



**REQUEST FOR QUALIFICATIONS  
No. JK183922RFQu**

**Instructors for Professional and Continuing  
Education Courses (PACE)**

**QUALIFIED POOL**

For the time period:  
August 14, 2017 –  
July 31, 2021

**SUBMITTAL LOCATION:**

Oregon State University  
Procurement, Contracts and Materials Management  
644 SW 13th Street  
Corvallis, Oregon 97333  
(541) 737-7353

[jennifer.koehne@oregonstate.edu](mailto:jennifer.koehne@oregonstate.edu)

## 1.0 INTRODUCTION

### 1.01 Introduction:

This Request for Qualifications (RFQu) is to establish a Qualified Pool of experienced Instructors to teach in Oregon State University continuing professional education programs with subject matter expertise across varied content areas and willingness to share their knowledge and wealth of experience with adult students who are eager to learn. Our programs are growing and we need additional highly qualified part-time instructors to teach in the following disciplines: Business, Management, Leadership, Legal, Finance, Accounting, Facilities Management, Conflict Management, Fundraising / Non-Profit Management, Project Management, Agile, Business Analyst, Contract Management, E-Learning Instructional Design, Human Resources Management, Internet Marketing, Marketing & Communications, Personal Financial Planning, Portfolio/Lifecycle Management, Six Sigma Lean, Social Media, Supply Chain Management, Beer and Cider Education, Permaculture, Web Design and Development, Business Intelligence and Data Warehousing, Business Analytics, Data Science / Data Analytics, Information Systems Security (CISSP), SQL Programming, Java Programming & JEE, Microsoft .NET, Mobile Device Application Development, Predictive Analytics, Red Hat Linux, Scrum Master, Software Architect, Software Development, Innovation & Strategy, International Business Operations & Management, Bioinformatics, Communications Systems Engineering Device Software Engineering, Embedded Systems, Environmental Management, Medical Product Development, Regulatory Affairs Management, Systems Engineering, Telecommunications, Systems Thinking, Diversity/Equity/Bias, Engineering - Modeling & Simulation, Information Security Technology and Management, Tool and Die, Cybersecurity, Systems Management, Engineering - Mechanical & Structures, Machine Tooling, Engineering - Aerospace/Aeronautical, Information Security and Assurance, CAD/CAM, Numerical Control, Security Informatics, Composites Assembly/Fabrication/ Technology, Computer Information Systems, Engineering – Systems, Communications, Data Analytics, Computer Science, Aircraft Design, Engineering - Electrical/Electronics, Microsoft Office Suite and other topics requested or proposed.

Ideal candidates have knowledge and professional working experience in the area of expertise, formal or informal teaching experience, and the ability to build lesson plans.

Acceptance into the Qualified Pool only signifies an entity has prequalified and does not obligate OSU to issue a contract. Contracts will be issued on a case by case basis as projects occur.

### 1.02 Background:

Founded in 1868, Oregon State University is a comprehensive, research-extensive, public university located in Corvallis. OSU is a member of the Oregon University System and one of only two American universities to hold the Land Grant, Sea Grant, Space Grant and Sun Grant designations. OSU is also the only Oregon institution to hold the Carnegie Foundation's top ranking for research universities, a recognition of the depth and quality of OSU's graduate education and research programs.

Through its centers, institutes, Extension offices and Experiment Stations, OSU has a presence in almost every one of Oregon's 36 counties, including its main campus in Corvallis, the Hatfield Marine Sciences Center in Newport and OSU-Cascades Campus in Bend. OSU offers undergraduate, master's and doctoral degrees through 12 academic colleges enrolling more than 25,000 students from every county in Oregon, every state in the country and more than 90 nations.

## 2.0 SCOPE OF WORK AND REQUIRED QUALIFICATIONS

### 2.01 Scope of work

#### ➤ Instructor and Teaching Expectations:

##### ○ Facilitation

- In both classroom-based and online courses, PACE encourages instructors to be *facilitators* of learning, which means creating a context in which students learn from each other, other sources and directly from the instructor. It also means instilling a sense of curiosity that motivates students to explore a topic independently thereby potentially uncovering additional layers of knowledge beyond what the course formally addresses. In continuing education, students are often seasoned professionals who have much to share with their classmates. An effective facilitator knows how to use this as a way of

broadening the amount of knowledge to which students are exposed, drawing connections between concepts learned in class with real-world practice. Of course, the personal knowledge and experience instructors bring to their teaching form the basic elements of any effective course.

- Interactive Learning
  - In keeping with the emphasis on facilitation, PACE expects all instructors to create numerous opportunities for students to interact with each other as they learn. In classroom-based courses, this might consist of class discussions and/or periodic breakout sessions in which small groups of students work on classroom assignments together. Online it often involves the use of asynchronous discussion forums, synchronous webinars, and coordinated group projects.
- Assessment
  - For both classroom-based and online courses, it is important to have well-defined, action-oriented learning objectives that are measurable and quantifiable. This means that an instructor can create student learning assessments such as quizzes, term papers, projects, and homework assignments that require students to demonstrate what they can do with the knowledge they acquired in the course. Ideally, each course should have at least two or three different kinds of assessment so that students with different kinds of learning abilities all have an opportunity to perform. In addition, it is vital to provide timely feedback to students on their performance so they have an opportunity to improve.

