



**Procurement Division**  
Public Services Building  
2051 Kaen Road  
Oregon City, OR 97045  
(503) 742-5444 (Office)

## **REQUEST FOR QUOTES (RFQ) #2017-40**

Issue Date: May 23, 2017

Project Name:	Tourism Mailing & Database Management Services		
Quote Due Date/Time:	June 6, 2017, 2:00 PM		
Analyst:	Patricia Bride	Phone:	(503) 742-5447
		Email:	<a href="mailto:pbride@clackamas.us">pbride@clackamas.us</a>

**SUBMIT QUOTES VIA EMAIL TO [PROCUREMENT@CLACKAMAS.US](mailto:PROCUREMENT@CLACKAMAS.US)  
OR MAIL/HAND DELIVERY TO THE ABOVE ADDRESS**

**PLEASE NOTE: EMAIL SUBMISSIONS SHOULD HAVE  
“TOURISM MAILING & DATABASE MANAGEMENT SERVICES” IN THE SUBJECT  
LINE**

### **1. ANNOUNCEMENT AND SPECIAL INFORMATION**

Quoters are required to read, understand, and comply with all information contained within this Request for Quotes (“RFQ”). All quotes are binding upon Quoter for one hundred twenty (120) days from the Quote Due Date/Time. Quotes received after the Quote Due Date/Time may not be considered. If authorized in the RFQ and resulting contract, travel and other expense reimbursement will only be reimbursed in accordance with the Clackamas County travel reimbursement policy in effect at the time the expense is incurred.

It will be the responsibility of potential Quoters to refer daily to the Bids and Contract Information Page ([www.clackamas.us/bids/index.html](http://www.clackamas.us/bids/index.html)) to check for any available addenda, response to clarifying questions, cancellations or other information pertaining to this RFQ.

### **2. SCOPE**

#### **Background**

Clackamas County Tourism & Cultural Affairs (“CCTCA”) is the recognized Destination Marketing Organization (“DMO”) for Clackamas County, branded as Oregon's Mt. Hood Territory (“OHMT”). The mission of CCTCA is to increase overnight stays and encourage visitors to linger longer in Clackamas County. CCTCA accomplishes this by serving as the primary entity within the county responsible for destination brand awareness and development, inspiring potential visitors, and for providing trip planning tools and information for travelers in Clackamas County and the region. Tourism works in partnership with members of the industry and with communities to develop and enhance local tourism assets and experiences. This department works to balance the interests of visitors, businesses, other organizations, and government through innovative leadership and strategic investment of resources and staff.

The CCTCA tourism program is funded by tax dollars generated from a county-wide transient room tax (“TRT”) of 6%. The amount of funding available for any given period varies with the lodging occupancy and room rate. These tax dollars are to be used for the development and promotion of tourism in Clackamas County. The Tourism Development Council (“TDC”) is a nine-member advisory group appointed by the Clackamas County Board of Commissioners to advise and oversee the program/budget of CCTCA.

It is also important to note that CCTCA is a participant in state tourism programs through Travel Oregon and their Regional Cooperative Tourism Program (“RCTP”). CCTCA has been placed in

three of the seven regions – Willamette Valley, Greater Portland, and Mt. Hood/Gorge. We are partners in each region in marketing and development plans that are funded by a portion of the state lodging tax of 1.8%.

### **Scope of Work**

CCTCA is seeking a contractor to perform the below services related to fulfilling advertising requests, storing printed materials and maintaining the database of inquiries for both CCTCA and Mt. Hood/Gorge region. The resulting contract from this RFQ will be for three (3) years ending June 30, 2020. The contract pricing will be firm throughout the term of the contract.

**Task 1:** Input into database the name, address, telephone number, e-mail address, publication source code, and coded for regional and interest information for each inquiry forwarded to fulfillment service - about 40,000 new names per year. Receive inquiries from multiple sources: mostly electronic but some email, fax and postcard. Receive inquiries for both CCTCA and Mt. Hood/Gorge region and code them separately. The current database contains approximately 100,000 names.

**Task 2:** Prepare requested information for mail by deduping, inserting in an envelope supplied by the customer, labeling and affixing postage required - bulk mail rate when 200 pieces in work week are sent, otherwise first class - about 35,000 per year - this is the estimated number of inquiries answered per year - some inquiries request multiple brochures most just receive the 8 1/2 x 11 travel planner, regional guide, and insert card.

**Task 3:** CCTCA inquiries outside the West coast region are sent a reply return postcard that is supplied by the customer, approximately 10,000 per year.

