

## **REQUEST FOR PROPOSAL #16-2368GD**

### **Professional Tourism Inquiry and Fulfillment Services**

Manatee County, a political subdivision of the State of Florida (hereinafter "Manatee County" or the "County") will receive proposals from individuals, corporations, partnerships, and other legal entities authorized to do business in the State of Florida, to provide professional tourism inquiry and fulfillment services to the Bradenton Area Convention and Visitors Bureau (BACVB).

**DEADLINE FOR CLARIFICATION REQUESTS:** July 12, 2016 at 4:00 P.M. shall be the deadline to submit all inquiries, suggestions, or requests concerning interpretation, clarification or additional information pertaining to this Request for Proposal to the Manatee County Purchasing Division. This deadline has been established to maintain fair treatment for all potential bidders or Proposers, while ensuring an expeditious transition to a final agreement.

**TIME AND DATE DUE:** Proposals will be received until July 19, 2016 at 3 P.M. at which time they will be publicly opened. All interested parties are invited to attend this opening.

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**Important Note:**    **A prohibition of Lobbying is in place. Please review paragraph A.19 carefully to avoid violation and possible sanctions.**

#### **FOR INFORMATION CONTACT:**

Greg Davis, Contracts Negotiator  
(941) 749-3037, Fax (941) 749-3034  
Email: [gregory.davis@mymanatee.org](mailto:gregory.davis@mymanatee.org)  
Manatee County Financial Management Department  
Purchasing Division

AUTHORIZED FOR RELEASE: 

## **SECTION A: INFORMATION TO PROPOSERS**

PROPOSERS MUST COMPLY WITH THE FOLLOWING INSTRUCTIONS TO BE CONSIDERED FOR SELECTION.

### **A.01 OPENING LOCATION**

These proposals will be publicly opened at Manatee County Purchasing Division, 1112 Manatee Avenue West, 8<sup>th</sup> Floor, Suite 803, Bradenton, Florida 34205, in the presence of County officials at the time and date stated on the cover sheet. All Proposers or their representatives are invited to attend.

### **A.02 PROPOSAL INFORMATION AND PROPOSAL DOCUMENTS**

Request For Proposals on <http://www.myanatee.org>

Request For Proposal documents and the Notices of Intent to Award related to those Proposals are available for download in a portable document format (.PDF) file on the Manatee County web page on the Purchasing tab under "Bids and Proposals". You may access these files using Adobe Acrobat software. You may download a free copy of this software (Adobe) from the County's web page if you do not have.

Manatee County collaborates with the Manatee Chamber of Commerce on distributing solicitations using the Chambers website: <http://www.Manateechamber.com>. This step is in addition to the posting on Manatee County Government web page.

Manatee County may also use an internet service provider to distribute Bids and Proposals. A link to that service <http://www.DemandStar.com>, is provided on this website under the Tab "MyDemandStar". Participation in the DemandStar system is not a requirement for doing business with Manatee County.

Note: The County posts the **Notice of Source Selection** prior to COMMENCING NEGOTIATIONS with the selected firms.

IT IS THE RESPONSIBILITY OF EACH PROPOSER, PRIOR TO SUBMITTING THEIR PROPOSAL, TO CONTACT THE MANATEE COUNTY PURCHASING DIVISION (see contact information on page one of this document) TO DETERMINE IF ADDENDA WERE ISSUED AND TO MAKE SUCH ADDENDA A PART OF THEIR PROPOSAL.

### **A.03 REQUIREMENTS FOR FORMAT AND DELIVERY OF PROPOSALS**

Any proposals received after the stated time and date will not be considered. It shall be the sole responsibility of the Proposer to have their proposal delivered to the Manatee County Purchasing Division for receipt on or before the stated time and date. If a proposal is sent by U.S. Mail, the Proposer shall be responsible for its timely delivery to the Purchasing Division. Proposals delayed by mail shall not be considered, shall not be opened at the public opening, and arrangements shall be made for their return at the Proposer's request and expense.

Proposals must be submitted in the format specified in Section C hereof. The contents of each proposal shall be **separated and arranged with tabs in the same order as listed in the**

**Subsections within Section C** identifying the response to each specific item thereby facilitating expedient review of all responses.

#### **A.04 CLARIFICATION & ADDENDA**

Each Proposer shall examine all Request for Proposal documents and shall judge all matters relating to the adequacy and accuracy of such documents. Any inquiries, suggestions or requests concerning interpretation, clarification or additional information pertaining to the Request for Proposal shall be made in writing through the Manatee County Purchasing Division. The County shall not be responsible for oral interpretations given by any County employee, representative, or agent. The issuance of a written addendum by the Purchasing Division is the only official method whereby interpretation, clarification or additional information can be given.

Addenda shall be posted on <http://www.mymanatee.org>.

It shall be the responsibility of each Proposer, prior to submitting their proposal, to contact the Manatee County Purchasing Division at (941)748-4501, ext. 3014 to determine if addenda were issued and to acknowledge receipt of same on the Proposal Signature page (Attachment A).

**DEADLINE FOR CLARIFICATION REQUESTS:** **July 12, 2016 at 4:00 P.M** shall be the deadline to submit all inquiries, suggestions, or requests concerning interpretation, clarification or additional information pertaining to this Request for Proposal to the Manatee County Purchasing Division.

This deadline has been established to maintain fair treatment for all potential bidders or Proposers, while ensuring an expeditious transition to a final agreement.

