

Scott Bellows
Dispute Solutions LLC
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September 6, 2016

Timothy J. Jenks
State Procurement Analyst
Department of Administrative Services
State of Oregon
1225 Ferry Street SE U140
Salem, OR 97301-4285

By hand delivery

Re: Alternative Dispute Resolution Services, DASPS-2599-16

Dear Mr. Jenks,

Enclosed please find Dispute Solutions LLC's response to the above-referenced Request for Proposals. My signature below, as well as on Exhibit E ("Proposer Certification Sheet"), confirms Dispute Solutions LLC's commitment to be bound by the information contained herein.

Best regards,

A handwritten signature in black ink, appearing to read "Scott Bellows", written in a cursive style.

Scott Bellows

ATTACHMENT C

STATEMENT OF QUALIFICATIONS (SOQ)

(Revised Pursuant to Addendum No. 1, August 12, 2016)

Section 1: ADR Provider Contact Information & Languages			
Last Name	Bellows	First Name	Scott
Company Name	Dispute Solutions LLC		
Business Address	P.O. Box 23146		
City	Portland	State	OR
Zip Code	97281	Phone 1	(503) 345-9343
E-mail	scott@disputesolutions.org		
Web Site	www.disputesolutions.org		
Languages Spoken	English, Spanish	Fax #	(503) 345-9343

Section 2: Provider Overview

The following Section provides a brief overview of the provider's experience and qualifications:

I am a mediator, attorney, facilitator, trainer, and writer with experience helping prevent and resolve conflicts of all kinds. My clients include courts, private parties, attorneys, school districts, and state and federal agencies (including the Oregon Department of Education, Oregon Department of Forestry, Oregon Department of Transportation, U.S. Forest Service, and U.S. Postal Service). I have been a member of Oregon's Department of Justice mediator roster for the past five years in the areas of general and workplace mediation, litigation settlement, public involvement, and large group facilitation, and also serve on the State of Washington's similar roster.

My mediation practice is broad, and includes special education and disability law; construction and transportation law; high-emotion interpersonal disputes, including workplace, employment, conservatorship, medical malpractice, environmental disputes, and similar matters. If I have an emphasis or area of expertise, it's the mediation and facilitation of complex, legal, multiparty, and high-emotion disputes. Prior to limiting my practice to work only as a "neutral" in 2002, I practiced litigation (including jury trials and criminal prosecution) for fifteen years, participating in hundreds of mediations and settlement conferences. My areas of practice as a litigator included construction law, employment and disability law, and insurance coverage.

My training includes the basic mediation curriculum and advanced mediation training from numerous providers. I also am a mediation trainer myself, having conducted or co-taught trainings for the Oregon Mediation Association, Oregon Patient Safety Commission, Oregon Construction Contractors Board, Community Associations Institute, and others.

Finally, I am conversationally fluent in Spanish (I once worked as a Spanish-language recruiter and trainer for the U.S. Census), and have experience mediating successfully using interpreters.

Section 3 Services Offered and Rate

Type of Service Key Person Desires to Offer & is Qualified to Offer	ADR Provider Billing Rate per hour	Support Staff Billing Rate Per Hour (Rate/Title)	The following items, if checked, are expenses that may be passed through at cost to the agency (See Price Agreement for details):
<input checked="" type="checkbox"/> 1. A <u>Mediation General Practitioner</u> is an impartial third party who assists two or more parties in reaching a mutually acceptable resolution to a controversy. These Practitioners have broad mediation experience and skills and are able to adapt mediation to a wide variety of circumstances, including workplace disputes.	145.00	00.00 to 90.00 (range) Administrative Assistant	<input type="checkbox"/> Copy/print charges <input type="checkbox"/> Facility Use/ Rental Fees
<input checked="" type="checkbox"/> 2. A <u>Facilitation General Practitioner</u> is an expert at helping large groups work effectively towards a desired objective. These Practitioners have sufficiently broad experience and skills so as to be able to design and facilitate a large group process to achieve variety of goals or objectives.	145.00	00.00 to 90.00 (range) Administrative Assistant	<input type="checkbox"/> Copy/print charges <input type="checkbox"/> Facility Use/Rental Fees
<input type="checkbox"/> 3. A <u>Public Policy Facilitator</u> is an expert at helping governmental entities and diverse stakeholders reach agreement on controversial public policies or public projects, often within a complex legal, political or regulatory context. These providers are experienced at assessing, designing, convening and facilitating collaborative processes.		Assistant	<input type="checkbox"/> Copy/print charges <input type="checkbox"/> Facility Use/Rental Fees
<input type="checkbox"/> 4. A <u>Public Involvement Practitioner</u> is an expert at helping governmental entities engage the public on public issues or projects. These providers are able to design and implement an appropriate public involvement process from projects that seek to inform or educate the public to projects that allow for greater public involvement via consultation or collaboration.	00.00	00.00 Staff Title 00.00 Staff Title 00.00 Staff Title 00.00 Staff Title 00.00 Staff Title 00.00 Staff Title 00.00 Staff Title 00.00 Staff Title	<input type="checkbox"/> Copy/print charges <input type="checkbox"/> Facility rental fees <input type="checkbox"/> Mail or bulk email fees <input type="checkbox"/> Telephone charges <input type="checkbox"/> Website hosting, online software or online services fees <input type="checkbox"/> Video production services <input type="checkbox"/> Other Subcontractors

Section 4A: Does the Provider charge travel expenses to provide services in your area?