## 2.02 Sample Contract.

Contractors selected from the Qualified Pool to perform services will be issued a separate contract. A sample contract is included at Exhibit A.

## 2.03 Minimum Required Qualifications

Due to the scope of work and the nature of this Qualified Pool the minimum required qualifications are as follows:

- Knowledge and professional experience in a specialty area.
  - ***Please list your knowledge/experience on Page 1 (Teaching Expertise) of the Instructor Application.***
- A degree in appropriate field of study. A master's degree is preferred, but not required, for some technical disciplines.
  - ***Please list your degree(s) on Page 1 (List universities, colleges, schools) of the Instructor Application.***
- Teaching experience in educational institutions or other settings. Experience in conducting workshops, presentations, and trainings may in some circumstances qualify in lieu of formal teaching experience. Online teaching experience should also be noted.
  - ***Please list your teaching experience on Page 2 (Employment History) of the Instructor Application.***
- Experience building lesson plans; willingness to share lessons learned.
  - ***Please list your lesson plan experience on Page 2 (A Brief Paragraph-Expertise to teach the course) of the Instructor Application.***
- Classroom facilitation skills: creating a safe, supportive, and energetic community that welcomes the various needs and learning styles of your students.
  - ***Please list your skills on Page 3 (Professional Affiliations/Experiences) of the Instructor Application.***

## 2.03 Preferred Qualification

- Master's degree in appropriate field of study. A master's degree is preferred, but not required, for some technical disciplines. An exception to this standard may be appropriate when an instructor can demonstrate an equivalent combination of academic and professional experience.
  - ***Please list your Master's degree(s) on Page 1 (List universities, colleges, schools) of the Instructor Application.***

#### 2.04 Qualified Pool Time Period.

The Qualified Pool will be open for the period August 2016 – July 2021. At any point during this time period, entities who wish to participate in the Qualified Pool may submit their qualifications and will be notified upon acceptance into the pool. Once accepted into the Qualified Pool, the participant does not need to reapply during the time period the pool is open unless rejected from the pool. Acceptance into the pool does not obligate OSU to issue a contract.

#### 2.05 Contract Issuance.

Oregon State University will issue contracts to those participants in the Qualified Pool that best meet the requirements of the individual departmental projects. Performing work without a fully executed Contract may result in non-payment of work performed, or termination of an impending contract.

### **3.0 REQUIRED SUBMITTALS, REVIEW AND SELECTION**

#### 3.01 Required Submittals:

In order to be considered as a participant in this Qualified Pool, entities must submit the following

- A completed Instructor Application (Exhibit B).
  - Which will include information on how the Proposer meets the qualifications in section 2.
- Exhibit C: Pricing
- Exhibit D: Certifications, fully completed.

#### 3.02 Submittal Location:

Completed Submittals may be mailed, e-mailed or faxed to the following:

Oregon State University, Procurement, Contracts and Materials Management (PCMM)

Attn: Jennifer Koehne

644 SW 13<sup>th</sup> Street

Corvallis, Oregon 97333

Fax: (541) 737-2170

Telephone: (541) 737-7353

E-mail: [jennifer.koehne@oregonstate.edu](mailto:jennifer.koehne@oregonstate.edu)

#### 3.03 Review

Procurement and Contract Services shall review entities submittals to determine if the qualifications set forth in the Request for Qualifications have been met. If the entity meets the qualifications, Procurement and Contract Services will send a letter of acceptance as a participant into the Qualified Pool. If the entity does not meet the qualifications, Procurement and Contract Services will send a letter of rejection including the grounds for rejection and a statement of the appeal rights and deadlines pursuant to OSU Standard 580-061-0130. Acceptance into the Qualified Pool does not entitle the participant to the award of a Contract.

#### 3.04 Selection of Contractors from Qualified Pools.

OSU departments may use a Qualified Pool to make direct appointments, obtain quotes, conduct interviews or request presentations depending on the nature and requirements of the departmental project.

#### 3.05 Termination.

Procurement and Contract Services may discontinue or terminate a Qualified Pool at any time by giving notice to all participants in the Qualified Pool.

### **4.0 INSTRUCTIONS**

#### 4.01 Provisions and Requirements:

This Request for Qualifications and resulting contract(s) are subject to the provisions and requirements of the applicable Oregon Revised Statutes, the applicable Attorney General's Model Public Contract Rules, Oregon Administrative Rules and Oregon State University Standards.

#### 4.02 Right to Reject:

OSU reserves the right to reject any submittal or to reject all submittals at any time prior to OSU's execution of a Contract if it is determined to be in the best interest of OSU to do so.