**Task 4:** Deliver to post office or shipping center at least one time per week - bulk mail or 1st class.

**Task 5:** Prepare for shipping bulk orders of both CCTCA and Mt. Hood/Gorge region brochures as requested - about 2-4 times a month (varies by season). The shipments are typically in one full case lots.

**Task 6:** Store in secured and insured storage, quantities of boxed, printed materials - about 100,000 pieces annually. The material ranges from magazine size to rack brochure size. The cartons usually weigh 25-30 lbs. Recycling of outdated brochures as needed and requested.

**Task 7:** Prepare a monthly database report of received email contacts and submit to CCTCA staff the spreadsheet for uploading contacts into the consumer newsletter database for monthly distribution.

**Task 8:** Perform semiannual cleaning of database for duplicate entries/postal CASS review and weekly or monthly cleaning from returned/unable to forward mail.

**Task 9:** Prepare monthly reports for CCTCA - one by publication source code, one by duplicates removed, one by state of origin, one by interest information, one by regional requests, one by response card, one for bulk mailings, one for brochure inventory, and special reports as required for research studies.

**Task 10:** Prepare a monthly report for Mt. Hood/Gorge region – either incorporated into the monthly reports for CCTCA as outlined in Task 9, or a separate tracking report specific for Mt. Hood/Gorge region tracking.

**Task 11:** Sort database by requested categories for special mailings (only if requested for direct mail). Prepare and send a reply return postcard supplied by the customer, similar to duties performed in Task 3, only as directed.

**Task 12:** Sort database by requested categories for special mailing lists as requested by tourism partners, such as a list for all bed & breakfast inquiries – about 1-2 such database reports per year provided in Excel file ready for transferring to mailing labels.

A sample digital packet of literature can be located at: [Travel Planner](#), [Mt. Hood/Gorge Visitor Guide](#), [Insert Card](#), [Out of Market Postcard](#).

## **RESPONSE REQUIREMENTS**

Quoters will need to provide the following information in their quotes in the order in which they appear below.

### **Project understanding and approach**

- Describe your understanding of projects of this type.
- Detail the factors affecting the success of completing the tasks identified in the Scope of Work.
- Describe how the County's project will affect your current production schedule and the approach that you will use to integrate the County's project into the schedule.
- Describe the steps that will be taken to prioritize the County's work.
- Describe your quality control measures.

### **Qualifications**

- Describe your experience in providing mailing, fulfillment, and database management services similar to those outlined in the scope of work.
- Detail the facilities availability for processing requests for the County's literature and information.

### **References**

- Provide contact names, telephone numbers, and email addresses for at least three (3) clients that you are providing or have provided services for similar in size and scope to the County's project.

### **Cost/Fees**

Complete Attachment A – Cost Detail Sheet.

***Note:** Costs for postage should not be included in the proposal response. Postage will be handled as a reimbursable expense to the Quoter without markup. The Quoter will provide proof of actual postage expenses at time of reimbursement request.*

## **3. Quote**

Quotes should be short and concise with the following information:

- A. Project understanding and approach;
- B. Qualifications;
- C. References; and
- D. Cost/Fee Schedule
- E. Any additional information that Clackamas County should take into consideration for the project or qualifications.

## **4. Evaluation**

Quotes will be evaluated based on subjective factors including, but not limited to: Project understanding and approach, qualifications, references, Cost/Fee Schedule, and proposal.

**CLACKAMAS COUNTY CERTIFICATIONS**  
**RFQ #2017-40**

Each Quoter must read, complete and submit a copy of this Clackamas County Certification with their Quote. Failure to do so may result in rejection of Quote. By signature on this Certification the undersigned certifies that they are authorized to act on behalf of the Quoter and that under penalty of perjury the undersigned will comply with the following:

**SECTION I. OREGON TAX LAWS**

As required in ORS 279B.110(2)(3), the undersigned hereby certifies that, to the best of the undersigned's knowledge, the Quoter is not in violation of any Oregon Tax Laws. For purposes of this certification, "Oregon Tax Laws" means a state tax imposed by ORS 320.005 to 320.150 and 403.200 to 403.250 and ORS chapters 118, 314, 316, 317, 318, 321, 323, and elderly rental assistance program under ORS 310.630 to 310.706, and local taxes administered by the Department of Revenue under ORS 305.620, all as applicable. If a contract is executed, this information will be reported to the Internal Revenue Service. Information not matching IRS records could subject Quoter to 28% backup withholding.

