



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

REQUEST FOR QUOTES (RFQ) #2017-86

Issue Date: October 17, 2017

Project Name:	Content Management System and Customer Relations		
Quote Due Date/Time:	October 30, 2017, 2:00 PM		
Procurement Analyst:	Patricia Bride	Phone:	(503) 742-5447
		Email:	pbride@clackamas.us

**SUBMIT QUOTES VIA EMAIL TO PROCUREMENT@CLACKAMAS.US
OR MAIL/HAND DELIVERY TO THE ABOVE ADDRESS**

**PLEASE NOTE: EMAIL SUBMISSIONS SHOULD HAVE
“CONTENT MANAGEMENT AND CUSTOMER RELATIONS”
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 sixty (60) 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. The Policy may be found at www.clackamas.us/bids/terms.html.

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

All questions regarding this RFQ are to be directed to the Procurement Analyst named above. Quoters may not communicate with County employees or representatives about the RFQ during the procurement process until the Procurement office has notified Quoters of the selected Quoter. Communication in violation of this restriction may result in rejection of a Quoter.

2. SCOPE

Clackamas County is requesting quotes from qualified and interested multi-disciplinary agencies for professional services related to the development and implementation of an integrated enterprise Customer Relationship Management (“CRM”), Content Management System (“CMS”), and website development and management software for the Clackamas County Tourism & Cultural Affairs Department (“CCTCA”).

Background

CCTCA is the recognized Destination Marketing Organization (“DMO”) for Clackamas County, branded as Oregon’s Mt. Hood Territory (“OMHT”). 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 Lodging Tax (“TLT”) 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. The Cultural Affairs program includes alignment with the Clackamas County Arts Alliance.

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, Grater 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%.

Marketing Background

An effective destination marketing program demonstrates the ability to increase the awareness of the County’s visitor experiences through implementation of targeted and partner-based advertising, sales, and visitor service strategies resulting in increased visitor spending and increased occupancy/revenue per available room in commercial lodging facilities. The main objective in marketing is to deliver the OMHT brand message to reach our audience of local, regional, national, and international markets. Historically, our target audience is 24-65 year of age; predominately leisure visitors; and some business and special group travel. Our primary pillars of work include outdoor recreation, agritourism, and heritage/culture.

Historically, CCTCA’s marketing campaigns have included a mix of print advertising (leisure media, coop partnership program); out of home (bus kings, billboards); cinema; digital (banners, video, search engine marketing); social; media; and limited broadcast. Responding to the changing behaviors of consumers throughout the entire trip planning process, advertising focuses are changing to respond to these trends, with priority directed to digital to be consistent with consumer utilization of online resources for travel planning and to maximize marketing return on investment. CCTCA’s advertising call to action includes www.MtHoodTerritory.com (and #OMHT when appropriate) for consumer access, engagement, and inquiries, which are fulfilled with the annual Travel Planner (print and online view).

Marketing services covered under contracts with various vendors include a marketing agency of record, public relations, Search Engine Marketing and Search Engine Optimization, and website management. CCTCA employs staff to manage and deliver our public relations efforts in house, with deskside coordination assistance through a separate contract with a public relations firm. Social media strategies and community management are conducted and monitored through in-house staff. We employ a full-time person within the County Technology Services department and all website management is overseen through that staff person. The Content, Customer Relations, and website management contractor will work closely with the webmaster and all staff and contractors to assist in providing input and strategies that will enhance our website performance in addition to integrating their services with the marketing strategies of these aforementioned programs.

Scope of Work

CMS, CRM, and website development and management software for the CCTCA will be based on the 2017-2022 Master Plan, FY 2017-18 Business Plan, as well as the planning work documented in our previous Master Plans and Destination Audit. These documents are found online at: www.MtHoodTerritory.com/partners in the Document Center of the Partners’ Resources section. Budget funds have been allocated for this project.

The selected proposer will be responsible for the CMS, CRM, and website development which includes:

- Clearly understand that this is *not* a website user interface (“UI”) redesign, and can work with new design for a period of 3-5 years. At that future time the UI will be evaluated for redesign.
- Provide a cloud-hosted Customer Relationship, Content, and Website Management System.
- Work with the CCTCA staff to understand the operation complexities and configure CRM/CMS software to best fit their operational standards.

- Work with CCTCA webmaster to fully understand and adapt the website “backend” requirements with the newly redesigned UI.
- Provide a method for the CMS to update content on the website.
- Create and manage the implementation schedule and assist meeting or beating the project deadlines.
- Assist in importing data from the existing CRM/CMS system, if necessary.
- Build, facilitate or apply existing interfaces with other CCTCA systems as specified in subsequent requirements section.
- Implement and train CCTCA staff on software and processes.
- Provide ongoing maintenance and support.

