

# McKenzie River Trust



## REQUEST FOR PROPOSALS

## WILLAMETTE CONFLUENCE: STAKEHOLDER ENGAGEMENT

**Due Monday, June 30<sup>th</sup>, 2025  
5 PM Local Time**

**Email: Elizabeth Goward, [elizabeth@mckenzieriver.org](mailto:elizabeth@mckenzieriver.org)**

## 1. PROJECT OVERVIEW

### Project Description

This Stakeholder Engagement process will unite stakeholders (Appendix A), including individuals, nonprofits, utilities, and government agencies, making land management decisions within roughly five miles upstream and downstream of the [Willamette Confluence](#) property through a shared 20-year vision and integrated conservation action plan.

The project's geographic scope (Appendix B) focuses on McKenzie River Trust's Willamette Confluence property, Lane County's Howard Buford Recreation Area (Mount Pisgah), and the lower reaches of the two forks of the Willamette River. This work will provide a prioritization framework for a broad coalition of land managers to advance shared goals for land stewardship, habitat restoration, conservation education, public engagement, and infrastructure investments in the area.

Contractors are tasked with researching and analyzing existing area plans provided by McKenzie River Trust, conducting stakeholder interviews, small group listening and work sessions, collaborating with additional contractors to visualize conservation actions through GIS mapping, and finalizing the vision statement into a public-facing document.

### Solicitation Documents

Interested parties can download a complete set of solicitation documents from McKenzie River Trust's website at [www.mckenzieriver.org/bids](http://www.mckenzieriver.org/bids). Changes to the solicitation document will be made only by written addendum. McKenzie River Trust will publish a notice of addenda on the same webpage stated above.

Offers properly submitted and received will be opened immediately following the time offers are due.

### Prequalification

Not Required

## 2. PREPARATION AND SUBMISSION OF OFFERS

**2.1 Offer Preparation.** Offerors are responsible for reading and understanding all portions of the solicitation documents, including attachments and addenda, if any, and for including all requirements in their submittals. To be responsive, offers must be made in writing and address the background, information, questions, criteria, and requests for information contained in the solicitation. Offers must be submitted in the required format and contain all required documents and responses, signed by the Offeror or its authorized representative, and submitted in the manner and number described in the solicitation.

**2.2 Addenda.** Changes to the solicitation document will be made only by written addendum. McKenzie River Trust will publish a notice of addenda on the same webpage stated above. Offerors should frequently check the webpage until closing, i.e., at least once weekly until the week of Closing and at least once daily the week of Closing. Addenda shall not be issued within 72 hours of Closing unless the addendum also extends the Closing. The requirements or

clarifications contained in any addenda issued must be included in the offers received and will become part of any resulting contract.

**2.3 Nondiscrimination.** Submittal of an offer in response to this solicitation evidences the offeror's agreement that in performing the work called for by this solicitation and in securing and supplying materials, the offeror has not and will not discriminate against any person on the basis of (1) race, color, religious creed, political ideas, sex, sexual orientation, source of income, age, marital status, national origin or ancestry (2) physical or mental disability unless the reasonable demands of employment are such that they cannot be met by a person with a particular disability.

**2.4 Offer submission.** Offers must be received by the time and date stated for receipt in the solicitation. To be considered, offers must be submitted in the form and manner stated in the solicitation, complete with an Offeror's Statements & Certifications Form signed by the Offeror or its authorized representative, responses to all criteria and requirements included in the solicitation, other documents required to be submitted, if any, and contain the number of copies required.

By submitting an offer, Offeror acknowledges that the Offeror has read and understands the terms and conditions applicable to this solicitation and accepts and agrees to be bound by the terms and conditions of the contract, including the obligation to perform the scope of work and meet the performance standards.

**2.5 Submittal Format.** To be considered, offers must be submitted electronically in accordance with all the following instructions:

1. Offers must be submitted as an attachment to an email, submitted to the email address stated above,
2. The subject line of the email must clearly identify the submission as a response to this specific solicitation,
3. Unless otherwise stated in the Offer Requirements, documents may be submitted in PDF format only, and
4. Offers must not include .zip files and cannot be more than 30 megabytes in size.

**2.6 Correction, Withdrawal, and Late Submissions.** An Offeror may withdraw its offer at any time prior to the deadline set for receipt of offers, by email to the person identified for receipt of offers and may submit a new sealed offer in the manner stated in the solicitation. McKenzie River Trust will not consider offers received after the time and date indicated for receipt of offers. An Offeror may not modify its offer after it has been submitted other than to address minor informalities as defined by the McKenzie River Trust, unless the offer is withdrawn and resubmitted as described above.

