted through the mail or via parcel carrier, and must be clearly labeled and submitted in a sealed envelope, package or box. The outside of the sealed submission must clearly identify the Proposer's name and the RFP title and number. It must be sent to the attention of the SPC at the address listed on the Cover Page.

**6.4. PROPOSAL DUE**

A Proposal (including all required submittal items) must be received by the SPC on or before Closing. All Proposal modifications or withdrawals must be received prior to Closing.

**6.5. PROPOSAL REJECTION**

Commission may reject a Proposal for any of the following reasons:

- I. Proposer fails to substantially comply with all prescribed RFP procedures and requirements, including but not limited to the requirement that Proposer's authorized representative sign the Proposal.
- II. Proposer makes any contact regarding this RFP with State representatives such as but not limited to Commission's employees, Commission's contractors, Commissioners or officials other than the SPC or those the SPC authorizes, or



inappropriate contact with the SPC.

- III. Proposer attempts to influence a member of the Evaluation Committee or a Commissioner.
- IV. Proposal is conditioned on Commission's acceptance of any other terms and conditions or rights to negotiate any alternative terms and conditions that are not reasonably related to those expressly authorized for negotiation in the RFP or Addenda.

## 6.6. EVALUATION PROCESS

### 6.6.1. Responsiveness determination

A Proposal will be reviewed to determine if it meets all RFP requirements. If an aspect of the Proposal is unclear, the SPC may request clarification from Proposer. If the SPC finds the Proposal does not meet any one or more requirements of the RFP, including but not limited to compliance with requirement for submission by Closing, the Proposal may be rejected; however, Commission may waive mistakes in its sole discretion.

### 6.6.2. Evaluation Criteria.

Each Proposal that the Commission finds that meets RFP requirements will be independently evaluated by members of an Evaluation Committee. Evaluation Committee members may change. Evaluators will assign a score for each evaluation criterion listed below in this section up to the maximum points available in the Point and Score Calculation section.

SPC may request further clarification to assist the Evaluation Committee in gaining additional understanding of a Proposal. A response to a clarification request must be to clarify or explain portions of the already submitted Proposal and may not contain new information not included in the original Proposal.

The Commission reserves the right to investigate references and past performance of any Proposer with respect to the Proposer's (a) successful performance of similar projects; (b) compliance with specifications and contractual obligations; (c) completion or delivery of a project on schedule; and (d) lawful payment of suppliers, subcontractors, and workers. The Commission reserves the right to postpone the award in order to complete its investigation.

Proposals considered responsive and complete will be evaluated by the Committee using a point scale on the evaluation criteria listed below:

<b>Maximum Possible Points</b>	<b>Qualifications-Based Evaluation Criteria of Proposal</b>
5	Evaluation Item 1 – Office Facility and Equipment
25	Evaluation Item 2 – Bookkeeping and Financial Management
20	Evaluation Item 3 – Communications & Meeting Planning
15	Evaluation Item 4 – Time Management
20	Evaluation Item 5 – Interpersonal Skills & Regulatory Compliance Experience
85	SUBTOTAL of Qualifications-Based Evaluation Score
<u>15</u>	Cost Proposal Score Added
100	SUBTOTAL of Qualifications-Based Evaluation Score and Cost Proposal Score
35	Top scoring Proposals will be invited to interview. The interview score will be added to the SUBTOTAL of the Qualifications-Based Evaluation Score and Cost Proposal Score.
<u>5</u>	References scored for Proposals invited to interview.
140	TOTAL POSSIBLE POINTS