County or County Area	Available to work in this area without charging travel expenses.	Available to work in this area but will charge travel expenses
1 Clatsop, Columbia, Tillamook – Counties	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2 Washington, Multnomah – Counties	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3 Polk, Marion, Yamhill – Counties	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4 Lincoln, Benton, Linn – Counties	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5 Lane – County	<input type="checkbox"/>	<input checked="" type="checkbox"/>
6 Douglas – County	<input type="checkbox"/>	<input checked="" type="checkbox"/>
7 Coos, Curry – Counties	<input type="checkbox"/>	<input checked="" type="checkbox"/>
8 Josephine, Jackson – Counties	<input type="checkbox"/>	<input checked="" type="checkbox"/>
9 Hood River, Wasco, Sherman, Gilliam, Wheeler	<input type="checkbox"/>	<input checked="" type="checkbox"/>
10 Jefferson, Crook, Deschutes – Counties	<input type="checkbox"/>	<input checked="" type="checkbox"/>
11 Lake, Klamath – Counties	<input type="checkbox"/>	<input checked="" type="checkbox"/>
12 Morrow, Umatilla – Counties	<input type="checkbox"/>	<input checked="" type="checkbox"/>
13 Wallowa, Union, Grant, Baker – Counties	<input type="checkbox"/>	<input checked="" type="checkbox"/>
14 Harney, Malheur – Counties	<input type="checkbox"/>	<input checked="" type="checkbox"/>
15 Clackamas – County	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Section 4B: Hourly Travel Charges. *If, in addition to allowable travel expenses, the Provider will charge for travel time and the travel time of administrative assistants or staff, or both, the hourly travel rate for Proposer and each of Proposer's administrative assistant and staff must be identified here:*

Hourly rate for local travel is \$145. Travel rate for longer trips may be negotiable (i.e., reduced for longer trips when necessary to provide affordable services).

Section 5: Standards the Provider Subscribes to and Licenses Held

- ☒ Oregon Mediation Association Core Standards of Mediation Practice, April 23, 2005
(<http://www.mediate.com/oma/pg61.cfm>)
- ☒ Association for Conflict Resolution, Model Standards of Conduct for Mediators, 2005 revisions.
http://www.imis100us2.com/acr/ACR/Resources/Model_Standards/ACR/Resources/Model_Standards.aspx?hkey=315fc2bd-2cac-422b-82bf-b3160b6a1b08
- ☒ Model Standards of Practice for Family and Divorce Mediation
http://www.imis100us2.com/acr/ACR/Resources/Model_Standards/ACR/Resources/Model_Standards.aspx?hkey=315fc2bd-2cac-422b-82bf-b3160b6a1b08
- ☐ International Association for Public Participation (IAP2), Code of Ethics for Public Participation Practitioners (See
<http://www.iap2.org/displaycommon.cfm?an=1&subarticlenbr=8>)
- ☐ Other professional standards that the provider subscribes to:
- ☒ Oregon State Bar # **93486**
- ☒ Other professional licenses: **California State Bar (not currently active)**

Section #6: Provider's Specialized Areas of Expertise		
Area of Expertise	Sub Specialty	Areas of expertise
Business and Finance	General	<input checked="" type="checkbox"/>
	Investment and Finance	<input type="checkbox"/>
	Patents or Intellectual Property Rights	<input type="checkbox"/>
Civil Rights	Civil Rights	<input checked="" type="checkbox"/>
Consumer	All Types, Consumer-Merchant Disputes	<input checked="" type="checkbox"/>
	Assistive Technologies	<input checked="" type="checkbox"/>
	Vehicle Sales, Service or Repair	<input checked="" type="checkbox"/>
Cultural	Cross Cultural, Ethnicity, or Related Fields	<input checked="" type="checkbox"/>
Education	Education	<input checked="" type="checkbox"/>
	Special Education	<input checked="" type="checkbox"/>
Environmenta	Agricultural Exceptions (goal 2)	<input checked="" type="checkbox"/>
	Agriculture	<input checked="" type="checkbox"/>
	Air, Land and Water Quality	<input checked="" type="checkbox"/>
	Coastal	<input checked="" type="checkbox"/>
	Endangered Species or Wildlife	<input checked="" type="checkbox"/>
	Energy	<input checked="" type="checkbox"/>
	Forestry	<input checked="" type="checkbox"/>
	Hazardous Materials and Environmental	<input checked="" type="checkbox"/>
	Other Natural Resource Related	<input checked="" type="checkbox"/>
	Water Resources, Wetlands	<input checked="" type="checkbox"/>
	Governmental and Regulatory	Government-to-Government (e.g., state-tribal)
Professional Licensing		<input checked="" type="checkbox"/>
Public Utilities		<input type="checkbox"/>
Human Services	Child Dependency and Permanency Planning (Adoption)	<input type="checkbox"/>
	Disability	<input checked="" type="checkbox"/>
	Family Services, including Service Plans	<input type="checkbox"/>
	Health Care	<input checked="" type="checkbox"/>
	Senior Services	<input checked="" type="checkbox"/>
	Social Services	<input type="checkbox"/>
	Vocational Rehabilitation	<input type="checkbox"/>
	Public Assistance - AFS	<input type="checkbox"/>
International	International	<input checked="" type="checkbox"/>
Labor and Employment	Collective Bargaining and Labor	<input type="checkbox"/>
	General Employment and Human Resources	<input checked="" type="checkbox"/>
	Workers' Compensation	<input type="checkbox"/>
	Workplace Interpersonal Disputes	<input checked="" type="checkbox"/>
Torts or Insurance Claims	Torts or Insurance Claims	<input checked="" type="checkbox"/>
Transportation, Housing and Land Use	Construction Industry & Contracts, Civil Engineering	<input checked="" type="checkbox"/>
	Eminent Domain	<input checked="" type="checkbox"/>
	General Planning	<input checked="" type="checkbox"/>
	Growth Management	<input checked="" type="checkbox"/>
	Housing	<input checked="" type="checkbox"/>
	Land Use	<input checked="" type="checkbox"/>
	Railroad	<input checked="" type="checkbox"/>
	Real Property	<input checked="" type="checkbox"/>
	Siting Controversial Projects or Facilities	<input checked="" type="checkbox"/>