#### 4.03 Change or Modification/Addenda:

Any change or modification will be in the form of an addenda. Only documents issued as addenda by the OSU Procurement and Contract Services (PaCS) Department serve to change the RFQu in any way. No other direction received, written or verbal, serves to change the RFQu. Note: if you have received a RFQu you should consult the OSU Procurement and Contract Services Department to assure that you have not missed any addenda announcements. Addenda are not required to be returned, however, prospective participants are responsible to make themselves aware of, obtain and incorporate any changes made in any addenda issued. Failure to do so may cause the submittal to be rejected.

#### 4.04 Preparation and Submission:

Submittals shall be prepared in ink and shall be signed by an authorized representative.

#### 4.05 Withdrawal:

Submittals may be withdrawn in writing on company letterhead signed by an authorized representative and received by PaCS prior to contract issuance. Submittals may also be withdrawn in person prior to contract issuance upon presentation of appropriate identification.

#### 4.06 Agreement to Requirements, Terms and Conditions:

By submission, Entities agree to all requirements, terms and conditions contained in the Request for Qualifications.

#### 4.07 Preparation Costs:

OSU shall not be liable for any costs incurred in the preparation of submittals and any subsequent presentations or negotiations.

#### 4.08 Investigation of References:

OSU reserves the right to investigate the references and the past performance of any Entity with respect to its successful performance of similar services and compliance with specifications and contractual obligations. OSU reserves the right to consider past performance, historical information and fact, whether gained from the Entities submittal, question and answer conference, references, OSU or any other source in the evaluation process.

#### 4.09 Notice to Proceed:

Any award of a Contract resulting from this Request for Qualification will be made only by written authorization from OSU.

**EXHIBIT A - CONTRACT**

The following Contract is applicable to this Request for Qualification.

**OREGON STATE UNIVERSITY  
PERSONAL/PROFESSIONAL SERVICES CONTRACT (PPSC)**

Department Contract # \_\_\_\_\_

This Contract is entered into by and between Oregon State University (OSU/Institution) for its Professional and Continuing Education (PACE) (Department) and \_\_\_\_\_ (Contractor).

Whereas OSU has need of the services which Contractor is competent to provide; now therefore, in consideration of the sum not to exceed \$ \_\_\_\_\_ to be paid at the rate of \$ \_\_\_\_\_ /hour to Contractor by OSU, Contractor agrees to perform between date of last signature and \_\_\_\_\_, inclusive, the following personal and/or professional services:

Statement of Work described in Attachment B. Selection of Contractor was performed in accordance with DLxxxxxxRFQu.

Contractor shall not begin work until the Contract is signed by all parties listed below. Unless otherwise specified herein, OSU shall pay only for work performed. Contractor shall submit detailed invoice(s) for work performed to Department for payment. Invoices are paid according the OSU's standard payment terms which are Net 30 days from receipt of correct invoice.

The following attachments are incorporated by this reference and made a part of this contract: Attachment A, OSU Standard Contract Provisions and ☒ Attachment B; SOW ☒ Attachment C; Pricing ☐ Other Attachments \_\_\_\_\_, \_\_\_\_\_.

INSURANCE: the minimum limit is \$ 1M

Type required: ☒ CGL ☐ AUTO ☐ Professional

**THIS CONTRACT SHALL BECOME EFFECTIVE AND BINDING UPON LAST SIGNATURE BY AUTHORIZED REPRESENTATIVES OF THE PARTIES AS PROVIDED HEREIN.**

**OSU****CONTRACTOR**

\_\_\_\_\_  
OSU Department Head Date  
(Typed Name):

\_\_\_\_\_  
Signature Date  
Typed Name:  
Address:

Phone:

\_\_\_\_\_  
OSU Contract Officer Date

Banner Vendor ID No.:  
U.S. Tax Identification No.:  
Contractor is a: (Check One)  
☐ Resident U.S. citizen  
☐ Resident non-U.S. citizen (Green Card Holder)  
☐ Non-U.S. citizen  
☐ Partnership  
☐ Corporation  
☐ Contractor is also a minority group member

OSU VENDOR NO.	FORM PREPARED BY	PREPARER'S ADDRESS	DATE
INDEX CODE	ACCOUNT CODE	ACTIVITY CODE	PAYMENT AMOUNT

All payments and reimbursements made on this contract will be 1099-misc. reportable.

**ATTACHMENT A**  
**OREGON STATE UNIVERSITY STANDARD PERSONAL/PROFESSIONAL SERVICES CONTRACT PROVISIONS**

**ACCESS TO RECORDS.** Contractor shall maintain books, records, documents, and other evidence and accounting procedures and practices sufficient to reflect properly all costs of whatever nature claimed to have been incurred and anticipated to be incurred in the performance of this Contract. OSU and the federal government and their respective duly authorized representatives shall have access to the books, documents, papers, and records of Contractor which are directly pertinent to this Contract for the purpose of making audit, examination, excerpts, and transcripts. Such books and records shall be maintained by Contractor for three years from the date of contract expiration unless a shorter period is authorized in writing. Contractor is responsible for any audit discrepancies involving deviation from the terms of this Contract and for any commitments or expenditures in excess of amounts authorized by Institution.