<b>EVALUATOR USE THIS COLUMN WHEN 35 POINTS IS MAXIMUM SCORE</b>	<b>EVALUATOR USE THIS COLUMN WHEN 30 POINTS IS MAXIMUM SCORE</b>	<b>EVALUATOR USE THIS COLUMN WHEN 20 POINTS IS MAXIMUM SCORE</b>	<b>EVALUATOR USE THIS COLUMN WHEN 15 POINTS IS MAXIMUM SCORE</b>	<b>EVALUATOR USE THIS COLUMN WHEN 5 POINTS IS MAXIMUM SCORE</b>	<b>EXPLANATION</b>
35	30	20	15	5	OUTSTANDING - Response meets all the requirements and has demonstrated in a clear and concise manner a thorough knowledge and understanding of the subject matter and project. The Proposer provides insight into its expertise, knowledge, and understanding of the subject matter.
34 - 21	29 - 19	19 - 12	14 - 9	4 - 3	VERY GOOD – Response provides useful information, while showing experience and knowledge within the category. Response demonstrates above average knowledge and ability with no apparent deficiencies noted.
20 - 8	18 - 7	11 - 5	8 - 4	2	ADEQUATE – Response meets all requirements in an adequate manner. Response demonstrates an ability to comply with guidelines, parameters, and requirements with no additional information put forth by the Proposer.
7 - 1	6 - 1	4 - 1	3 - 1	1	FAIR – Proposer meets minimum requirements, but does not demonstrate sufficient knowledge of the subject matter.
0	0	0	0	0	RESPONSE OF NO VALUE – An unacceptable response that does not meet the requirements set forth in the RFP. Proposer has not demonstrated knowledge of the subject matter.

**6.6.2.1. Evaluation Item 1 - Office Facility & Equipment - 5 pts. maximum**

- a. Is Proposer's computer software compatible with the software used by the Commission?
- b. Is the phone, voicemail system, and the internet speed at Proposer's office adequate for OCC needs?
- c. For both electronic and paper records, will the Proposer's storage system and capacity meet the Commission's needs?
- d. Does the proposer's office meet the Commission's needs?
- e. What, if any, personnel support structure does the Proposer have? How well will the Proposer's personnel structure meet the Commission's needs?

**6.6.2.2. Evaluation Item 2 – Bookkeeping & Financial Management - 25 pts. maximum**

- a. What software does Proposer use for bookkeeping and financial management; how many years' experience do they have in:
  - I. Preparing accounts payable and receivable;
  - II. Preparing monthly financial reports (balance sheet, accounts payable, monthly transactions, revenue & expenditure statement, reconciling a checking account), and presenting a verbal summary of those reports;
  - III. Reconciling bank statements;
  - IV. Preparing annual financial reports and completing report forms as provided by others;
  - V. Preparing for and responding to an independent audit;
  - VI. Administering grants funds and preparing reports;
  - VII. Score the Proposer's example of analyzing several years of annual financial reports and identifying a fiscal trend that called for a decision by the client -- either increasing revenue or modifying spending. Proposers should be specific about how they identified the trend, whose attention they brought it to, and what type of changes they recommended.

**6.6.2.3. Evaluation Item 3 - Communications & Meeting Planning - 20 pts. Maximum**

- a. How well does Proposer's preferred method of communicating with clients, both individuals and boards, fit the Commission's needs? Does the Proposer's example of how well they have established and maintained communication with board members, industry, government agencies, elected officials, and stakeholders fit the Commission's needs?
- b. Score the Proposal's information about their ability to write and prepare reports, minutes, correspondence, newsletters. Does the computer software used and skill level with each software work well for the Commission?
- c. Does the Proposal's description of their comfort level and experience with public speaking, presenting verbal and written reports, managing meetings, or assisting someone who is managing a meeting suit the Commission's needs?
- d. How well does the Proposal explain their skills and experience for

organizing meetings of boards and meetings for larger groups?

**6.6.2.4. Evaluation Item 4 – Time Management - 15 pts. Maximum**

- a. How well does Proposal respond to the table showing the Commission’s major administrative work elements on pages 13-15 and their ability to balance competing priorities and multiple deadlines on work for other clients?
- b. How well does Proposal demonstrate adjusting work flow when a client has an unanticipated need that requires immediate attention?
- c. How well does Proposal communicate their ability to perform well in delivering projects within specified deadlines?
- d. Does Proposal assure evaluator that Proposer has performed well in completing tasks with minimal oversight?