#### **A.05 SEALED & MARKED**

Manatee County requires a total of seven copies of your proposal to be submitted in one sealed package. The contents of your sealed package shall include: **One signed Original (marked Original) and Five (5) Copies (each marked Copy) and One (1) Electronic copy.** The electronic copy shall be in a pdf format and submitted on a CD or USB flash drive which is non-returnable. ***All seven copies of your proposal shall be identical.***

Your entire proposal package shall be submitted in one sealed package addressed from your company (name and address) and clearly marked on the outside "**Sealed Proposal #16-2368GD Professional Tourism Inquiry and Fulfillment Services**" and addressed to:

Manatee County Purchasing Division  
1112 Manatee Avenue West, Suite 803  
Bradenton, FL 34205

#### **A.06 LEGAL NAME**

Proposals shall clearly indicate the legal name, address and telephone number of the Proposer (company, firm, partnership, individual). Proposals shall be signed above the typed or printed name and title of the signer. The signer shall have the authority to bind the Proposer to the submitted proposal.

#### **A.07 PROPOSAL EXPENSES**

All expenses for making proposals to the County are to be borne by the Proposer.

#### **A.08 EXAMINATION OF OFFER**

The examination of the proposal and the Proposer generally requires a period of not less than ninety (90) calendar days from the date of the opening of the proposals.

#### **A.09 DISCLOSURE**

Upon receipt, all inquiries and responses to inquiries related to this Request for Proposal become "Public Records", and shall be subject to public disclosure consistent with Florida Statutes, Chapter 119.

Bids become subject to disclosure thirty (30) days after the opening or if a notice of intent to award decision is made earlier than this time as provided by Florida Statutes § 119.071(1)(b). No announcement or review of the bid shall be conducted at the public bid opening.

Based on the above, Owner will receive bids at the time and date stated and will make public at the opening the names of the business entities of all that submitted a bid and any amount presented as a total offer without any verification of the mathematics or the completeness of the bid.

If Owner rejects all bids and concurrently notices its intent to reissue the solicitation, the rejected bids are exempt from public disclosure until such time as Owner provides notice of an intended decision concerning the reissued solicitation or until Owner withdraws the reissued solicitation. A bid is not exempt for longer than twelve (12) months after the initial notice rejecting all bids.

**IF THE CONTRACTOR HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE CONTRACTOR'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS CONTRACT, CONTACT OWNER'S CUSTODIAN OF PUBLIC RECORDS AT: (941) 742-5845, debbie.scaccianoce@mymanatee.org, Attn: Records Manager, 1112 Manatee Ave W., Bradenton, FL 34205.**



Pursuant to Florida Statutes 119.0701, to the extent CONTRACTOR is performing services on behalf of the COUNTY, contractor must:

- a. Keep and maintain public records required by public agency to perform the service.
- b. Upon request from the public agency's custodian of public records, provide the public agency with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided in Florida Statutes, Chapter 119, or as otherwise provided by law.
- c. Ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law for the duration of the contract term and following completion of the contract if the contractor does not transfer the records to the public agency.
- d. Upon completion of the contract, transfer, at no cost, to the public agency all public records in possession of contractor or keep and maintain public records required by the public agency to perform the service. If the contractor transfers all public records to the public agency upon completion of the contract, the contractor shall destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. If the contractor keeps and maintains public records upon completion of the contract, the contractor shall meet all applicable requirements for retaining public records. All records stored electronically must be provided to the public agency, upon request from public agency's custodian of public records, in a format that is compatible with the information technology systems of the public agency.

#### **A.10 CONFIDENTIALITY OF SECURITY RELATED RECORDS**

(a) Pursuant to Florida Statutes § 119.071(3), the following records (hereinafter referred to collectively as "the Confidential Security Records") are confidential and exempt from the disclosure requirements of Florida Statutes § 119.07(1):

1. A Security System Plan or portion thereof for any property owned by or leased to the County or any privately owned or leased property held by the County.
2. Building plans, blueprints, schematic drawings, and diagrams, including draft, preliminary, and final formats, which depict the internal layout and structural elements of a building, arena, stadium, water treatment facility, or other structure owned or operated by the County.
3. Building plans, blueprints, schematic drawings, and diagrams, including draft, preliminary, and final formats, which depict the internal layout or structural elements of an attractions and recreation facility, entertainment or resort complex, industrial complex, retail and service development, office development, or hotel or motel development in the possession of, submitted to the County.

(b) Contractor/Vendor agrees that it shall not, as a result of a public records request or for any other reason disclose the contents of, or release or provide copies of the Confidential Security Records to any other party absent the express written authorization of the County's Property Management Director or to comply with a court order requiring such release or disclosure. To the extent Contractor/Vendor receives a request for such records, it shall immediately contact

the County's designated Contract Manager who shall coordinate the County's response to the request. Notwithstanding the foregoing, the Contractor/Vendor may

1. Disclose or release Security System Plans to:

- (A) The property owner or leaseholder; or
- (B) Another state or federal agency to prevent, detect, guard against, respond to, investigate, or manage the consequences of any attempted or actual act of terrorism, or to prosecute those persons who are responsible for such attempts or acts.

2. Disclose or release building plans, blueprints, schematic drawings, and diagrams, including draft, preliminary, and final formats, which depict the internal layout and structural elements of a building, arena, stadium, water treatment facility, or other structure owned or operated by the County:

- (A) To another governmental entity if disclosure is necessary for the receiving entity to perform its duties and responsibilities;
- (B) To a licensed architect, engineer, or contractor who is performing work on or related to the building, arena, stadium, water treatment facility, or other structure owned or operated by the County and is contractually bound by the Contractor/Vendor to comply with this Article/Section; or
- (C) Upon a showing of good cause before a court of competent jurisdiction.