**ASSIGNMENT.** Contractor shall not assign or transfer its interest nor delegate its obligation in this Contract without the express written consent of the Institution.

**AVAILABILITY OF FUNDS.** Institution certifies that sufficient funds are available and authorized for expenditure to finance costs of this Contract within its current biennial appropriation or expenditure limitation, provided, however, that continuation of the Contract, or any extension, after the end of the fiscal period in which it is written, is contingent upon a new appropriation or limitation for each succeeding fiscal period for the purpose of this Contract.

**CAPTIONS.** The captions or headings in this Contract are for convenience only and in no way define, limit, or describe the scope or intent of any provisions of this Contract.

**COMPLIANCE WITH APPLICABLE LAW.** Contractor agrees to comply with all federal, state, county, and local laws, ordinances, and regulations applicable to the work to be done under this Contract. Contractor specifically agrees to comply with all applicable requirements of federal and state civil rights and rehabilitation statutes, rules, and regulations. Contractor also shall comply with the Americans with Disabilities Act of 1990 (Pub L No. 101-336), ORS 659.425, and all regulations and administrative rules established pursuant to those laws. Failure or neglect on the part of Contractor to comply with any or all such laws, ordinances, rules, and regulations shall not relieve Contractor of these obligations nor of the requirements of this Contract. Contractor further agrees to make payments promptly when due, to all persons supplying to such Contractor, labor or materials for the prosecution of the work provided in this Contract; pay all contributions or amounts due the Industrial Accident Fund from such contractor incurred in the performance of this Contract; not permit any lien or claim to be filed or prosecuted against the state on account of any labor or material furnished; pay to the Department of Revenue all sums withheld from employees pursuant to ORS 316.167. If Contractor fails or refuses to make any such payments required herein, the appropriate Institution official may pay such claim to such payment. Any payment of a claim in the manner authorized in this section shall not relieve the Contractor or Contractor's surety from obligation with respect to any unpaid claims.

**CONFLICT OF INTEREST.** Contractor covenants that it presently has no interest and shall not acquire any interest, direct or indirect, which would conflict in any manner or degree with the performance of its services hereunder. Contractor further covenants that in the performance of this Contract no person having any such interest shall be employed.

**DUAL PAYMENT.** Contractor shall not be compensated for work performed under this Contract from any other entity of the State of Oregon.

**EXECUTION AND COUNTERPARTS.** This Contract may be executed in several counterparts, each of which shall be an original, all of which shall constitute but one and the same instrument.

**GOVERNING LAW.** This Contract shall be governed and construed in accordance with the laws of the State of Oregon. Any claim, action, or suit between Institution and Contractor that arises out of or relates to performance of this Contract shall be brought and conducted solely and exclusively within the Circuit Court for Benton County, for the State of Oregon. Provided, however, that if any such claim, action, or suit may be brought only in a federal forum, it shall be brought and conducted solely and exclusively within the United States District Court for the District of Oregon.

**HAZARD COMMUNICATION.** Contractor shall notify Institution prior to using products containing hazardous chemicals to which Institution employees may be exposed. Products containing hazardous chemicals are those products defined by Oregon Administrative Rules, Chapter 437. Upon Institution's request, Contractor shall immediately provide Material Safety Data Sheets, as required by OAR 437-155-025, for the products subject to this provision.

**INDEMNITY, RESPONSIBILITY FOR DAMAGES.** Contractor shall be responsible for all damage to property, injury to persons, and loss, expense, inconvenience, and delay which may be caused by, or result from, the conduct of work under this contract, or from any act, omission, or neglect of contractor, its subcontractors, or employees. Contractor shall save, defend, indemnify, and hold harmless OSU and its officers, board members, employees, and agents from all claims, suits, and actions of any nature resulting from or arising out of the activities or omissions of Contractor or its subcontractors, officers, agents, or employees acting under this contract.

**INDEPENDENT CONTRACTOR STATUS.** The service(s) to be rendered under this Contract are those of an independent contractor. Contractor is not to be considered an agent or employee of Institution for any purpose, and neither Contractor nor any of Contractor's agents or employees are entitled to any of the benefits that Institution provides for its employees. Contractor will be solely and entirely responsible for its acts and for the acts of its agents or employees during the performance of this Contract. If Contractor is providing personal services as an **individual**, (a) Contractor: (1) Is engaged as an independent contractor and will be responsible for any Federal or State taxes applicable to this payment; (2) Will not be eligible for any Federal Social Security, State Workers' Compensation, unemployment insurance, or Public Employees Retirement System benefits from this Contract payment; (3) Is not an officer, employee, or agent of the State as these terms are used in ORS 30.265 and will not be under the direction and control of Institution; (4) Is not currently employed by the Federal Government and the amount charged does not exceed his normal charge for the type of service provided if payment is to be charged against Federal funds; (5) Is not a member of the Oregon Public Employees Retirement System; or (6) if a contributing member of the Oregon Public Employees Retirement System for which contributions to the retirement system must be withheld, Contractor's contribution to the retirement system will be withheld and a corresponding Institution contribution made; and (7) Must furnish Form IRS Form 8233 in duplicate with this Contract if Contractor is a non-resident alien and claims exemption from Federal Withholding tax.