**6.6.2.5. Evaluation Item 5 – Interpersonal Skills & Regulatory Compliance - 20 pts. maximum**

- a. How well does Proposal illustrate the ability to address a client’s specified needs while also going above and beyond requirements to provide value-added assistance?
- b. Does Proposer’s experience indicate they work with a wide variety of personality types?
- c. How well has Proposer worked with boards? Review examples of the type of boards Proposer worked with in the last five (5) years. Consider the largest number of board members and the smallest number of board members Proposer worked with. Were the boards non-profit, corporate, association, governmental, etc.?
- d. Does Proposal illustrate previous professional experience complying with rules, regulations, bylaws, policies and/or procedures?

Proposers may be invited to participate in Proposer interviews. Interviews may be in person at a location determined by Commission; however, Commission may elect to conduct interviews via teleconference or virtual conferencing.

**6.6.3. COST EVALUATION**

Following scoring and ranking of Proposals, based on the qualifications-based criteria, the cost proposals will be scored as follows:

- a. Proposer with the lowest price proposal will receive 15 points.
- b. Proposer with the second lowest price proposal will receive 10 points.
- c. Proposer with the third lowest price proposal will receive 5 points.
- d. All other Proposers will receive 0 points.

**6.7. POINT AND SCORE CALCULATIONS**

Scores are the points assigned by each evaluator.

The maximum points possible for each evaluation item are listed in the table below.

The SPC will average all scores for each evaluation criterion.

Cost points are calculated as stated in the Cost Evaluation section.

<b>TOTAL POINTS POSSIBLE:</b>		<b>140</b>
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<b>POINTS POSSIBLE - of Qualification-Based Evaluation Score</b>		<b>85</b>
6.7.2.1.	Evaluation Item 1- Office Facility & Equipment	5
6.7.2.2.	Evaluation item 2 – Bookkeeping & Financial Management	25
6.7.2.3.	Evaluation Item 3 – Communications & Meeting Planning	20
6.7.2.4.	Evaluation Item 4 – Time Management	15
6.7.2.5.	Evaluation Item 5 – Interpersonal Skills & Regulatory Compliance Experience	20

6.7.3.	<b>COST POINTS POSSIBLE</b>	<b>15</b>
	Top Scoring Proposals will be invited to interview	
	Maximum points possible for interview	35
5.4	References	5

**6.8. RANKING OF PROPOSERS**

The SPC will average the scores for each Proposal (calculated by totaling the points awarded by each Evaluation Committee member and dividing by the number of members).

If Commissions receive only one Proposal, Commission may dispense with the evaluation process and intent to award protest period and proceed with Contract award, as Commission deem in its best interest.

**7. AWARD**

**7.1. AWARD NOTIFICATION PROCESS**

**7.1.1. Award**

Commission, if awarding a Contract, shall award a Contract to the highest-ranking Proposer(s) based upon the scoring methodology and process described in Section 6.

**7.1.2. Intent to Award Notice**

Commission will notify all Proposers in Writing that Commission intends to award Contract(s) to the selected Proposer(s) subject to successful negotiation of any negotiable provisions, if any.

Notwithstanding the foregoing, the Commission reserves the right at its sole discretion and without any liability: (1) to amend this RFP, among other reasons, to revise the scope of work or to extend the resulting Contract; (2) to extend the deadline for proposal submission; (3) to determine whether a proposal does or does not substantially comply with the requirements of this RFP; (4) to waive any minor irregularity, informality, or nonconformance with this RFP's requirements; (5) to request references from other public agencies or private businesses regarding the Proposer's previous contract performance; and (6) at any time prior to contract execution (including after announcement of the tentative award): (a) to reject any proposal that fails to substantially comply with all prescribed RFP procedures and requirements; and (b) to reject all proposals received and cancel this RFP upon a finding by Commission that there is good cause and that such cancellation would be in the best interest of the Commission.

## **7.2. APPARENT SUCCESSFUL PROPOSER SUBMISSION REQUIREMENTS**

Proposers who are selected for Contract award(s) under this RFP will be required to submit additional information and comply with the following:

### **7.2.1. Insurance**

Prior to award, Proposers shall secure and demonstrate to Commission proof of insurance as required in the Sample Contract (Exhibit A), if any.

### **7.2.2. Taxpayer Identification Number**

The apparent successful Proposer shall provide its Taxpayer Identification Number (TIN) and backup withholding status on a completed W-9 form when requested by Commission or when the backup withholding status or any other relevant information of Proposer has changed since the last submitted W-9 form, if any.