### **3. CLARIFICATION OF SOLICITATION DOCUMENTS**

**3.1 Clarifications.** If an Offeror finds discrepancies or omissions in the solicitation documents or is in doubt as to their meaning, the Offeror must immediately notify the staff member designated for receipt of offers or another person identified for submission of questions.

If the staff member believes a clarification is necessary, an addendum will be issued in writing not less than 72 hours prior to the deadline for receipt of offers, and available on McKenzie River Trusts webpage listed above. Addenda issued within 72 hours of Closing will also postpone the date for submission of offers. The requirements or clarifications contained in any addenda so issued must be included in the offers received and will become part of any resulting contract.

The apparent silence of the solicitation documents regarding any detail, or the apparent omission from the solicitation of a detailed description concerning any point, means that only the best commercial or professional practice, material, or workmanship is to be used.

#### **4. OPENING OF OFFERS**

**4.1 Opening of Offers.** McKenzie River Trust will Open offers as they are received starting on June 2, 2025, until June 30, 2025

**4.2 Late Submissions.** Any offer or modification received after the designated deadline will not be opened or considered.

#### **5. OFFER EVALUATION AND AWARD**

**5.1 Offer Evaluation.** McKenzie River Trust will evaluate offers based on the applicable standards of Responsibility to complete the Scope of Work included in Attachment A and the requirements in Attachment B, which include overall price, qualifications, experience, resources, proposed services, Offeror's past record of performance, and any other factors identified in the solicitation document.

In evaluating offers and selecting a contractor, McKenzie River Trust reserves the right to:

- Reject any and all offers not in compliance with all prescribed procedures, requirements, rules, or laws,
- Issue subsequent solicitations for the same or similar scope of work,
- Not award a contract,
- Waive any irregularities or informalities,
- Accept the offer which the McKenzie River Trust deems to be the most beneficial to the project,
- Negotiate with any Offeror to further amend, modify, redefine, or delineate its offer,
- Negotiate and accept, without re-advertising, the offer of the next-highest scored Offeror, in the event that a contract cannot be successfully negotiated with the selected Offeror,
- Further question any Offeror to substantiate claims of experience, background knowledge, and ability.

**5.2 Mistakes in Offers.** McKenzie River Trust shall reject any Offer in which a mistake is evident on the face of the Offer and the intended correct Offer is not evident or cannot be substantiated from documents submitted with the Offer. McKenzie River Trust may waive, or permit an Offeror to correct, a minor informality.

**5.3 Notice of Award.** McKenzie River Trust will provide written notice of its intent to award to a given Offeror(s) at least 7 days before the award, unless the Trust determines that circumstances justify prompt execution of an award, in which case the Trust may provide a shorter notice period.

**5.4 Rejection of Offers.** McKenzie River Trust may reject offers upon finding that accepting the Offer may impair the integrity of the Procurement process. If all offers are rejected, new offers may be called for in a new solicitation, or the offers received may be considered with an opportunity for supplemental submission from those Offerors that submitted offers if the Trust finds that it is unlikely that re-advertising would lead to greater competition.

## **ATTACHMENT A – SCOPE OF WORK & MINIMUM REQUIREMENTS**

### **1. INTRODUCTION**

The Willamette Confluence is a place of coming together both ecologically and socially. With 1,317 acres of mixed riparian and upland oak habitat in the Mount Pisgah area of the upper Willamette Valley, the property provides significant wildlife habitat near the urban core. Located where the Coast Fork and Middle Fork of the Willamette River converge, the area is rich in biodiversity and opportunities for restoration, collaborative management, and community interaction. The Confluence property is bordered by City, County, nonprofit-owned, and private lands, and is adjacent to the most visited park in Lane County.

### **2. PROJECT BACKGROUND**

Protection of the Willamette Confluence by The Nature Conservancy in Oregon in 2010 was lauded as a significant accomplishment because it secured 1,305 acres of floodplain and associated upland savannah and forest on the urban fringe and adjoining 2,300-acre County park. The property had been previously used as a gravel quarry by Wildish Sand & Gravel, and other proposed future uses included luxury homes, a golf course, and or a convention center. Securing the area for habitat conservation within that proximity to an urban area introduced a mix of constraints and opportunities for restoration and acquisition.

Nearby infrastructure, including paved recreational trails and a boat launch, water utility intakes, proposed residential and commercial development, riverbank revetments, and agricultural operations, all require a heightened level of risk assessment for restoration actions. Closeness to an urban area also tends to increase the price of real estate.

The County park's adjacency has increased calls for greater public access. Soon after the land was acquired, area partners developed internal vision maps that included an extensive trail system, connecting with existing Park trails and with suggested bridge crossings of the Middle Fork. Regional transportation planning and downstream residential/commercial development interests encourage greater access. The current gravel road system that services BPA Power infrastructure may also limit the extent of instream, floodplain, and upland restoration potential.