**SECTION II. NON-DISCRIMINATION**

The undersigned hereby certifies that the Quoter has not and will not discriminate in its employment practices with regard to race, creed, age, religious affiliation, sex, disability, sexual orientation, national origin, or any other protected class. Nor has Quoter or will Quoter discriminate against a subcontractor in the awarding of a subcontract because the subcontractor is a disadvantaged business enterprise, a minority-owned business, a woman-owned business, a business that a service-disabled veteran owns or an emergency small business that is certified under ORS 200.055.

**SECTION III. CONFLICT OF INTEREST**

The undersigned hereby certifies that no elected official, officer, agency or employee of Clackamas County is personally interested, directly or indirectly, in any resulting contract from this RFQ, or the compensation to be paid under such contract, and that no representation, statements (oral or in writing), of the County, its Commissioners, officers, agents, or employees had induced Quoter to submit this Quote. In addition, the undersigned hereby certifies that this proposal is made without connection with any person, firm, or corporation submitting a quote for the same material, and is in all respects fair and without collusion or fraud.

**SECTION IV. COMPLIANCE WITH SOLICITATION**

The undersigned further agrees and certifies that they:

1. Have read, understand and agree to be bound by and comply with all requirements, instructions, specifications, terms and conditions of the RFQ (including any attachments); and
2. Are an authorized representative of the Quoter, that the information provided is true and accurate, and that providing incorrect or incomplete information may be cause for rejection of the Quote or contract termination; and
3. Will furnish the designated item(s) and/or service(s) in accordance with the RFQ and Quote; and
4. Will use recyclable products to the maximum extent economically feasible in the performance of the contract work set forth in this RFQ.

Firm Name: \_\_\_\_\_ Date: \_\_\_\_\_

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

Name: \_\_\_\_\_ Telephone: \_\_\_\_\_

Email: \_\_\_\_\_ OR CCB # (if applicable): \_\_\_\_\_

Business Designation (check one):

☐ Corporation ☐ Partnership ☐ Sole Proprietorship ☐ Non-Profit ☐ Limited Liability Company

☐ Resident Quoter, as defined in ORS 279A.120

☐ Non-Resident Quote. Resident State: \_\_\_\_\_

Oregon Business Registry Number: \_\_\_\_\_

## CLACKAMAS COUNTY INSTRUCTIONS TO QUOTERS

Quotes are subject to the applicable provisions and requirements of the Clackamas County Local Contract Review Board Rule C-047-0270 (Intermediate Procurements) and Oregon Revised Statutes.

### QUOTE PREPARATION

1. **QUOTE FORMAT:** Quotes must be submitted as indicated in the RFQ. Quotes may be submitted in writing to Clackamas County via e-mail, mail or in person.
2. **CONFORMANCE TO RFQ REQUIREMENTS:** Quotes must conform to the requirements of the RFQ. Unless otherwise specified, all items quoted are to be new, unused and not remanufactured in any way. Any requested attachments must be submitted with the quote and in the required format. Quote prices must be for the unit indicated on the quote. Failure to comply with all requirements may result in quote rejection.
3. **ADDENDA:** Only documents issued as addenda by Clackamas County serve to change the RFQ in any way. No other directions received by the Quoter, written or verbal, serve to change the RFQ document. NOTE: IF YOU HAVE RECEIVED A COPY OF THE RFQ, YOU SHOULD CONSULT THE CLACKAMAS COUNTY BIDS AND CONTRACT INFORMATION WEBSITE ([www.clackamas.us/bids/index.html](http://www.clackamas.us/bids/index.html)) TO ENSURE THAT YOU HAVE NOT MISSED ANY ADDENDA OR ANNOUNCEMENTS. QUOTERS ARE NOT REQUIRED TO RETURN ADDENDUMS WITH THEIR QUOTE. HOWEVER, QUOTERS ARE RESPONSIBLE TO MAKE THEMSELVES AWARE OF, OBTAIN AND INCORPORATE ANY CHANGES MADE IN ANY ADDENDA ISSUED, AND TO INCORPORATE ANY CHANGES MADE BY ADDENDUM INTO THEIR FINAL QUOTE. FAILURE TO DO SO MAY, IN EFFECT, MAKE THE QUOTER'S QUOTE NON-RESPONSIVE, WHICH MAY CAUSE THE QUOTE TO BE REJECTED.
4. **USE of BRAND or TRADE NAMES:** Any brand or trade names used by Clackamas County in the specifications are for the purpose of describing and establishing the standard of quality, performance and characteristics desired and are not intended to limit or restrict competition. Quoters may submit quotes for substantially equivalent products to those designated unless the RFQ provides that a specific brand is necessary because of compatibility requirements, etc. All such brand substitutions shall be subject to approval by Clackamas County.
5. **PRODUCT IDENTIFICATION:** Quoters must clearly identify all products quoted. Brand name and model or number must be shown. Clackamas County reserves the right to reject any quote when the product information submitted with the quote is incomplete.
6. **FOB DESTINATION:** Unless specifically allowed in the RFQ, ***QUOTE PRICE MUST BE F.O.B. DESTINATION with all transportation and handling charges included in the Quote.***
7. **DELIVERY:** Delivery time must be shown in number of calendar days after receipt of purchase order.
8. **EXCEPTIONS:** Any deviation from quote specifications, or the form of the Clackamas County Goods and Services Contract, may result in quote rejection at County's sole discretion.
9. **SIGNATURE ON QUOTE:** Quotes must be signed by an authorized representative of the Quoter. Signature on a quote certifies that the quote is made without connection with any person, firm or corporation making a quote for the same goods and/or services and is in all respects fair and without collusion or fraud. Signature on a quote also certifies that the Quoter has read and fully understands all quote specifications, and the Clackamas County Goods and Services Contract (including insurance requirements). No consideration will be given to any claim resulting from quoting without comprehending all requirements of the RFQ.
10. **QUOTE MODIFICATION:** Quotes, once submitted, may be modified in writing before the time and date set for quote closing. Any modifications should be signed by an authorized representative, and state that the new document supersedes or modifies the prior quote. Quoters may not modify quotes after quote closing time.
11. **QUOTE WITHDRAWALS:** Quotes may be withdrawn by request in writing signed by an authorized representative and received by Clackamas County prior to the Quote Due Date/Time. Quotes may also be withdrawn in person before the Quote Due Date/Time upon presentation of appropriate identification.