**INSURANCE.** Contractor shall secure at its own expense and keep in effect during the term of this Contract general liability insurance. Insurance policies, which cannot be excess to a self-insurance program, are to be issued by an insurance company authorized to do business in the State of Oregon. OSU and its officers, board members, employees, and agents shall be included as additional insured in said insurance policy. If any of the liability insurance is arranged on a "claims made" basis, "tail" coverage will be required at the completion of this Contract for a duration of 24 months.

**NOTICES AND REPRESENTATIVES.** All notices, certificates, or communications shall be delivered or mailed postage prepaid to the parties at their respective places of business as identified in the signature block of this Contract, unless otherwise designated in writing. Copies of such correspondence shall also be sent to all other Contract signatories.

**OVERDUE PAYMENTS.** Any charges claimed by the Contractor for payment of an overdue amount shall be in accordance with the provisions of ORS 293.462.

**OWNERSHIP OF WORK PRODUCT.** All work products or any form of property originated or prepared by Contractor which result from this Contract are the exclusive property of Institution.

**SEVERABILITY.** If any term or provision of this Contract is declared by a court of competent jurisdiction to be illegal or in conflict with any law, the validity of the remaining terms and provisions shall not be affected, and the rights and obligations of the parties shall be construed and enforced as if the Contract did not contain the particular term or provision held to be invalid.

**SUBCONTRACTS AND ASSIGNMENTS.** Contractor shall not enter into any subcontracts for any of the work scheduled under this Contract, or assign or transfer any of its interest in this Contract, without obtaining prior written approval from the Institution.

**SUCCESSORS IN INTEREST.** The provisions of this Contract shall be binding upon and shall inure to the benefit of the parties hereto, and their respective successors and assigns.

**TERMINATIONS.** This Contract may be terminated at any time by mutual consent of both parties, or by either party upon thirty (30) days' notice in writing and delivered by certified mail or in person to the other party. In addition, the Institution may terminate this Contract effective upon delivery of written notice to Contractor, or at such later date as may be established by the Institution, if (a) Federal or state regulations or guidelines are modified, changed, or interpreted in such a way that the services are no longer allowable or appropriate for purchase under this Contract; or (b) Any license or certificate required by law or regulation to be held by the Contractor to provide the services required by this Contract is for any reason denied, revoked, or not renewed. This Contract may also be terminated by Institution for default (including breach of contract) if (a) Contractor fails to provide services or materials called for by this Contract within the time specified; or (b) Contractor fails to perform any of the other provisions of this Contract, or so fails to pursue the work as to endanger performance of this Contract in accordance with its terms, and after receipt of written notice from Institution, fails to correct such failures within ten days. The rights and remedies of Institution provided in the above clause related to defaults (including breach of contract) by Contractor shall not be exclusive and are in addition to any other rights and remedies provided by law or under this Contract.

**TERMINATION DUE TO NONAPPROPRIATION OF FUNDS.** If sufficient funds are not provided in future legislatively approved budgets of Institution (or from applicable Federal, state, or other sources) to permit Institution in the exercise of its reasonable administrative discretion to continue this Contract, or if Institution or program for which this Contract was executed is abolished, the Institution may terminate this Contract without further liability by giving Contractor not less than thirty (30) days notice. In determining the availability of funds from the Oregon Legislature for this Contract, Institution may use the budget adopted for it by the Joint Ways and Means Committee of the Oregon Legislative Assembly.

**FOREIGN CONTRACTOR.** If Contractor is not domiciled in or registered to do business in the State of Oregon, Contractor shall promptly provide to the Oregon Department of Revenue and the Secretary of State, Corporation Division, all information required by those agencies relative to this Contract. Contractor shall demonstrate its legal capacity to perform these services in the State of Oregon prior to entering into this Contract.

**FORCE MAJEURE.** Neither Institution nor Contractor shall be held responsible for delay or default caused by fire, riot, acts of God, or war where such cause was beyond, respectively, Institution's or Contractor's reasonable control. Contractor shall, however, make all reasonable efforts to remove or eliminate such a cause of delay or default and shall, upon the cessation of the cause, diligently pursue performance of its obligations under this Contract.

**WAIVER.** The failure of Institution to enforce any provision of this Contract shall not constitute a waiver by Institution of that or any other provision.

**APPROVALS.** In some instances, another state agency may be required to approve this Contract before any work may commence under this Contract.

**RECYCLED PRODUCTS:** Contractors will use recycled products, as defined in ORS 279A.010(1)(ii), to the maximum extent economically feasible in the performance of the Contract.

**WORKERS' COMPENSATION.** All employers, including Contractor, that employ subject workers who work under this Contract in the State of Oregon shall comply with ORS 656.017 and provide the required workers' compensation coverage, unless such employers are exempt under ORS 656.126. Contractor shall ensure that each of its subcontractors complies with these requirements.