(c) For purposes of this Article/Section, the term "Security System Plan" includes all:

- 1. Records, information, photographs, audio and visual presentations, schematic diagrams, surveys, recommendations, or consultations or portions thereof relating directly to the physical security of the facility or revealing security systems;
- 2. Threat assessments conducted by any agency or any private entity;
- 3. Threat response plans;
- 4. Emergency evacuation plans;
- 5. Sheltering arrangements; or
- 6. Manuals for security personnel, emergency equipment, or security training.

#### **A.11 ERRORS OR OMISSIONS**

Once a proposal is submitted, the County shall not accept any request by any Proposer to correct errors or omissions in the proposal.

#### **A.12 DISQUALIFICATION DUE TO NON-RESPONSIVENESS**

Manatee County reserves the right to find that any proposal received which does not contain all of the information, attachments, verification, forms or other information, may be considered non-responsive and therefore be disqualified from eligibility to proceed further in the RFP process.

#### **A.13 RESERVED RIGHTS**

The County reserves the right to accept or reject any and/or all proposals, to waive irregularities and technicalities, and to request resubmission. Any sole response received by the first submission date may or may not be rejected by the County, depending on available competition and timely needs of the County. The County reserves the right to award the contract to a

responsible Proposer submitting a responsive proposal, with a resulting negotiated agreement which is most advantageous and in the best interests of the County. The County shall be the sole judge of the proposal, and the resulting negotiated agreement that is in its best interest and its decision shall be final. Also, the County reserves the right to make such investigation as it deems necessary to determine the ability of any Proposer to perform the work or service requested. Information the County deems necessary to make this determination shall be provided by the Proposer. Such information may include, but shall not be limited to: current financial statements prepared by an independent CPA; verification of availability of equipment and personnel; and past performance records.

#### **A.14 APPLICABLE LAWS**

Proposer must be authorized to transact business in the State of Florida. All applicable laws and regulations of the State of Florida and ordinances and regulations of Manatee County will apply to any resulting agreement. Any involvement with any Manatee County procurement shall be in accordance with Manatee County Code Chapter 2-26.

**A.15 CODE OF ETHICS**

With respect to this proposal, if any Proposer violates, directly or indirectly, the ethics provisions of the Manatee County Procurement Ordinance and/or Florida criminal or civil laws related to public procurement, including but not limited to Florida Statutes Chapter 112, Part II, Code of Ethics for Public Officers and Employees, such Proposer will be disqualified from eligibility to perform the work described in this Request for Proposal, and may also be disqualified from furnishing future goods or services to, and from submitting any future bids or proposals to supply goods or services to, Manatee County.

By submitting a proposal, the Proposer represents to the County that all statements made and materials submitted are truthful, with no relevant facts withheld. If a Proposer is determined to have been untruthful in its proposal or any related presentation, such Proposer will be disqualified from eligibility to perform the work described in this Request for Proposal, and may also be disqualified from furnishing future goods or services to, and from submitting any future bids or proposals to supply goods or services to, Manatee County.

**A.16 COLLUSION**

By offering a submission to this Request for Proposal the Proposer certifies the Proposer has not divulged to, discussed or compared his proposal with other Proposers and has not colluded with any other Proposer or parties to this proposal whatsoever. Also, the Proposer certifies, and in the case of a joint proposal, each party thereto certifies, as to their own organization that in connection with this proposal:

- a. any prices and/or data submitted have been arrived at independently, without consultation, communication or agreement, for the purpose of restricting competition, as to any matter relating to such prices and/or cost data, with any other Proposer or with any competitor;
- b. any prices and/or cost data quoted for this proposal have not been knowingly disclosed by the Proposer prior to the scheduled opening directly or indirectly to any competitor;
- c. no attempt has been made or will be made by the Proposer to induce any other person or firm to submit or not to submit a proposal for the purpose of restricting competition;
- d. the only person or persons interested in this proposal as principal or principals is/are named therein and that no person other than therein mentioned has any interest in this proposal or in the contract to be entered into; and
- e. no person or agency has been employed or retained to solicit or secure this contract upon an agreement or understanding for a commission, percentage, brokerage, or contingent fee, excepting bona fide employees.

**A.17 PUBLIC ENTITY CRIMES**

In accordance with Section 287.133, Florida Statutes, a person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a proposal on a contract to provide any goods or services to a public entity, may not submit a proposal on a contract with a public entity for the construction or repair of a public building or public work, may not submit proposals on leases or real property to a public entity, may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity, and may not transact business with any public entity in excess of the



threshold amount provided in Section 287.017 for Category Two for a period of 36 months from the date of being placed on the convicted vendor list.

In addition, Manatee Code of Laws Chapter 2-26 Article V prohibits the award of County contracts to any person or entity who/which has, within the past 5 years, been convicted of, or admitted to in court or sworn to under oath, a public entity crime or of any environmental law that, in the reasonable opinion of the Purchasing Official, establishes reasonable grounds to believe the person or business entity will not conduct business in a reasonable manner.

To ensure compliance with the foregoing, the Code requires all persons or entities desiring to contract with the County to execute and file with the purchasing official an affidavit, executed under the pain and penalties of perjury, confirming that person, entity, and any person(s) affiliated with the entity, does not have such a record and is therefore eligible to seek and be awarded business with the County. **Proposer is to complete Attachment "B" and submit with your proposal.**

#### **A.18 SCRUTINIZED COMPANIES**

Florida Statutes § 287.135, as amended from time to time, may contain limitations on the part of a company to conduct business with the County. Submission of a response to this solicitation shall be subject to all procedural requirements contained within that statute including the submission of any required certification of eligibility to contract with the County. It shall be the responsibility of the company responding to this solicitation to concurrently review the current version of the statute and ensure it is compliant. To the extent a certification is required, it shall be provided on the form located at **Attachment E Vendor Certification Regarding Scrutinized Companies Lists**.