Section 7: Relevant Education and Training

Following is a partial list of relevant mediation trainings, with a focus on details of the most recent:

Ongoing: Regular, periodic professional education in mediation, facilitation, public process, etc. through the Oregon Mediation Association, Oregon State Bar Association, National Center on Dispute Resolution in Special Education, Oregon Department of Education, the International Association for Public Participation, and other professional and governmental organizations.

High-Conflict Symposium: Advanced training on management of high-conflict individuals/parties with personality disorders in mediation. (Marion County, Ore. Bar Association/Bill Eddy, LCSW, JD, CFLS; Jan. 9, 2015.)

Probate Mediation Training: Advanced training for court-appointed mediators in probate and conservatorship cases. (Beaverton Dispute Resolution/Clackamas Resolution Services/Oregon State Bar ADR and Elder Law Sections; May 14-15, 2015.)

Early Discussion & Resolution Medical Mediation Training: Advanced training for mediators in adverse outcome/medical malpractice mediators. Both attended and served as trainer and co-facilitator. (Oregon Patient Safety Commission, Oregon Medical Association and Oregon Mediation Association; June 23-24, 2014.)

Mortgage Foreclosure Avoidance Facilitation Training: three-day training in law and conflict dynamics in mortgage foreclosure conflict resolution. Attended and served as workgroup facilitator. (The Collins Center; June 28-30, 2012)

Transformative Mediation/Workplace Mediation Training: multiday training in Transformative Mediation and workplace and employment disputes for U.S. Postal Service REDRESS program roster. (Center for Conflict Transformation and U.S. Postal service; exact dates currently unknown, 2007.)

Advanced Facilitative Mediation Training: facilitative mediation training for Oregon Appellate Settlement Conference Program mediation roster. (Willamette University School of Law Center for Dispute Resolution and Oregon Court of Appeals; exact dates currently unknown, 2005.)

Court-Approved Basic Mediation Training: 40-hour training in facilitative mediation, exceeding minimum requirements for court-annexed mediators. (Neighbor to Neighbor Community Mediation Centers; exact dates currently unknown, 2002.)

Juris Doctor, University of California, Davis. (U.C. Davis King Hall School of Law; 1987)

Community Mediation Training: Facilitative co-mediation training for University-based community mediation program; also served as program administrator. (University of California, Davis; exact dates unknown, 1986.)

Section 8: Relevant Training Conducted by the Provider

Early Discussion & Resolution Medical Mediation Training: Advanced training for mediators in adverse outcome/medical malpractice mediators. (Oregon Patient Safety Commission, Oregon Medical Association and Oregon Mediation Association; June 23-24, 2014.)

Oregon Confederation of School Administrators: Keynote speaker, 2016

National Center on Dispute Resolution in Special Education: featured speaker, 2016

Oregon Mediation Association Annual Conference: featured speaker, 2016

Oregon Mediation Association Annual Conference: speaker, 2007

Administered and trained mediators for University-based community mediation program (1986- 87).

First person authorized by State to teach construction law and dispute resolution components of Master Builder certification program (2000).

Section 9: Workplace Mediation Experience

Approximately 25% of my mediation practice consists of workplace disputes, including both interpersonal conflicts and more formal wrongful termination, discrimination, labor relations, and similar legal or administrative claims (and often hybrids of the two). My workplace/employment clients include the US Postal Service RESOLVE program (on roster since 2006), private employers, courts/attorneys, and Employee Assistance Plans. I have worked with employee disputes ranging from simple disagreements between two workers, to tripartite negotiations among employee/employer/union (each with different needs and goals), to Organizational Development-style initiatives affecting whole offices. Perhaps my favorite workplace mediation was a two-day marathon between two career US Forest Service employees that ended with both employees not only finding peace between themselves, but collaborating excitedly on a presentation to help their coworkers avoid the relationship pitfalls they had fallen into.

My professional experience actually mediating workplace disputes (est. 1,000+ hours) is supplemented by years working as a litigator and arbitrator of employment disputes, including wrongful termination actions in state and federal courts and before the EEOC and state agencies (on behalf of both employees and employers), including some experience with class action and union certification disputes. While my mediation "style" in workplace disputes tends to be facilitative (i.e., when possible I focus less on the law than on what the individuals and organization need to make their relationship work and their workplace succeed), the thousands of hours I have spent as an employment litigator contributes greatly to my understanding of workplace dispute dynamics and allows me to be evaluative when necessary and helpful.