Neighbors of the area and the primary access road have historically expressed concerns about the increased traffic and associated risks of fire, vandalism, and trespassing that increasing public access to the Confluence and the Park might engender.

McKenzie River Trust acquired the property through transfer from The Nature Conservancy in Oregon in 2023. Since then, staff have been getting to know the land and better understand the opportunities for addressing regional goals related to water quality, fish and wildlife habitat, climate resilience, urban planning, and equity.

The area's concentration of land and water conservation organizations allows many skilled and creative minds to work on the task while necessitating deep collaboration for success. The primary purpose of this engagement project is to facilitate that deep collaboration, with an eye toward decades of work ahead of us as we build out conservation at the Confluence and further upstream in the watersheds.

### **3. Scope of Work**

This project is intended to create a 20-year vision and integrated conservation action plans among community partners vested in the Willamette Confluence, Mt. Pisgah, and the lower reaches of the two forks of the Willamette River. The offeror will convene a range of stakeholders to create a 20-year vision and integrated conservation action plans to provide a prioritization framework for a broad coalition of land managers to advance shared goals for land stewardship, habitat restoration, conservation education, public engagement, and infrastructure investments in the area.

#### Program Specifics

**Task 1:** Conduct research and analysis of existing basin and area plans to identify overlaps and opportunities for collaboration

**Task 2:** Convene stakeholders to develop a 20-year vision statement for the area's future. The vision should include elements of land conservation, restoration, stewardship, community engagement, access, education, urban planning, and infrastructure development.

**Task 3:** Conduct stakeholder interviews and small group listening sessions to build upon the shared 20-year vision and develop actionable plans that address key identified issues, likely to include (1) coordinated land stewardship, (2) habitat restoration potential, (3) recreation and transportation infrastructure, (4) urban expansion and water systems infrastructure, (5) community engagement, (6) environmental education, and (7) additional land conservation opportunities.

**Task 4:** Collaborate with additional contractors to develop a series of maps that articulate a prioritization framework for restoration, acquisition, and public access initiatives on a 5-10-year planning horizon. This work will include conducting small group charrette sessions to identify geographic prioritization for identified action plan strategies.

**Task 5:** Produce a public-facing action plan articulating the shared vision for the Willamette Confluence area and the conservation priorities and actions the public can invest in over the next 10-20 years.

#### **4. Deliverables**

Written summary of the regional plan overlap

Stakeholder Engagement Plan and timeline for engagement

Meeting summaries

Stakeholder interview notes

Area Vision Statement – no more than one page in length

Conservation Action Plans with strategies and tactics addressing:

- coordinated land stewardship,
- habitat restoration potential,
- recreation and transportation infrastructure,
- urban expansion and water systems infrastructure,
- community engagement,
- environmental education, and
- additional land conservation opportunities.

Public-facing vision statement including a high-level overview of conservation priorities (see above)

## **5. Cost**

McKenzie River Trust has budgeted \$60,000 for this project. If services are estimated to exceed this amount, please identify which services could be completed within the budgeted amount, along with a total estimated budget.

**6. Minimum Requirements.** The Offeror must meet the following minimum requirements at the time of offer submission to be considered for award.

- 6.1. Experience successfully performing similar work.
- 6.2. Be in possession of all required certifications, licenses, and required registrations to legally perform the work.
- 6.3. Commit to meeting the highest standards prevalent in the industry or business most closely involved in completing the Scope of Work.
- 6.4. Unless otherwise stated in the Proposal Requirements, proposal documents may be submitted in PDF format only, and
- 6.5. Proposals must not include .zip files, and cannot be more than 30 megabytes in size.

## ATTACHMENT B- REQUIRED SUBMITTALS & EVALUATION CRITERIA

**1. Required Submittals.** The following documents shall be submitted for an Offer to be considered Responsive:

- 1.1. A completed Offeror's Statement and Certifications Form.
- 1.2. Offers shall be in the order and numbering as stated below, be in not less than 10-point font, and be limited to 12 pages, nominal 8.5" x 11" size. Pages used for a cover letter (which may not exceed 2 pages), section dividers, resumes, rate sheets, and exceptions are not included in the page limit.