**A.19 LOBBYING**

After the issuance of any Request for Proposal, prospective Proposers, or any agent, representative or person acting at the request of such Proposer shall not contact, communicate with or discuss any matter relating in any way to the Request for Proposal with any officer, agent or employee of Manatee County other than the Purchasing Official or as directed in the Request for Proposal. This prohibition includes the act of carbon copying officers, agents or employees of Manatee County on email correspondence. This requirement begins with the issuance of a Request for Proposal, and ends upon execution of the final Contract or when the Proposal has been canceled. Violators of this prohibition shall be subject to sanctions as provided in the Manatee County Purchasing Code of Law Chapter 2-26.

**A.20 EQUAL EMPLOYMENT OPPORTUNITY**

In accordance with the provisions of Title VI of the Civil Rights Act of 1964 and Title 15, Part 8 of the Code of Federal Regulations, Manatee County hereby notifies all prospective Proposers that they will affirmatively ensure minority business enterprises will be afforded full opportunity to participate in response to this advertisement and will not be discriminated against on the grounds of race, color or national origin in consideration for an award of contract.

**A.21 AMERICANS WITH DISABILITIES ACT**

The Board of County Commissioners of Manatee County, Florida, does not discriminate upon the basis of any individual's disability status. This non-discrimination policy involves every aspect of the County's functions including one's access to, participation, employment, or treatment in its programs or activities. Anyone requiring reasonable accommodation for the **public meetings** specified herein (i.e. Information Conference or Proposal Opening), should contact the person named on the first page of this document at least twenty four (24) hours in advance of the activity to request accommodations.

**END SECTION A**

## **SECTION B: SCOPE OF SERVICES**

### **B.01 BACKGROUND INFORMATION**

Manatee County is a mid-size Florida county located on the southwest coast and consists of 150 miles of coastline, 741 square miles of land, 311,000 residents, and attracts more than 2 million visitors every year.

The Bradenton Area Convention & Visitors Bureau (BACVB), known as Bradenton, Anna Maria Island- Longboat Key on Florida's Gulf Islands, requires Professional Tourism Inquiry and Fulfillment Services on an annual basis for a period of three (3) years with option of two (2) one (1) year renewals.

The BACVB, which is funded by the tourism tax levied on overnight stays, also known as the "Bed Tax," plays a vital role in growing the delicate but resilient tourism base in the destination, Manatee County. BACVB works with all partners in the destination, Manatee County, who interact with visitors on a daily level. BACVB is in daily contact with hotels and area attractions to make Manatee County alluring to the visitor to spend their vacation time in County with the ultimate goal of making a positive economic impact.

The successful Proposer shall provide live operator inquiry service through the BACVB toll free 800 numbers and website twenty-four (24) hours a day, seven (7) days a week, three hundred sixty-five (365) days per year. The live operator services shall be provided on a multi-lingual basis to include, at a minimum, English and Spanish. The successful Proposer shall also receive inquiries directly from publications in which BACVB advertises.

BACVB is committed to maintaining a premiere tourism destination. The objective shall be to increase tourism in Manatee County by providing potential visitors with content rich, reliable information with easy to use travel planning tools that will encourage visitation and longer stays.

### **B.02 SPECIFIC SCOPE OF SERVICES**

The successful Proposer shall provide a turn-key, full service operation to include, but not be limited to, staff, work space, equipment, software, telephones, all computer and telephone related lines and cable. The successful Proposer shall be responsible for the installation of the cable/wire at the facility.

The successful Proposer shall perform the following types of service including, but not limited to:

- Inbound and Outbound Live Operator Services
- Service and product information
- Scripted information dissemination
- Mailing of literature and information requests
- Data entry of information
- Data export of soft leads to web provider
- Electronic Fulfillment for e-guides/brochures
- Bilingual service
- Voice mail
- Email correspondence
- Call center overflow capabilities
- Handling surveys and questionnaires.

The successful Proposer shall have the ability to receive and respond to e-mail messages, instant messaging, and online forums. The call center system shall be compatible with TTY service for the hearing impaired. The system shall also allow the BACVB access to on-site as well as on-line monitoring of the staff.

The successful Proposer shall handle mail services such as forms and informational brochures.

The successful Proposer shall operate the call center and fulfillment system in accordance with all federal, state, and local laws and regulations.

### **B.02.1 Inquiry Services**

The successful Proposer shall provide the following services:

- a. Establish scripts for telephone and data entry as specified and approved by the BACVB.
- b. Provide toll-free numbers as requested by the BACVB. The toll-free numbers will become the property of the BACVB. All toll-free calls will be routed to the successful Proposer's twenty-four (24) hour call center for telephone response.
- c. Respond to calls from all toll-free numbers; catalog the source of the call by identifying the toll free number used by querying the caller.
- d. Respond to callers questions regarding the area, its' accommodations and attractions based upon information provided by the BACVB.
- e. Record the callers' names, addresses, e-mail addresses, phone number and other demographic information as specified by the BACVB.
- f. Establish the capability to receive the BACVB Visitor Guide requests directly from the publications in which the BACVB advertises. Maintain a relationship with the publications to insure timely and accurate receipt of requests and maximize the number of requests which are received in electronic files.
- g. Establish an individual email address for inquiries from reader response cards and email inquiries.
- h. Enter all reader responses, email inquiries, and website leads into the BACVB database. Files will be imported into the database. Text information will be manually entered. All entries will be completed within three (3) business days of receipt.
- i. Respond to email questions from the BACVB's website as requested by the BACVB.