### **7.2.3. Business Registry**

If selected for award, Proposer shall be duly authorized by the State of Oregon to transact business in the State of Oregon before executing the Contracts. Information about these requirements may be found at <http://sos.oregon.gov/business/pages/register.aspx>

### **7.2.4 Independent Contractor Certification**

When submitting a Proposal, the Proposer must certify that they are an Independent Contractor.

## **8. ADDITIONAL INFORMATION**

### **8.1. GOVERNING LAWS AND REGULATIONS**

This RFP is governed by the laws of the State of Oregon. Venue for any administrative or judicial action relating to this RFP, evaluation and award is the Circuit Court of Marion County for the

State of Oregon; provided, however, if a proceeding must be brought in a federal forum, then it must be brought and conducted solely and exclusively within the United States District Court for the District of Oregon. In no event shall this Section be construed as a waiver by the State of Oregon of any form of defense or immunity, whether sovereign immunity, governmental immunity, immunity based on the eleventh amendment to the Constitution of the United States or otherwise, to or from any Claim or from the jurisdiction of any court.

**8.2. OWNERSHIP/PERMISSION TO USE MATERIALS**

All Proposals are public record and are subject to public inspection after Commission issues the Notice of the Intent to Award. Application of the Oregon Public Records Law will determine whether any information is actually exempt from disclosure.

All Proposals submitted in response to this RFP become the Property of Commission. By submitting a Proposal in response to this RFP, Proposer grants the State a non-exclusive, perpetual, irrevocable, royalty-free license for the rights to copy, distribute, display, prepare derivative works of and transmit the Proposal solely for the purpose of evaluating the Proposal, negotiating an Agreement, if awarded to Proposer, or as otherwise needed to administer the RFP process, and to fulfill obligations under Oregon Public Records Law (ORS 192.410 through 192.505). Proposals, including supporting materials, will not be returned to Proposer.

**8.3. CANCELLATION OF RFP; REJECTION OF PROPOSAL; NO DAMAGES.**

Commission may reject any or all Proposals in-whole or in-part, or may cancel this RFP at any time when the rejection or cancellation is in the best interest of the State, as determined by Commission. Neither the State nor Commission is liable to any Proposer for any loss or expense caused by or resulting from the delay, suspension, or cancellation of the RFP, award, or rejection of any Proposal.

**8.4. COST OF SUBMITTING A PROPOSAL**

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

**8.5. SAMPLE CONTRACT STANDARD TERMS AND CONDITIONS (EXHIBIT A)**

The successful submitted proposal will be incorporated into the final contract between the Commission and the awarded proposer, which will include the terms and conditions as set forth in the attached Sample Contract (Exhibit A), which is incorporated here into this RFP by this reference. The statement of work may be modified.

**8.6. OCC BUDGETS FOR 2019-2024 – (EXHIBIT B, INCORPORATED INTO THIS RFP BY THIS REFERENCE)**

**8.7. OCC ADMINISTRATIVE RULES ON ASSESSMENTS – (EXHIBIT C, INCORPORATED INTO THIS RFP BY THIS REFERENCE)**

**8.8. PROPOSER INFORMATION AND CERTIFICATION SHEET– (EXHIBIT D, INCORPORATED INTO**



THIS RFP BY THIS REFERENCE)

## 8.9. LINKS

Commission Website: [oregonclover.org](http://oregonclover.org)

Oregon Administrative Rules Website: <https://secure.sos.state.or.us/oard/processLogin.action>

Oregon Revised Statutes Chapter 576 Website:  
[https://www.oregonlegislature.gov/bills\\_laws/ors/ors576.html](https://www.oregonlegislature.gov/bills_laws/ors/ors576.html)

Oregon Public Records and Meetings Manual: [www.doj.state.or.us/wp-content/uploads/2024/12/2024-PRM-Manual.pdf](http://www.doj.state.or.us/wp-content/uploads/2024/12/2024-PRM-Manual.pdf)

ODA Commodity Commission Program Website: [www.oda.direct/commissions](http://www.oda.direct/commissions)