**MERGER. THIS CONTRACT CONSTITUTES THE ENTIRE AGREEMENT BETWEEN THE PARTIES. THERE ARE NO UNDERSTANDINGS, AGREEMENTS, OR REPRESENTATIONS, ORAL OR WRITTEN, NOT SPECIFIED HEREIN REGARDING THIS CONTRACT. NO AMENDMENT, CONSENT, OR WAIVER OF TERMS OF THIS CONTRACT SHALL BIND EITHER PARTY UNLESS IN WRITING AND SIGNED BY ALL PARTIES. ANY SUCH AMENDMENT, CONSENT, OR WAIVER SHALL BE EFFECTIVE ONLY IN THE SPECIFIC INSTANCE AND FOR THE SPECIFIC PURPOSE GIVEN. CONTRACTOR, BY THE SIGNATURE HERETO OF ITS AUTHORIZED REPRESENTATIVE, ACKNOWLEDGES HAVING READ AND UNDERSTOOD THE CONTRACT AND CONTRACTOR AGREES TO BE BOUND BY ITS TERMS AND CONDITIONS.**

## Attachment B-1: Online Courses

### Statement of Work and Additional Terms/Conditions

#### 1.01 Statement of Work

PACE is requesting the vendor follow the OSU Best Practices for Online Course Design course specifications for each course:

General Standard	Detailed Standard
Provide Course Overview and Introduction *Navigation	<ul style="list-style-type: none"> <li>Course opens to announcement area <input type="checkbox"/></li> <li>Course structured in intuitive sections (weeks, units, etc.), with all materials for each section housed within that section <input type="checkbox"/></li> <li>Intuitive and logical navigational structures are present <input type="checkbox"/></li> <li>All OSU-required syllabus information is present (instructor's name, OSU email address, contact information, grading policies, etc.) <input type="checkbox"/></li> <li>A course schedule with due dates is provided (within the syllabus or as a separate document) <input type="checkbox"/></li> <li>Syllabus also includes information for online students, such as netiquette requirements and technical support info.</li> </ul>
Develop Learning Objectives	<ul style="list-style-type: none"> <li>Course outcomes are measurable and observable (avoiding ambiguous verbs such as "understand," or "comprehend") <input type="checkbox"/></li> <li>Weekly learning objectives and a weekly introduction are provided</li> </ul>
Develop Clear Assessment and Measurement Guidelines and Tools	<ul style="list-style-type: none"> <li>Grading policies are stated clearly (such as stating grading criteria or supplying a rubric) <input type="checkbox"/></li> <li>Assessments (assignments, exams, projects, discussions, etc.) are aligned with course outcomes, weekly objectives, content, and cognitive level</li> <li>All assessments are collected within Canvas <input type="checkbox"/></li> <li>If proctored exams are desired, proctoring requirements are <input type="checkbox"/> established with the testing coordinator</li> </ul>
Create Instructional Materials	<ul style="list-style-type: none"> <li>Instructional materials are in alignment with the course outcomes and weekly objectives <input type="checkbox"/></li> <li>Instructional materials are appropriately cited <input type="checkbox"/></li> <li>Copyright permissions for any borrowed images, textual content, film, or <input type="checkbox"/> other source materials have been requested; in cases where permissions are denied or when fees are not feasible, the source materials in question are removed. Videos are not streamed until permission is granted. Instructional materials are presented in formats demonstrating best practices for distance education <input type="checkbox"/></li> <li>Appeal to a variety of learning preferences (readings, audio, visual, multimedia, etc.) <input type="checkbox"/></li> <li>Lecture content is brief (&lt;20 mins.) <input type="checkbox"/></li> <li>All recordings are designed for PACE students. (no recording of in class material)</li> <li>Audio and visual quality must be clear for all multimedia <input type="checkbox"/></li> </ul>



	<ul style="list-style-type: none"> <li>Lectures are <b>not</b> required; it is fine to use existing materials such as links to open education resources, readings, activities, etc.</li> </ul>
Create Opportunities for Learner Interaction and Engagement	<ul style="list-style-type: none"> <li>Learning activities are aligned with course outcomes and weekly learning objectives <input type="checkbox"/></li> <li>Opportunities for active learning are provided <input type="checkbox"/></li> <li>The instructor's response times for communications and grading are clearly stated <input type="checkbox"/></li> <li>Three forms of interaction are present in the course: <ul style="list-style-type: none"> <li>Student/content (such as discussion board, readings, video, research projects)</li> <li>Student/instructor (such as discussion board, response to assignments, inclusion of a general discussion forum the instructor will facilitate)</li> <li>Student/student (such as discussion board, group projects, peer reviewed assignments, blogs)</li> </ul> </li> </ul>
Utilize Course Technology	<ul style="list-style-type: none"> <li>Appropriate tools are used for their intended purpose (assignment tool for homework, exam tool for exams, rather than having students email assignments, for example) <input type="checkbox"/></li> <li>Tools outside of Canvas are used in ways that comply with FERPA regulations and student completion of work is logged within Canvas <input type="checkbox"/></li> <li>Grades (if applicable) are communicated to students using the Canvas grading center <input type="checkbox"/></li> <li>Links to outside resources are functional <input type="checkbox"/></li> </ul>
Learner Support Awareness	<ul style="list-style-type: none"> <li>The Important Links page provided by PACE is included in the Course Information area (<a href="http://oregonstate.edu/instruct/dce/importantlinks.html">http://oregonstate.edu/instruct/dce/importantlinks.html</a>) <input type="checkbox"/></li> <li>Library course guides are used, when appropriate to the course</li> </ul>
Create Courses with Accessibility in Mind	<ul style="list-style-type: none"> <li>Simple font and color schemes are used <input type="checkbox"/></li> <li>Visuals, such as PowerPoint presentations, contain sufficient contrast from background color to foreground text <input type="checkbox"/></li> <li>Audio and video materials have transcripts available <input type="checkbox"/></li> <li>Documents are posted in accessible format (such as a PDF file with document structure tags)</li> </ul>