### **B.02.2 Quality Assurance Program**

The successful Proposer shall develop and maintain a customer satisfaction program to include such measures as reliability, prompt service, and customer problem resolution.

### **B.02.3 Incentive Management Program**

The successful Proposer shall develop and maintain an incentive program to include such goals as call handling efficiency, maintaining a low employee turnover rate, and increasing the caller satisfaction rates.

### **B.02.4 Fulfillment Services**

The successful Proposer shall provide the following services:

- a. Establish a fulfillment capability utilizing modern mailing software.
- b. Establish a BACVB specific mailing indicia.
- c. Download all BACVB Visitor Guide requests into the successful Proposer's mailing software.
- d. Fulfill BACVB Visitor Guide requests a minimum of twice weekly based on volume. Utilize the least costly postage whenever possible, automated presort standard for domestic use, and ISAL for international use.
- e. Fulfillment includes insertion and sealing or tabbing as necessary, direct imprinting or labeling, banding and traying, and delivering the mail to a local US Postal Facility. International fulfillment requires mailing of BACVB Visitor Guides in an envelope, or best practices established by the USPS.
- f. Provide a fax broadcast or e-mail blasts as requested by the BACVB.
- g. Provide miscellaneous fulfillment requests as requested by the BACVB, including postcards mailing and newsletters.
- h. Maintain at least a ninety (90) day supply of BACVB Visitor Guides and fulfillment materials in air conditioned warehouse space. Report on inventory monthly.
- i. Electronic Delivery of BACVB e-guides/brochures

### **B.02.5 Telefax Capability**

The successful Proposer shall incorporate telefax capabilities as a means to respond to the caller.

### **B.02.6 Personnel Staffing**

The successful Proposer shall provide and adjust staff levels to service the volume of calls as anticipated by BACVB. Staffing shall consist, at a minimum, of the following:

**Account Manager** - shall be the chief point of contact and shall be responsible for managing the BACVB programs on a regular basis by interfacing with internal staff and technical staff to ensure responsiveness and program objectives are met.



**Supervisor** - shall be responsible for, at a minimum, floor supervision, ongoing training, daily monitoring and quality performance.

**Telephone Personnel**- shall be responsible for representing the BACVB by answering its toll free lines, obtaining and providing information regarding BACVB programs and provide quality customer service. Personnel shall possess professional telephone etiquette, voice quality, and interact spontaneously with mental agility and enthusiasm. Shall have the knowledge and skills to respond professionally to a variety of interactions including, but not limited to, e-mail messages, instant messaging, and online forums.

The successful Proposer's line supervisors shall monitor a minimum of ten percent (10%) of all calls received for quality control. A monthly report of recorded results shall be submitted to the BACVB.

#### **B.02.7 Security**

The Successful Proposer shall establish a secure environment for the processing of all data and information to reduce an information security risk.

#### **B.02.8 System Requirements**

The successful Proposer's call center system shall use commonly acceptable industry-wide compression protocols to transfer all data from the successful Proposer to the BACVB. The system shall support the archiving, retrieval, and purging of all appropriate data. The system shall also prevent the duplication of records.

#### **B.02.9 Disaster Recovery**

The successful Proposer shall have a disaster recovery plan to protect against possible service interruption due to an emergency event. The call center operations shall be up and running within forty-eight (48) hours of the emergency event.

The successful Proposer shall have in place process and procedures for restoring service for situations where a reported service interruption cannot be resolved within four (4) hours and for services that cannot be restored within forty-eight (48) hours. Service transfer capabilities and the lag time to implement shall be described for both type of service outage scenario.

The successful Proposer shall have in place process and procedures for Storm/Accommodation Hotline Service to communicate accommodation availability in Manatee County directly to the BACVB throughout the emergency related event.

#### **B.02.10 Transition Plan**

The successful Proposer shall provide a detailed description of the plan for executing the transition operations from the incumbent contractor to the successful Proposer

**B.03 PROJECT CONTROL - REPORTING REQUIREMENTS**

The successful Proposer shall provide the following standard monthly reports from data collected from callers and electronic requests:

- a. **Calls by Day** – a report showing the number of calls answered for the current month by day, number of complete calls, and number of information calls, total calls, total minutes and average minutes per call. Complete calls are those calls where information received from the caller is saved to the system database. Information calls are calls where caller data was not obtained or stored, beyond call disposition time, and date.
- b. **Calls by Month** – a report listing each call received during current month by date, time of day, and length of time in minutes and seconds.
- c. **Hourly Call Summary** - a monthly report showing total number of calls received by hour of day broken down by completed calls and information calls.
- d. **Calls by State, Zip Code, or Country Summary** – a report showing the total number of calls received by state, zip code, and country for the current month.
- e. **Monthly Report on Key Performance Indicators** – a summary report that identifies, at a minimum, call response time, response time in mailing out the Visitor's Guide, and the number of calls that resulted in area bookings in lodging, dining, and other recreational activities.
- f. **Monthly Publication Report** – a summary report that identifies where a caller saw the advertisement to call the 800 number or publication from which leads are received.
- g. **Monthly Quality Control Report** – a summary of quality control results of the monitoring of telephone personnel.
- h. **Weekly Export of Database Leads** – provided to the designated BACVB web provider

**END SECTION B**

## **SECTION C: FORM OF PROPOSAL**

This section identifies specific information which must be contained within each proposal. The contents of each proposal shall be **separated** and **arranged with tabs** in the same order as listed in **Sections C.01, through C.03**, identifying the response to each specific item.