### 2. Evaluation Criteria

2.1. Offers will be evaluated and ranked based on Total Points using the following criteria:

2.2.1. Initial Written Proposals.

Criteria	Available Points
1. Provide a brief overview of your business. Be sure to include the number of years providing communications and public relations services and the number of employees.	5
2. Describe tools and strategies used to manage a variety of stakeholders, including staff, partner organizations, government agencies, Tribes, utility boards, and community members.	20
3. Describe the project team and roles related to working with McKenzie River Trust to develop, finalize, and implement the project's scope of work.	20
4. Provide relevant example projects your business has completed related to community engagement. Include at least three past-client references.	30
5. Describe your experience collaborating with external contractors to meet shared project goals.	5
6. Describe the breakdown of costs for the scope of work outlined and the anticipated schedule if awarded the contract.	10
7. Describe how your business has incorporated diversity, equity, and inclusion as key tenants in your work. Please specifically identify past projects where you've coordinated with more than one Tribe.	10
<b>TOTAL WRITTEN PROPOSAL POINTS AVAILABLE</b>	<b>100</b>

**2.2. Additional Stages.** If McKenzie River Trust is unable to determine the most advantageous proposal based on the written proposal scoring, the Trust may invite the top proposers to proceed to a further evaluation stage.

## OFFEROR'S STATEMENTS AND CERTIFICATIONS FORM

Offeror's Name: \_\_\_\_\_

Solicitation Title: \_\_\_\_\_

### OFFEROR STATEMENTS

**Offer.** Offeror offers to provide the required goods or services in accordance with the requirements of the solicitation stated above and the enclosed offer. The undersigned Offeror declares that the Offeror has carefully examined the above-named solicitation, including all addenda, and that, if this Offer is accepted, the Offeror will execute a contract with McKenzie River Trust to furnish the goods or services of the Offer submitted with this form. Offeror attests that the information provided is true and accurate to the best of the personal knowledge of the person signing this Offer, and that the person signing has the authority to represent the individual or organization in whose name this Offer is submitted.

**Offeror's Acceptance of Terms and Conditions.** By executing this Form, the undersigned Offeror accepts all terms and conditions of this solicitation and insurance requirements.

### ADDENDA

Offeror has received and considered, in the accompanying offer, the terms of the following addenda, if any:

### CERTIFICATIONS

By signing this Offeror's Certification form, Offeror certifies that:

- 1. Certification of Non-Discrimination.** Offeror has not discriminated and will not discriminate against a subcontractor in awarding a subcontract because the subcontractor is a disadvantaged business enterprise, minority-owned business, woman-owned business, a business that a service-disabled veteran owns, or an emerging small business that is certified under ORS 200.055.
- 2. Certification of Non-Collusion.** This offer is made without connection or agreement with any individual, firm, partnership, corporation, or other entity making an offer for the same services and is in all respects fair and free from collusion or collaboration with any other Offeror.
- 3. Certification of Compliance with Tax Laws.** Offeror has, to the best of Offeror's knowledge, complied with Oregon tax laws in the period prior to the submission of this offer, including:
  - (a) All tax laws of the State of Oregon, including but not limited to ORS 305.620 and ORS chapters 316, 317, and 318,
  - (b) Any tax provisions imposed by a political subdivision of this state that applied to Offeror or its property, goods, services, operations, receipts, income, performance of or compensation for any work performed, and
  - (c) Any rules, regulations, charter provisions, or ordinances that implemented or enforced any of the foregoing tax laws or provisions.

The undersigned, by signature here, acknowledges, accepts, and certifies to the statements and certifications as stated above.

**OFFEROR**

Authorized Signature \_\_\_\_\_ Offerors legal name \_\_\_\_\_

Name of authorized signer

Address

Title

Date

Federal Tax ID

*(Optional)* **CONTACT INFORMATION REGARDING THIS OFFER**

Contact Name \_\_\_\_\_

Telephone Number \_\_\_\_\_

Email Address \_\_\_\_\_

## **APPENDIX A: Willamette Confluence – Identified Stakeholders (Subject to Change)**

City of Eugene Adaptive Recreation, Campbell Senior Center, and Riverhouse

City of Springfield

Coast Fork Willamette Watershed Council

Confederated Tribes of Grand Ronde

Confederated Tribes of Siletz Indians

Confederated Tribes of Warm Springs

Ducks Unlimited

Eugene 4J School District

Eugene Water and Electric Board

Food for Lane County Youth Farm

Friends of Buford Park and Mount Pisgah

Lane County Audubon Society

Lane Council of Governments

Lane County Parks

Lane Independent Living Alliance

Long Tom Watershed Council

McKenzie Watershed Council

Metropolitan Wastewater Management Commission

Middle Fork Willamette Watershed Council

Mount Pisgah Arboretum

Traditional Ecological Inquiry Program

The Nature Conservancy in Oregon

Oregon Department of Fish and Wildlife

Oregon Department of Forestry

Oregon Parks and Recreation District

Seavey Loop Neighbors

Springfield School District

Springfield Utility Board

United States Geological Survey (USGS)

University of Oregon

Upper Willamette Soil and Water Conservation District

Upper Willamette Stewardship Network

Wednesday Wheelers

Wildish Companies

Willamalane Parks and Recreation District

# Willamette Confluence Stakeholder Engagement

## Geographic Scope of Project