➤ General Course Timeframe:

1. Scoping Meetings Complete — 4 months prior to course
2. Final Syllabus Received — 3 months prior to course
3. Modules Received from Instructor — 1-2 months prior to course
4. Final Modules Received from Instructor — At least 3 weeks before course goes live

The parties understand that as the project develops, related services not listed above may be required to achieve the parties' objectives. Any modifications to the Contract, including the Scope of Work, shall be made in writing and by mutual consent of the parties.

## Attachment B-2: Onsite Courses

### Statement of Work and Additional Terms/Conditions

#### 1.01 Statement of Work

PACE is requesting the vendor follow the OSU Best Practices for Onsite Course Design course specifications for each course:

General Standard	Detailed Standard
Provide consultation to PACE staff as a Subject Matter Expert (SME) for (a) workshop(s).	<ul style="list-style-type: none"> <li>Participate in any pre-training assessments and preparatory conversations with (client) staff to design and develop the (name of workshop) workshop. Normally, this consists of one needs analysis phone call, but may involve more communication as the specific need would require.</li> </ul>
Develop course outline (syllabus) and develop a customized curriculum for (name of topic) workshop(s).	<ul style="list-style-type: none"> <li>Design and develop a (number of days)-day workshop based on the consultative analysis and agreed upon alignment of course objectives.</li> </ul>
Perform class facilitation and instruction of face-to-face workshop(s) on assigned date.	<ul style="list-style-type: none"> <li>Lead the face-to-face workshop training(s) on the following date(s) in (year): (Month, Date).</li> <li>Troubleshoot all logistical questions and issues the (client name) staff has during the (number of days) face-to-face workshop(s) and report questions and concerns to PACE staff within 24 hours.</li> <li>Send the customized syllabus and curriculum's PPT slides and/handouts to PACE staff 14 days ahead of time for review and to ensure the production, delivery and distribution of materials arrive on time to the training location.</li> <li>Distribute and collect workshop evaluations and return them to PACE staff in (a) pre-paid returned envelope(s) within 72 hours of the workshop conclusion.</li> <li>Encourage higher-level thinking, creativity and performance of the workshop participants.</li> <li>Encourage academic honesty, respect for and among participants, and use empirical analysis of real-world examples to illustrate learning objectives.</li> <li>Understand OSU's commitment to diversity and represent OSU well while teaching.</li> </ul>
Clearly communicate with PACE staff regarding the workshop(s) logistical accommodations needed to ensure the workshop is successfully executed on (Month Day, Year.)	

- General Course Timeframe (please note that depending on the course an instructor teaches, some of the following may not apply based on need and timeline):

1. Scoping Meetings Complete — 4 months prior to course
2. Final Syllabus Received — 3 months prior to course
3. Modules Received from Instructor — 1-2 months prior to course
4. Final Modules Received from Instructor — At least 3 weeks before course

The parties understand that as the project develops, related services not listed above may be required to achieve the parties' objectives. Any modifications to the Contract, including the Scope of Work, shall be made in writing and by mutual consent of the parties.

#### 1.02 Confidentiality

Contractor may be required to have staff assigned to this Contract sign Confidentiality Agreements in order to protect confidential information which the Contractor may obtain in performance of this Contract.



## Biographical History

Date \_\_\_\_\_

Home Address \_\_\_\_\_  
Street City State Zip

List Areas of Teaching Expertise:

Please list experience delivering college courses, corporate training and other presentations:

List the universities, colleges, technical or professional schools that you have attended. Include degrees obtained and/or in progress and approximate completion date.

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List professional designations, certifications, and licenses or other related training or background:

1. \_\_\_\_\_
2. \_\_\_\_\_

Employment history and/or experience related to instructional topic:

Company/Firm	Position	Dates
1. _____	_____	_____
2. _____	_____	_____
3. _____	_____	_____
4. _____	_____	_____

List publications, professional affiliations, honors, and awards:

Explain how your professional affiliations/experiences relate to this teaching area:

Please list a minimum of three (3) references who are familiar with your academic and professional background, qualifications for teaching, and field of specialization. Make sure to include all information.