Section 10: Litigation Settlement Related Experience

I spent 15 years practicing as a litigator and trial attorney before embarking on a full-time "neutral" practice in 2002. That practice included construction, business, insurance coverage, product liability, premises liability, government contracts/procurement, and employment disputes, as well as criminal prosecutions. In addition to legal matters I have mediated as a member of this roster for the DOJ and Department of Forestry, I have served as a mediator on court rosters since 1993, and am an active member of the mediation rosters for the Oregon Court of Appeals, U.S. District Court, and numerous Circuit Courts. Although I am strongly inclined to take a facilitative rather than evaluative approach as a mediator when possible (not merely on principle but because hard data and my own experience shows that it can be astoundingly successful), I am willing and able to use different approaches when called for, including caucuses, "shuttle diplomacy" and evaluative approaches (I am an arbitrator as well as a mediator). I also strive to be cost-effective: my hourly rates are among the lowest of the attorneys on this roster.

Section 11: Overall Mediation Experience

I am an attorney who has practiced mediation since 1986, spent 15 years as a litigator, and since 2002 has limited his practice to working solely as a neutral. I take the craft and ethos of mediation very seriously, have sought out advanced training in mediation methodologies to give myself a large "toolbox" to work with. My regular clients include the Oregon Department of Education (special education mediation), U.S. Postal Service (workplace mediation), Oregon Court of Appeals and multiple Circuit Courts (wide variety of legal disputes including family law, business and contract, workplace/employment, etc.), the Oregon Department of Transportation and Department of Forestry; insurance companies, attorneys, and private parties. My practice is extremely varied: I have successfully mediated many cases in Spanish and American Sign Language; across cultures (including Latino, Arabic, and Asian); for parties suffering mental health problems; and across gender and lifestyle boundaries. My practice's subject matter is similarly diverse, ranging from disputes between business partners, to domestic relations disputes, to special education mediations and facilitations for ODE (a large part of my current workload), to workplace conflicts, to disputes within NGOs and churches, to multi-stakeholder public processes.

This SOQ puts great weight on "experience." I have practiced and taught mediation since 1986, was invited to join my first court mediation roster in 1993, and began practicing mediation, facilitation and arbitration full-time in 2002. However, my practice always has been more high-intensity than high-volume: I have spent several thousand hours mediating hundreds of cases, with the time invested in each case varying from 2-3 hours to multiple days, depending on the needs of the client and the situation. When I accept a mediation, I give it my full attention, work extremely hard to understand both the needs, interests and positions of the parties and the legal, factual, educational, financial and other issues that frame the dispute, and commit wholeheartedly to the mediation process. That hard work and intense focus (not arm-twisting) is why, 95% of the time, I am able to help my clients resolve their disputes and, in many cases, move forward productively together.

Section 12: Facilitation Experience

Group facilitation, at least in my practice, is a fascinating hybrid of conflict resolution (especially when it is an offshoot of a complex multiparty dispute) and organizational development/management practice. Because that mix of conflict and collaboration is different in each case, and can vary from moment to moment in any given group, I draw on my mediation expertise, formal and informal training in group process and collaboration, and varied life experiences helping manage groups in critical situations (including everything from churches divided by personal and doctrinal conflicts to mountain rescue units making go-no go decisions in avalanche terrain). I have received training in facilitation through the Oregon Mediation Association, the International Institute for Public Participation (IAP2), the National Institute for Dialogue & Deliberation, the Oregon Consensus Program, and elsewhere.

My facilitation projects are diverse. Among other projects, I have:

- Facilitated the Oregon Attorney General's workgroup helping craft the successful foreclosure mediation program;
- Participated in an Oregon Department of Education pilot program helping facilitate meetings among school district and "building" administrators, teachers, learning specialists, parents, parent advisers, health care professionals, attorneys, and sometimes students themselves, guiding them past conflict to collaborate on Individualized Education Programs that guide the student's education with consideration given to both pedagogic principles and federal law (several dozen such cases);
- Worked with the Oregon Consensus Program in 2007-2008 to convene and perform early-stage facilitation for the West Eugene Collaborative (bringing together 27 business, environmental, government, citizen, and other stakeholder representatives to bridge developmental hurdles in a growing but environmentally sensitive part of Eugene). (See Qualifying Case Forms for more details.)

In addition to my professional experience, I also have substantial large group facilitation experience in a volunteer capacity, including supporting a joint effort by several sheriffs' offices and the Mt. Hood Search & Rescue Council to revise Oregon's first responder and Good Samaritan laws in 2008-2009, helping the Condominium Working Group revise Oregon's condominium and planned community laws in 1999, and serving in leadership roles in various NGOs (including organizations in crisis).

Section 13: Public Policy Facilitation Experience

Please see Section 12, above.

Section 14: Experience as a Public Involvement Practitioner

Not applying.

Section 15: Qualifying Cases

(Must also be documented with a "Qualifying Case Form" found in Exhibit 2 to Attachment C)

A. Facilitation General Practitioner

☒ Yes, I wish to provide this type of ADR Service and I meet the Facilitation General Practitioner minimum qualifications. I have been a principle professional facilitator in at least five facilitation projects ("cases") involving a governmental entity. These cases are documented on separate "Qualifying Case Forms" as case # 1; 2; 3; 4; and 5; and I have at least 200 hours of facilitation experience, as documented in Section 11 of the SOQ.

B. Public Policy Facilitator

Yes, I wish to provide this type of ADR Service and I meet the following the Public Policy Facilitator minimum qualification:

☐ Option 1 – I am a "Senior Level Neutral Public Policy Consensus Services Practitioner" in the Oregon Consensus Program Network <http://www.orconsensus.pdx.edu/mediators.php> OR

☒ Option 2 – I have been a Public Policy Facilitator in at least (3) successful collaborative public policy projects ("cases"). Each of these cases are documented on a separate "Qualifying Case Form" as # 6; 7; and 8; and each project involved at least one governmental entity; at least four distinct parties; had a consensus or agreement-seeking component; and involved at least 40 hours of professional facilitator time.