The information that you provide shall be used to determine those Proposers with perceived ability to perform the Scope of Services as stated in this Request for Proposal which may overall best meet the needs of Manatee County. A review with those Proposers reasonably susceptible of being selected for award may be conducted for the purposes of clarification of both ability and benefit to Manatee County. See Section D. Selection.

### **C.01 MINIMUM QUALIFICATIONS (Licensing) TO BE CONSIDERED**

To qualify for any consideration, the Proposer(s) must present proof of any licensing or certification which will be required by law to perform the services set out in the scope of services required in this RFP.

Proposals may be presented by a single business entity, a joint venture, or partnership.

Prior to any consideration of the responses to the criteria in this Request for Proposal, Proposers are to document in their Proposals they have the following experience:

#### **MINIMUM EXPERIENCE TO BE CONSIDERED**

Proposers shall have substantial, current and verifiable experience in performing or overseeing the performance of the Professional Tourism Inquiry and Fulfillment Services that are similar in complexity and nature described within the scope of services set forth herein for the last three (3) years. In the event more than one entity is joining in making this proposal, each entity shall set forth its respective experience and qualifications for those areas the entity intends to perform.

If subcontractors are to be used in your proposal given to meet the minimum qualifications detail the business entities, description of the service provided, and responses in the same level of detail and tabbed order as instructed in this Request for Proposal for the Proposer.

### **MINIMUM EXPERIENCE TO BE CONSIDERED (Continued)**

To validate experience, expertise and capabilities, Proposers shall provide the following details for each of the Proposer(s)' relevant past performance of similar projects:

- a. Name and location of the Client and the project, the year of performance and the date the project was fully operational and accepted. The specific details of the project including the components and subcontractors utilized.

Specify the name, title and telephone number for the Clients contract manager for the project;

- b. Names of your firm's staff and their direct involvement in the project;
- c. Names and telephone numbers of the persons representing the individual agencies with which the identified key staff directly worked; and
- d. Governmental agency, if any, which verified compliance with its requirements or standards, and the names and telephone numbers of the key persons with direct knowledge of this process to achieve compliance.

After Manatee County staff validates the Minimum Qualifications have been met, those Proposals found to be in compliance will be considered by the evaluation committee.

### **C.02 ADMINISTRATIVE SUBMITTAL**

- a. Proposal Signature Form (Attachment A).
- b. Public Contracting and Environmental Crimes Certification (Attachment B).

### **C.03 INFORMATION TO BE SUBMITTED REGARDING PROPOSER(S)**

Note: Tabs are required to identify each item defined in this Section.

- C.03.1 Provide a description of each Proposers' **background and size**. Provide a general statement of qualifications to include Proposers' professional credentials, legal status, and experience in providing the service enumerated in this Request for Proposal.
- C.03.2 Proposer shall clearly demonstrate experience and ability. Provide a minimum of five (5) references of similar services within the past five (5) years. The name, address, telephone number, and email address of previous clients along with brief description of service.
  - a. Provide a list of three (3) call centers that your firm has staffed and operated with particular emphasis in the travel industry. Include the client's address, contact person, address, and telephone number.

- b. Provide your firm's current call center operational capacity including the number of full-time and part-time call center staff, current hours of operation, and call volume for the last twelve (12) month period.
- c. Describe your firm's call tracking system including all data elements, workflow capabilities, and security features that are required to meet the minimum requirements as outlined in this Request for Proposal
- d. Demonstrate your firm's ability to handle mail services such as forms and informational brochures.
- e. Provide a description of the facilities that your firm will use to provide the services under this Request for Proposal; include all telephone and data lines as well as the address and floor plan layout of the site.
- f. Provide your firm's proposed disaster recovery plan describing in detail how services can be resumed within forty-eight (48) hours of a disaster.
- g. Describe your firm's staff training for meeting the minimum requirements as outlined in this Request for Proposal.

C.03.3 Provide an **explanation of the Proposers' legal capacity** to perform all parts of the scope of services. Include a description of corporate or other structure and governance, and detail the legal, financial, and technical capabilities of Proposer(s) relevant to performing the scope of services. If more than one Proposer is teaming up to file a proposal, any prior work any two or more joint proposers have done before should be detailed.

C.03.4 Identify each **principal of the firm and other "key personnel"** who will be professionally associated with the County. Do not include personnel that will not have a key role in providing services. Describe their respective areas of expertise.

For each identified person, provide the following:

- Full Name
- Title
- Professional credentials
- Area of expertise, individual's roles and duties in providing services
- Office address
- Email address
- Telephone number
- Personalized resumes which identify the qualifications, training and experience of each key personnel

C.03.5 Disclose **any ownership interest in other entities** involved in these services which might reasonably be selected to perform work under the scope of services set forth in this Request for Proposal. This ownership



disclosure shall be included, whether such ownership occurs by the Proposer through a parent, subsidiary or holding company or any other form of business entity. Submit entity names and the percent of ownership for each.