- 12. QUOTE SUBMISSION:** Quotes may be submitted by returning to Clackamas County Procurement Division in the location designated in the introduction of the RFQ via email, mail or in person; however, no oral or telephone quotes will be accepted. Envelopes, or e-mails containing Quotes should contain the RFQ Number and RFQ Title.

#### **QUOTE EVALUATION AND AWARD**

- 1. PRIOR ACCEPTANCE OF DEFECTIVE PROPOSALS:** Due to limited resources, Clackamas County generally will not completely review or analyze quotes which fail to comply with the requirements of the RFQ or which clearly are not the best quotes, nor will Clackamas County generally investigate the references or qualifications of those who submit such quotes. Therefore, neither the return of a quote, nor acknowledgment that the selection is complete shall operate as a representation by Clackamas County that an unsuccessful quote was complete, sufficient, or lawful in any respect.
- 2. DELIVERY:** Significant delays in delivery may be considered in determining award if early delivery is required.
- 3. CASH DISCOUNTS:** Cash discounts will not be considered for award purposes unless stated in the RFQ.
- 4. PAYMENT:** Quotes which require payment in less than 30 days after receipt of invoice or delivery of goods, whichever is later, may be rejected.
- 5. INVESTIGATION OF REFERENCES:** Clackamas County reserves the right to investigate references and or the past performance of any Quoter with respect to its successful performance of similar services, compliance with specifications and contractual obligations, and its lawful payment of suppliers, sub-contractors, and workers. Clackamas County may postpone the award or execution of the contract after the announcement of the apparent successful Quoter in order to complete its investigation. Clackamas County reserves the right to reject any quote or to reject all quotes at any time prior to Clackamas County's execution of a contract if it is determined to be in the best interest of Clackamas County to do so.
- 6. METHOD OF AWARD:** Clackamas County reserves the right to make the award by item, groups of items or entire quote, whichever is in the best interest of Clackamas County.
- 7. QUOTE REJECTION:** Clackamas County reserves the right to reject any and all quotes.
- 8. QUOTE RESULTS:** Quoters who submit a quote will be notified of the RFQ results. Awarded quote files are public records and available for review by submitting a public records request or by appointment.

## ATTACHMENT A – COST DETAIL SHEET

Task #	Frequency	Estimated Annual Volume	Unit Cost	Estimated Annual Cost
1	Per piece	40,000		
2	Per piece	35,000		
3	Per piece	10,000		
4	Weekly	52		
5	Bi-weekly	26		
6	Per piece	100,000		
7	Monthly	12		
8	Semi-annual	2		
9	Monthly	12		
10	Monthly	12		
11	Per piece	20,000		
12	As requested	2		
<b>Total Estimated Annual Costs</b>				