C. Public Involvement Practitioner

☐ Yes, I wish to provide this type of ADR Service and I meet the Public Involvement Practitioner minimum qualifications. I have been a Public Involvement Practitioner in at least (3) successful public involvement projects ("cases"). These cases are documented on separate "Qualifying Case Forms" as case # ; ; and ; and each involved at least one governmental entity and at least 40 professional project hours.

Section 15: Qualifying Cases

(Must also be documented with a "Qualifying Case Form" found in Exhibit 2 to Attachment C)

A. Facilitation General Practitioner

☒ Yes, I wish to provide this type of ADR Service and I meet the Facilitation General Practitioner minimum qualifications. I have been a principle professional facilitator in at least five facilitation projects ("cases") involving a governmental entity. These cases are documented on separate "Qualifying Case Forms" as case #1; 2; 3; 4; and 5; and I have at least 200 hours of facilitation experience, as documented in Section 11 of the SOQ.

B. Public Policy Facilitator

Yes, I wish to provide this type of ADR Service and I meet the following the Public Policy Facilitator minimum qualification:

☐ Option 1 – I am a "Senior Level Neutral Public Policy Consensus Services Practitioner" in the Oregon Consensus Program Network <http://www.orconsensus.pdx.edu/mediators.php> OR

☐ Option 2 – I have been a Public Policy Facilitator in at least (3) successful collaborative public policy projects ("cases"). Each of these cases are documented on a separate "Qualifying Case Form" as #___; ___; and ___; and each project involved at least one governmental entity; at least four distinct parties; had a consensus or agreement-seeking component; and involved at least 40 hours of professional facilitator time.

C. Public Involvement Practitioner

☐ Yes, I wish to provide this type of ADR Service and I meet the Public Involvement Practitioner minimum qualifications. I have been a Public Involvement Practitioner in at least (3) successful public involvement projects ("cases"). These cases are documented on separate "Qualifying Case Forms" as case #___; ___; and ___; and each involved at least one governmental entity and at least 40 professional project hours.

Exhibit 2 to Attachment C

Qualifying Case Form

(Reproduce this form as needed for each case or project you are documenting. See Exhibit 1 to Attachment C for instructions)

Case or Project name	Oregon Department of Justice - Foreclosure Mediation				
Case #: <i>Number your cases consecutively</i>	1	Year you began this case:	2014	# of parties in this case/project:	16
(Check all that apply) Category of ADR experience that applies to this case or project.					
<input checked="" type="checkbox"/>	#2. Facilitation General Practitioner				
<input type="checkbox"/>	#3. Public Policy Facilitator				
<input type="checkbox"/>	#4. Public Involvement Practitioner				
Case Contact (someone who can verify your role in this matter, including their contact information)					
Susan M. Leeson, (503) 588-0535					
Case Description (below)					
Facilitated Oregon Department of Justice workgroup assisting in creation of successful statewide foreclosure mediation/facilitation program.					

Exhibit 2 to Attachment C

Qualifying Case Form

(Reproduce this form as needed for each case or project you are documenting. See Exhibit 1 to Attachment C for instructions)

Case or Project name	West Eugene Collaborative				
Case #: Number your cases consecutively	2	Year you began this case:	2007	# of parties in this case/ project:	27
(Check all that apply) Category of ADR experience that applies to this case or project.					
<input checked="" type="checkbox"/>	#2. Facilitation General Practitioner				
<input type="checkbox"/>	#3. Public Policy Facilitator				
<input type="checkbox"/>	#4. Public Involvement Practitioner				
Case Contact (someone who can verify your role in this matter, including their contact information)					
Elaine Hallmark, hallmarkelaine@gmail.com					
Case Description (below)					
<p>With the Oregon Consensus Program, facilitated convening phase of multi-stakeholder group addressing contentious land use, economic, transportation, community, and environmental issues affecting development and preservation in West Eugene, Oregon.</p>					

Exhibit 2 to Attachment C

Qualifying Case Form

(Reproduce this form as needed for each case or project you are documenting. See Exhibit 1 to Attachment C for instructions)

Case or Project name	S.R. and School District				
Case #: <i>Number your cases consecutively</i>	3	Year you began this case:	2014	# of parties in this case/project:	2
(Check all that apply) Category of ADR experience that applies to this case or project.					
<input checked="" type="checkbox"/>	#2. Facilitation General Practitioner				
<input type="checkbox"/>	#3. Public Policy Facilitator				
<input type="checkbox"/>	#4. Public Involvement Practitioner				
Case Contact (someone who can verify your role in this matter, including their contact information)					
Kathy Keim-Robinson Director of Student Services Parkrose School District 10636 NE Prescott Portland OR 97220 503.408.2118					
Case Description (below)					
Successfully facilitated high-emotion, complex dispute between school district and family of student eligible for special education services. Although technically only two parties, facilitation involved multiple school personnel from a variety of disciplines.					