- C.03.6 Submit a **manning level statement** for your organization, detailing how many total employees work for your firm at any one time, including temporary and part-time employees. List the ratio of full-time employees to part-time, and temporary employees. Also include a **subcontractor plan** detailing how subcontractors will be used.
- a. Provide your firm's current call center operational capacity including the number of full-time and part-time call center staff, current hours of operation, and call volume for the last twelve (12) month period.
- C.03.7 **Provide authorization for a Manatee County auditor and/or financial analysts to have access to your financial records at the primary location of the business entity** explained in response to item C.03.5, or such other location as may be agreed, for the purposes of verifying your financial representations, review and assessment of the historical and current financial capacity of your business entity and its expected ability to meet ongoing financial obligations to the County as proposed in this proposal to Manatee County. The County's audit and /or financial analyst agents will report their findings in a summary report to the Manatee County Purchasing Official, which will be placed in the proposal files for subsequent use and review.
- C.03.8 Submit a narrative **explaining the direct economic benefit to Manatee County to be realized by selecting your firm.** During the term of this engagement detail the revenue maximizing activities, employment, subcontracting, and support services contracting as economic stimulus that your entity may generate that would directly benefit Manatee County.
- C.03.9 **Customer Service Commitment**  
Submit a statement of customer service commitment with demonstration of your business entities experience in successfully implementing an effective customer service program. List prior customer service models that you have had direct responsibility for managing and examples of how customer satisfaction feedback was obtained by survey for those specific programs that you managed.

**C.03.10 Marketing and Advertising**

Detail your proposed marketing and advertising plans, including methodologies, media to be used, and schedules. The costs of the proposed marketing and advertising are to be shown separately in the projected budget.

- C.03.11 Submit a detailed **Quality Assurance Statement** to demonstrate the level of quality that is being proposed will either meet or exceed current quality standards for the work outlined in this Request for Proposal.

**C.03.12 Environmental Sustainability**

All proposers are encouraged to use as many environmentally preferable "green" products, materials, supplies, etc. as possible in order to promote a safe and healthy environment. Environmentally preferable are products or services that have a reduced adverse effect on the environment.

In addition, the proposer will submit a summary of their environmental sustainability initiative along with their proposal. This information will be used as a determining factor in the award decision when all other evaluative factors, including local preference policies are otherwise equal.

- C.03.13 Provide your **proposed cost that is all-inclusive** for the required hardware, software, installation (travel and per diem), training, maintenance and system upgrades in accordance with the requirements stated in the Scope of Service. Include any additional items that you foresee being needed during the performance of this project.

The cost proposal shall include each of the following:

- a. A monthly fee inclusive for all tourism inquiry and fulfillment services as described in this Request for Proposal; and,
- b. All necessary labor categories and corresponding labor rates. All hourly rates and fees, charges, costs, and anticipated reimbursable costs shall be clearly stated.

- C.03.14 Include a statement of qualifications that includes Proposer's credentials and experience in providing, operating and maintaining Professional Tourism Inquiry and Fulfillment Services.

- C.03.15 Submit any other additional information which would assist the County in the evaluation of your proposal.

**END SECTION C**

## **SECTION D: SELECTION**

### **D.01 EVALUATION FACTORS**

Evaluation of proposals will be conducted by an evaluation committee. The committee's goal will be to identify the proposal which will overall best meet the needs of Manatee County as determined from the proposals received and subsequent investigation by the County. General factors to be applied will be: (1) the perceived ability of the Proposer(s) to perform the Scope of Services as stated in this Request for Proposal in the most timely and efficient manner possible, (2) the legal, technical and financial capabilities of Proposer(s), and (3) the experience of Proposer(s).

These evaluation factors shall determine the successful proposal.

### **D.02 RELATIVE IMPORTANCE OF EVALUATION FACTORS**

Unless noted, no weight will be assigned to the Evaluation Factors stated above.

### **D.03 PRELIMINARY RANKING**

An evaluation committee shall determine from the responses to this Request for Proposal and subsequent investigation as necessary, the Proposer(s) most qualified to be selected to negotiate an agreement.

### **D.04 REVIEW OF PROPOSERS AND PROPOSALS**

In-person reviews may be conducted with responsible Proposers who are deemed reasonably susceptible of being selected for award, for the purposes of assuring full understanding of: (a) conformance to the solicitation requirements, (b) the abilities of the Proposer, and (c) the proposal submitted.

Proposers shall be available for presentations to and interviews with the evaluation committee, upon reasonable notification from the Purchasing Division. The date(s) and time(s) of any such presentations / interviews shall be determined solely by the County, and may be closed to the public in the discretion of the Purchasing Official, and to the extent permitted by law.

### **D.05 SELECTION FOR NEGOTIATION**

The evaluation committee will make a recommendation to the County Administrator as to the proposer which the County should enter into negotiations. The County Administrator will act upon that recommendation and, if accepted, the successful Proposer will be invited to enter negotiations led by the Purchasing Division.

**D.06 AWARD**

Award of an agreement is subject to the successful negotiations and the approval of either the County Administrator or the Board of County Commissioners (as provided for in the current Purchasing Code and Procurement Procedures).

**END SECTION D**

## **SECTION E: NEGOTIATION OF THE AGREEMENT**

### **E.01 GENERAL**

The following general terms and conditions apply to the proposal submitted for consideration and the subsequent negotiations:

- a. The proposal will serve as a basis for negotiating an agreement, but not compel adherence to its terms or conditions.
- b. Upon submission, all proposals become the property of the County which has the right to use any or all ideas presented in any proposal submitted in response to this Request for Proposal whether or not the proposal is accepted.
- c. All products and papers produced in the course of this engagement become the property of the County upon termination or completion of the engagement.

### **E.02 AGREEMENT**

The selected Proposer shall be required to negotiate an agreement, in a form and with provisions acceptable to Manatee County.

Negotiated Agreements may or may not include all elements of this RFP or the resulting successful proposal where alternative terms or conditions become more desirable to the County, and the parties agree to such terms.

The parties will negotiate the term of the agreement, and the circumstances in which it may be renewed, assigned or terminated.