1. Full Name:	Title:		
Company Name:			
Address:	City:	State:	Zip:
Bus. No.:	Fax :	E---Mail:	
2. Full Name:	Title:		
Company Name:			
Address:	City:	State:	Zip:
Bus. No.:	Fax :	E---Mail:	
3. Full Name:	Title:		
Company Name:			
Address:	City:	State:	Zip:
Bus. No.:	Fax :	E---Mail:	
4. Full Name:	Title:		
Company Name:			
Address:	City:	State:	Zip:
Bus. No.:	Fax :	E---Mail:	
5. Full Name:	Title:		
Company Name:			
Address:	City:	State:	Zip:
Bus. No.:	Fax :	E---Mail:	

List the name of the school, college or university where you currently teach. Include course titles. Reply "None" if not applicable.

1. \_\_\_\_\_
2. \_\_\_\_\_

Are you a registered OSU Student?	Yes _____	No _____
If yes, are you employed by the OSU?	Yes _____	No _____
Are you related to anyone at OSU?	Yes _____	No _____

Note: You will need to provide documentation of U.S. employment eligibility when hired. Your signature below verifies that all statements on this form are correct:

*David Vasquez*

**Signature**

**Date**

Title \_\_\_\_\_ If OSU, Employee Number \_\_\_\_\_

If OSU, Percent of Time: \_\_\_\_\_ If OSU, Home Department \_\_\_\_\_

**PACE, 4943 The Valley Library Corvallis, OR 97331 FAX: (541) 737---2734**

## **Oregon State University, Professional and Continuing Education**

A brief paragraph (80 words maximum) about your current or prior working experience that would prove your expertise to teach the course.

### **Sample instructor biographies**

John Q. Moseley, M.S., MCSE, is the director of information technology for the City of Corvallis. He has more than a decade of IT experience dealing with object---oriented technologies, Java programming, networking, and applications development. He has published extensively in the areas of software licensing, intellectual capital, and other information technology issues. He is currently chapter president of the Benton County Software Society. He has taught at OSU's Professional and Continuing Education for more than 10 years.

Jane W. Williams, M.S., Ph.D. candidate at Oregon State University, managing partner for The Capital Group in Corvallis. She has worked in the information systems field for the past 20 years as project manager, software engineer, and director of M.I.S. Her expertise includes programming, scripting languages, and operating systems. She is a frequent lecturer at national industry and professional association conferences and is a contributing editor for several technical journals.

#### **Helpful Hint:**

Please complete these sentences:

"I am qualified to teach this course because ... "

"Potential students may be interested to know that I am/have been ... "

**EXHIBIT C - PRICING**

Budget/financial proposal detailing all expenses related to carrying out this contract

ITEM	DESCRIPTION OF SERVICES	PRICE
	Professional Fee	
	Per Student Fee	
	Contractor Travel	
	Other Fees as appropriate:	
	<b>TOTAL PRICE</b>	<b>\$</b>

## EXHIBIT D - CERTIFICATIONS

By signature on this certification the undersigned certifies that they are authorized to act on behalf of the Proposer and that under penalty of perjury the undersigned will comply with the following:

### SECTION I. OREGON TAX LAWS

The undersigned hereby certifies under penalty of perjury that the undersigned is authorized to act on behalf of Proposer and that Proposer is, to the best of the undersigned's knowledge, not in violation of any Oregon Tax Laws. For purposes of this certification, "Oregon Tax Laws" means a state tax imposed by ORS 320.005 to 320.150 and 403.200 to 403.250 and ORS chapters 118, 314, 316, 317, 318, 321 and 323 and the elderly rental assistance program under ORS 310.630 to 310.706 and local taxes administered by the Department of Revenue under ORS 305.620.

### SECTION II. AFFIRMATIVE ACTION

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

### SECTION III. COMPLIANCE WITH SOLICITATION

The undersigned agrees and certifies that they:

1. Have read, fully understands and agrees to be bound by the Request for Proposal and all Exhibits and Addenda to the Request for Proposal; and
2. Are an authorized representative of the Proposer, that the information provided is true and accurate, and that providing incorrect or incomplete information may be cause for rejection of the Proposal or Contract termination; and
3. Will furnish the designated item(s) and/or service(s) in accordance with the Request for Proposal and the Contract; and
4. Has provided a correct Federal Employer Identification Number or Social Security Number with the Proposal.

Authorized Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Name (Type or Print): \_\_\_\_\_

Telephone: (\_\_\_\_) \_\_\_\_\_

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

Fax: (\_\_\_\_) \_\_\_\_\_

FEIN ID# or SSN# (required): \_\_\_\_\_

Email: \_\_\_\_\_

Construction Contractors Board (CCB) License Number (if applicable): \_\_\_\_\_

Business Designation (check one):

☐ Corporation    ☐ Partnership    ☐ LLC    ☐ Sole Proprietorship    ☐ Non-Profit

Minority, Women & Emerging Small Business (MWESB) Certified Firm: ☐ Yes ☐ No

If yes, Minority, Women & Emerging Small Business (MWESB) Certification Number: \_\_\_\_\_