Exhibit 2 to Attachment C

Qualifying Case Form

(Reproduce this form as needed for each case or project you are documenting. See Exhibit 1 to Attachment C for instructions)

Case or Project name	B.B. and School District				
Case #: <i>Number your cases consecutively</i>	4	Year you began this case:	2016	# of parties in this case/project:	2
(Check all that apply) Category of ADR experience that applies to this case or project.					
<input checked="" type="checkbox"/>	#2. Facilitation General Practitioner				
<input type="checkbox"/>	#3. Public Policy Facilitator				
<input type="checkbox"/>	#4. Public Involvement Practitioner				
Case Contact (someone who can verify your role in this matter, including their contact information)					
<p>Lori Thompson Director of Student Services St. Helens School District lorit@sthelens.k12.or.us 503-366-7232</p>					
Case Description (below)					
<p>Successfully facilitated high-emotion, complex dispute between school district and family of student eligible for special education services. Although technically only two parties, facilitation involved multiple school personnel from a variety of disciplines, and multiple family members with varying viewpoints.</p>					

Exhibit 2 to Attachment C

Qualifying Case Form

(Reproduce this form as needed for each case or project you are documenting. See Exhibit 1 to Attachment C for instructions)

Case or Project name	D.K. and School District				
Case #: <i>Number your cases</i>	5	Year you began this case:	2016	# of parties in this case/ project:	2
(Check all that apply) Category of ADR experience that applies to this case or project.					
<input checked="" type="checkbox"/>	#2. Facilitation General Practitioner				
<input type="checkbox"/>	#3. Public Policy Facilitator				
<input type="checkbox"/>	#4. Public Involvement Practitioner				
Case Contact (someone who can verify your role in this matter, including their contact information)					
Marla Stephenson Superintendent Estacada School District 503 630-6871					
Case Description (below)					
Successfully facilitated high-emotion, complex dispute between school district and family of student eligible for special education services. Although technically only two parties, facilitation involved multiple school personnel from a variety of disciplines.					

ATTACHMENT E PROPOSER CERTIFICATION SHEET

1. Proposer understands and accepts the requirements of this RFP. By Proposal submission, Proposer agrees to be bound by the Price Agreement terms and conditions in Attachment A and as modified by Addenda, except for those terms and conditions that Agency has reserved for negotiation in the RFP.
2. Proposer acknowledges receipt of any and all Addenda to this RFP.
3. Proposal is FIRM for 180 days following the Closing.
4. If awarded a Contract/Price Agreement, Proposer agrees to perform the scope of work and meet the performance standards set forth in the final negotiated scope of work of the Contract or Work Order Contract.
5. Under penalty of perjury, Proposer certifies that Proposer is aware of and complies with the requirements found in OAR 125-246-0330. Upon request of Agency, Proposer shall provide supporting documentation.
6. Proposer does not discriminate in its employment practices with regard to race, creed, age, religious affiliation, sex, disability, sexual orientation or national origin. Nor has Proposer or will Proposer discriminate against a subcontractor in the awarding of a subcontract because the subcontractor is:
 - a minority, women or emerging small business enterprise certified under ORS 200.055, or
 - a business enterprise that is owned or controlled by or that employs a disabled veteran, as defined in ORS 408.225
7. Proposer and its employees and agents are not included on the list titled "Specially Designated Nationals and Blocked Persons" maintained by the Office of Foreign Assets Control of the United States Department of the Treasury and currently found at: <http://www.treas.gov/offices/enforcement/ofac/sdn/t11sdn.pdf>.

Proposer certifies that, to the best of its knowledge, there exists no actual or potential conflict between the business or economic interests of Proposer, its employees, or its agents, on the one hand, and the business or economic interests of the State, on the other hand, arising out of, or relating in any way to, the subject matter of the RFP. Proposer shall provide prompt written notification to the State of any change occurring with respect to Proposer's business or interests which is reasonably likely to result in (or has resulted in) an actual or potential conflict between the business or economic interests of the Proposer and those of the State, arising out of, or relating in any way to, the subject matter of the RFP.

In its notice, Proposer will describe the nature of such actual or potential conflict of interest or remuneration in question in reasonable detail.

8. Proposer certifies that all contents of the Proposal (including any other forms or documentation, if required under this RFP) and this Proposal Certification Sheet, are truthful and accurate and have been prepared independently from all other Proposers, and without collusion, fraud, or other dishonesty.
9. Proposer understands that any statement or representation it makes, in response to this RFP, if determined to be false or fraudulent, a misrepresentation, or inaccurate because of the omission of material information could result in a "claim" {as defined by the Oregon False Claims Act, ORS 180.750(1)}, made under Price Agreement being a "false claim" {ORS 180.750(2)} subject to the Oregon False Claims Act, ORS 180.750 to 180.785, and to any liabilities or penalties associated with the making of a false claim under that Act.
10. Proposer acknowledges these certifications are in addition to any certifications required in the Price Agreement and Statement of Work in Attachment A at the time of Price Agreement execution.



Authorized Signature

9/6/2016
Date

Scott Bellows, Principal, Dispute Solutions LLC
(Print Name and Title)

ATTACHMENT F PROPOSER INFORMATION SHEET

Proposer Name and Address		
D1	Legal Name of Proposer	DISPUTE SOLUTIONS LLC
	Address	P.O. BOX 23146
	City, State, Zip	PORTLAND, OR 97281

Contact Person for Questions/Contract Negotiations		
D2	Name:	SCOTT BELLAWS
	Title:	PRINCIPAL
	Address:	P.O. BOX 23146, PORTLAND, OR 97281
	Phone:	(503) 345-9343
	Email Address:	scott@disputeresolutions.org

Proposer Information		
D3	Company Type (sole proprietor, partnership, etc.):	LLC
	Legal Entity Name	Dispute Solutions LLC
	State of incorporation:	OREGON
	Date of incorporation:	12/10/2002
	Federal Tax ID number	26-3070399
	Oregon Business Registry Number (if applicable)	117865-97