The parties will negotiate matters of insurance, liability, record-keeping, auditing, and all other relevant contractual matters.

**END SECTION E**



## ATTACHMENT A

### PROPOSAL SIGNATURE FORM RFP #1

The undersigned represents that by signing the proposal, that he/she has the authority and approval of the legal entity purporting to submit the proposal, and that all of the facts and responses set forth in the proposal are true and correct. If the proposer is selected by the County to negotiate an agreement, the undersigned certifies that the proposer's negotiators will negotiate in good faith to establish an agreement to provide the services described in the Scope of Services of this Request for Proposal.

Print or Type Proposer's Information Below:

\_\_\_\_\_  
Name of Proposer

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

\_\_\_\_\_  
Street Address

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

\_\_\_\_\_  
Web Address

\_\_\_\_\_  
Print Name & Title of Authorized Officer

\_\_\_\_\_  
Signature of Authorized Officer

\_\_\_\_\_  
Date Signed

Acknowledge Addendum No. _____	Dated: _____
Acknowledge Addendum No. _____	Dated: _____
Acknowledge Addendum No. _____	Dated: _____

## ATTACHMENT B

### PUBLIC CONTRACTING AND ENVIRONMENTAL CRIMES CERTIFICATION

#### SWORN STATEMENT PURSUANT TO ARTICLE V, MANATEE COUNTY PURCHASING CODE

THIS FORM MUST BE SIGNED AND SWORN TO IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICIAL AUTHORIZED TO ADMINISTER OATHS.

This sworn statement is submitted to the Manatee County Board of County Commissioners by \_\_\_\_\_.  
[print individual's name and title]

\_\_\_\_\_ For \_\_\_\_\_  
[name of entity submitting sworn statement]

whose business address is: \_\_\_\_\_

and (if applicable) its Federal Employer Identification Number (FEIN) is \_\_\_\_\_. If the entity has no FEIN, include the Social Security Number of the individual signing this sworn statement:

I understand that no person or entity shall be awarded or receive a county contract for public improvements, procurement of goods or services (including professional services) or a county lease, franchise, concession or management agreement, or shall receive a grant of county monies unless such person or entity has submitted a written certification to the County that it has not:

(1) been convicted of bribery or attempting to bribe a public officer or employee of Manatee County, the State of Florida, or any other public entity, including, but not limited to the Government of the United States, any state, or any local government authority in the United States, in that officer's or employee's official capacity; or

(2) been convicted of an agreement or collusion among bidders or prospective bidders in restraint of freedom of competition, by agreement to bid a fixed price, or otherwise; or

(3) been convicted of a violation of an environmental law that, in the sole opinion of the County's Purchasing Director, reflects negatively upon the ability of the person or entity to conduct business in a responsible manner; or

(4) made an admission of guilt of such conduct described in items (1), (2) or (3) above, which is a matter of record, but has not been prosecuted for such conduct, or has made an admission of guilt of such conduct, which is a matter of record, pursuant to formal prosecution. An admission of guilt shall be construed to include a plea of nolo contendere; or

(5) where an officer, official, agent or employee of a business entity has been convicted of or has admitted guilt to any of the crimes set forth above on behalf of such and entity and pursuant to the direction or authorization of an official thereof (including the person committing the offense, if he is an official of the business entity), the business shall be chargeable with the conduct herein above set forth. A business entity shall be chargeable with the conduct of an affiliated entity, whether wholly owned, partially owned, or one which has common ownership or a common Board of Directors.

For purposes of this Form, business entities are affiliated if, directly or indirectly, one business entity controls or has the power to control another business entity, or if an individual or group of individuals controls or has the power to control both entities. Indicia of control shall include, without limitation, interlocking management or ownership, identity of interests amount family members, shared organization of a business entity following the ineligibility of a business entity under this Article, or using substantially the same management, ownership or principles as the ineligible entity.

Any person or entity who claims that this Article is inapplicable to him/her/it because a conviction or judgment has been reversed by a court of competent jurisdiction, shall prove the same with

documentation satisfactory to the County's Purchasing Director. Upon presentation of such satisfactory proof, the person or entity shall be allowed to contract with the County.

I UNDERSTAND THAT THE SUBMISSION OF THIS FORM TO THE CONTRACTING OFFICER FOR MANATEE COUNTY IS VALID THROUGH DECEMBER 31 OF THE CALENDAR YEAR IN WHICH IT IS FILED. I ALSO UNDERSTAND THAT ANY CONTRACT OR BUSINESS TRANSACTION SHALL PROVIDE FOR SUSPENSION OF PAYMENTS, OR TERMINATION, OR BOTH, IF THE CONTRACTING OFFICER OR THE COUNTY ADMINISTRATOR DETERMINES THAT **SUCH PERSON OR ENTITY HAS MADE FALSE CERTIFICATION.**

\_\_\_\_\_  
[Signature]

STATE OF FLORIDA  
COUNTY OF \_\_\_\_\_

Sworn to and subscribed before me this \_\_\_\_\_ day of \_\_\_\_\_, 200\_\_\_\_ by\_\_\_\_\_.

Personally known \_\_\_\_\_ OR Produced identification \_\_\_\_\_  
[Type of identification]

\_\_\_\_\_  
Notary Public Signature      My commission expires\_\_\_\_\_.

\_\_\_\_\_  
[Print, type or stamp Commissioned name of Notary Public]

**Signatory Requirement -** In the case of a business entity other than a partnership or a corporation, this affidavit shall be executed by an authorized agent of the entity. In the case of a partnership, this affidavit shall be executed by the general partner(s). In the case of a corporation, this affidavit shall be executed by the corporate president.