Dispute/ Litigation		
D4	Within the past 5 years, has Proposer been a party to a dispute with any customer in an administrative or civil judicial proceeding relative to the scope of this RFP? If yes, please explain below:	NO

Key Persons		
D5	Name	Title
	SCOTT BELLows	PRINCIPAL

ATTACHMENT G
AFFIDAVIT OF COMPLIANCE WITH TAX LAWS

Michael Scott Bellows, Jr. Dispute Solutions
I, Michael Scott Bellows, Jr. (Affiant), being first duly sworn under oath, and representing Dispute Solutions LLC,
~~of firm~~ (hereafter "Offeror"), hereby deposes and swears or affirms under penalty of perjury that:

1. I am an authorized agent of the Offeror, and I have full authority from the Offeror to submit this affidavit and accept the responsibilities stated herein.
2. I have knowledge regarding Offeror's payment of taxes, and to the best of my knowledge, Offeror is not in violation of any Oregon tax laws, including, without limitation, ORS 305.620 and ORS chapters 316, 317 and 318.
3. Offeror shall provide written notice to Agency within two business days of any change to the Offeror's status of tax law compliance.

M. Scott Bellows, Jr. 8/6/2016
Affiant's Signature

State of

) ss:

County of

Signed and sworn to before me on (date) by (Affiant's name).

Notary Public for the State of

My Commission Expires:

← ORIGINAL NOTARIZED
COPY IS INCLUDED
WITH RESP. TO RFP.

ATTACHMENT J – OMWESB OUTREACH PLAN

MWESB Participation

As noted in Governor Kitzhaber's Executive Order 12-03: "Minority-owned and Woman-owned businesses continue to be a dynamic and fast-growing sector of the Oregon economy. Oregon is committed to creating an environment that supports the ingenuity and industriousness of Oregon's Minority Business Enterprise [MBE] and Woman Business Enterprise [WBE]. Emerging Small Business [ESB] firms are also an important sector of the state's economy."

Oregon MWESB certified firms, as defined in ORS 200.055, have an equal opportunity to participate in the performance of Price Agreements financed with state funds. By submitting its Proposal, Proposer certifies that it will take reasonable steps to ensure that MWESB certified firms are provided an equal opportunity to compete for and participate in the performance of any subcontracts resulting from this procurement. Proposer further certifies and agrees that it has not discriminated and will not discriminate in its employment practices with regard to race, creed, age, religious affiliation, sex, disability, sexual orientation or national origin, and it has not discriminated and will not discriminate against a subcontractor in the awarding of a subcontract because the subcontractor is a minority, woman or emerging small business enterprise certified under ORS 200.055.

If there may be opportunities for subcontractors to work on the project, it is the expectation of Agency that the Proposer will take reasonable steps to ensure that MWESB certified firms are provided an equal opportunity to compete for and participate in the performance of any contract and/or subcontracts resulting from this procurement.

Prior to Price Agreement Award, the highest ranked Proposer must provide, within five days of Notice of Intent to Award, an MWESB Outreach Plan using the form on the following page. The information submitted on this form to this clause will not be considered in any scored evaluation and no evaluative points will be assigned to the information.

Is Proposer an Oregon certified Minority-Owned, Woman-Owned or Emerging Small Business?

Yes ☒ No ☐

If yes, indicate all certification type(s): MBE ☐ WBE ☐ ESB ☒ DBE ☐

Oregon State Certification number: 8993

Does Proposer foresee any subcontracting opportunities for this procurement? Yes ☐ No ☒

If no, do not complete the rest of this form.

The Proposer shall provide a narrative description of its experience in obtaining MWESB firms participation as subcontractors, consultants or suppliers on previous projects, and discuss any innovative or particularly successful measures that the Proposer has undertaken. The Proposer shall

include a list of those certified firms with which it has had a contractual relationship during the past 24 months immediately preceding the date this solicitation document was issued. If none, mark the following checkbox:

☐ ***No prior experience obtaining participation from MWESB certified firms.***

The Proposer shall provide examples where MWESB participation was achieved, along with information on MWESB subcontracting participation levels for up to three projects/contracts that the Proposer is either currently performing or has completed within the past 24 months immediately preceding the date this solicitation document was issued. MWESB participation should be described as the percentage of the dollar value of subcontracts and material or supply contracts awarded to MWESBs as compared with the total dollar value of subcontracts and material or supply contracts let for each identified project or contract. The Proposer shall describe any technical assistance or mentoring the firm provided to MWESB firms subcontracting on each project. If none, mark the following checkbox:

☐ ***No prior experience obtaining participation from MWESB certified firms.***

Project 1 Name _____

Award Date ____/____/____ Completion Date ____/____/____ Contract Award Amount \$ _____

MWESB goal percentage, if applicable _____% MWESB achievement percentage _____%

MWESB Subcontract Award Amount \$ _____ MWESB Spend Achieved \$ _____

Describe any technical assistance or mentoring provided to MWESB firms subcontracting on this project.

Project 2 Name _____

Award Date ___/___/___ Completion Date ___/___/___ Contract Award Amount \$ _____

MWESB goal percentage, if applicable _____% MWESB achievement percentage _____%

MWESB Subcontract Award Amount \$ _____ MWESB Spend Achieved \$ _____

Describe any technical assistance or mentoring provided to MWESB firms subcontracting on this project.

Project 3 Name _____

Award Date ___/___/___ Completion Date ___/___/___ Contract Award Amount \$ _____

MWESB goal percentage, if applicable _____% MWESB achievement percentage _____%

MWESB Subcontract Award Amount \$ _____ MWESB Spend Achieved \$ _____

Describe any technical assistance or mentoring provided to MWESB firms subcontracting on this project.

If the total cost of the awarded contract is expected to be greater than \$150,000, the Proposer shall describe the outreach and subcontracting plan it will use, if awarded the contract, to provide Oregon MWESB certified firms an equal opportunity to perform any subcontracts under the contract. The plan must be realistic and based on Proposer's successful past experience. If Proposer has no previous outreach experience, the Proposer shall describe the outreach plan it intends to use if awarded the contract.

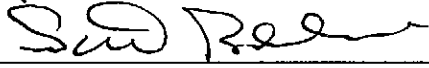
The Proposer must include the following in its plan:

- i. A description of the steps that the Proposer will take to solicit MWESB participation;
- ii. A description of the mentoring, technical or other business development assistance the

Proposer will provide to subcontractors needing or requesting such services.

If awarded the Price Agreement, the Proposer must accept, as contract performance obligations, the outreach and subcontracting plan described in this section. ***If certified firms are unavailable for type of work to be performed, please indicate in this section.***

Company Name: Dispute Solutions LLC

Authorized Signature:  Date: 9/6/2016

Name of Authorized Representative: Scott Bellows

Title: Principal

Attachment K

REFERENCE CHECK FORM

This Section is to be completed by ADR Provider/Proposer

It is your responsibility as the Provider/Proposers to have this form completed by your reference contact. You must timely submit this form with your Proposal. At least one reference is needed for each ADR Service category you are applying for. (One form/Reference Contact may be used for more than one ADR Service category if that contact can in fact speak to those multiple areas of your expertise.)

ADR Provider Name:	Scott Bellows
Reference Contact Name:	Mike Franklin
Reference Contact Organization:	Oregon Department of Education
Reference Telephone #:	503-947-5689
Reference Email Address:	Mike.franklin@ode.state.or.us

Check the ADR service category or categories below that this particular reference applies to:

☒ **Mediation General Practioner** - an impartial third party who assists two or more parties in reaching a mutually acceptable resolution to a controversy. These Practioneers have broad mediation experience and skills and are able to adapt mediation to a wide variety of circumstances, including workplace disputes. To qualify in this category you must demonstrate 200 hours of this type of experience. A good reference should be able to confirm some or all of your experience hours and that you've successfully done this type of work in a specific case(s).

☒ **Facilitation General Practioner** - an expert at helping large groups work effectively towards a desired objective. These Practioneers have sufficiently broad experience and skills so as to be able to design and facilitate a large group process to achieve variety of goals or objectives. To qualify in this category you must demonstrate 200 hours of this type of experience. A good reference should be able to confirm some or all of your experience hours and that you've successfully done this type of work in a specific case(s).

☐ **Public Policy Facilitator** - an expert at helping governmental entities and diverse stakeholders reach agreement on controversial public policies or public projects, often within a complex legal, political or regulatory context. These providers are experienced at assessing, designing, convening and facilitating collaborative processes. A good reference should be able to speak to your successful experience in one or more cases/projects in this category.

☐ **Public Involvement Practioner** - an expert at helping governmental entities engage the public on public issues or projects. These providers are able to design and implement an appropriate public involvement process from projects that seek to inform or educate the public to projects that allow for greater public involvement via consultation or collaboration. A good reference should be able to speak to your successful experience in one or more cases/projects in this category.

This Section is to be completed by ADR Provider/Proposer

Provide in the box below a brief summary of the case, project or experience that you are asking this reference contact to verify. This might include the type of ADR Services you were providing, project hours and project outcomes necessary to demonstrate that you meet the minimum requirements for the ADR Service categories you checked on the previous page.

Case/Project Summary

Multiple (approx. 100) complex mediations and facilitations involving multiple stakeholders, including government agencies (primarily school districts and Education Service Districts, and occasionally state disabilities and social services agencies), involving special education and disability accommodations and related legal issues.

This Section to be completed by the Reference Contact

You are being asked to provide a reference for the ADR Provider identified on the other side of this form. Please return the completed and signed form to the ADR Provider. (This form may be completed manually or electronically)

Can you verify that the ADR Provider was involved in the activity as described in the case/project summary above? (check one) ☒ Yes ☐ No

Comments:

Describe your professional role or relationship with this Provider:

Contract Administrator for the Oregon Department of Education - Special Education Dispute Resolution

This Section to be completed by Reference contact

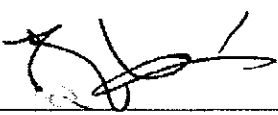
Describe your level of satisfaction with this ADR Provider's services.

High level of satisfaction. Maintains the dignity and confidentiality of all parties and demonstrates a high level of successful mediations.

How likely would you be to use Proposer's services again if the need arose? (Check one)

☒ Likely ☐ Not Likely ☐ Don't Know/Unsure

Comments:

Date	9/6/16
Reference contact Name (Print)	Mike Franklin
Reference Contact Signature: <i>I verify that I am the Reference contact and that the information I provided above is truthful and accurate. (If completed electronically your typed name is equivalent to your manual signature.)</i>	
Reference Title	Special Education Legal Specialist
Reference Organization	Oregon Department of Education
Reference Phone	503-947-5689
Reference Email	mike.franklin@ode.state.or.us