Requirements

Functionality

- Provide tools to be able to manage website to include:
 - Website hosting
 - Image management
 - Search Engine Optimization (“SEO”) elements (such as meta tags and image tags) for site wide management as well as on a page by page basis
 - Easy to use templates that conform with and can be added to existing templates and management for a content driven design that allows for content formatting and HTML coding changes if needed
 - Simple page creation and navigation control
 - Management tools for the displaying of video
 - Able to integrate into the current “Finder” mapping design utilizing Google maps or other mapping tools
 - Able to sort content by categories
 - Easy to manage calendar of events
 - Site-wide content and partner search
 - Create secure forms as needed with exportable data (Excel preferred, or other reporting tools for complex forms)
 - All supporting assets on SSL, cookies set with “secure” attribute, and site using correct HTTPS URL
- Easy to use project and task management system
- Sales team information tracking
 - Conversation tracking
 - Multiple contacts per account
 - The ability to select multiple contacts easily for email communication
 - Track who edited the account (audit trail)
 - Tracking for contact interactions via email or phone
 - Simple way to create follow-up tasks for contacts
 - Mobile access to the site in the field
 - Solicitation/Donation tracking that allows easy reporting of value, how they were used, and where they are in the inventory
- Storage of contact database of partners, program participants, event attendees, and vendors. Have the ability to store relevant files (Microsoft Word, Excel, PDF, JPG, GIF, EPS), add notes, designate roles, organizational hierarchy, and view history.
- Sophisticated permissions management – enabling detailed controls for user access and edit capability.
- An easy ability for Partners to be able to update their own listings
- Clearly defined and documented workflow
- Email integration with the ability to create distribution lists, and comply with the latest iCANN requirements
- Ability to search contacts and partners using a wide range of fields (city, company name, programs, partnership status)
- Full access to system via mobile devices

- Support browsers: Current and previous versions of Chrome and Internet Explorer
- Ongoing support and retainer for monthly maintenance services

Outputs

- Custom reporting utilizing any combination of fields
- Ability to export various reports to Microsoft Excel or Word documents
- Generate contact lists defined by any combination of fields
- Calendar reports showing activity by any combination of fields

Interface

- Mt. Hood Territory website (www.mthoodterritory.com)
- Email list management system (Constant Contact or equivalent)
- Email and Tasks (Microsoft Outlook 2013) – Note: this is not a requirement and may not work due to Clackamas County security and firewall restrictions
- Maintain current security standards

Other Desired Capabilities

- Bulk upload of external information (such as batch loads of partner data)

Expectations and Deliverables

- Establish a timeline and scope of project for the migration of data and programming of the backend structures to connect to the website within the first two (2) weeks of contract implementation.
- Provide an implementation plan
- Implement project based on established timeline, scope, implementation plan.
- Within the first two (2) weeks provide to the marketing manager and webmaster documentation on the business process for site improvements and the process of how they will be handled, with pricing per hour or “module” for undetermined future site improvements
- Provide for webmaster training on how to use the tools of the website within two (2) weeks after implementation. Staff training would be appreciated but not required.
- Provide an annual written report to the webmaster on server status, system, and security improvements.

3. Sample Contract

Submission of a Quote in response to this RFQ indicates Quoter’s willingness to enter into a contract containing substantially the same terms of the below referenced contract, which can be found at: <http://www.clackamas.us/bids/terms.html>, with the below indicated requirements. No action or response to the sample contract is required under this RFQ. The applicable sample contract is the:

Professional Services Contract (unless checked, item does not apply)

The following paragraphs of the Professional Services Contract will be applicable:

- Article I, Paragraph 4 – Travel and Other Expense is Authorized
- Article II, Paragraph 29 – Confidentiality
- Article II, Paragraph 29 – Criminal Background Check Requirements
- Article II, Paragraph 30 – Key Persons
- Exhibit A – On-Call Provision

The following insurance requirements will be applicable:

- Professional Liability: combined single limit, or the equivalent, of not less than \$1,000,000 per occurrence, with an annual aggregate limit of \$2,000,000 for damages caused by error, omission or negligent acts.
- Commercial General Liability: combined single limit, or the equivalent, of not less than \$1,000,000 per occurrence, with an annual aggregate limit of \$2,000,000 for Bodily Injury and Property Damage.

- Automobile Liability: combined single limit, or the equivalent, of not less than \$500,000 per occurrence for Bodily Injury and Property Damage.

4. Quote

Quotes should be short and concise with the following information:

- A. Company experience to include:
 - a. Current position in the market place
 - b. Points of differentiation form other providers
 - c. Team experience;
- B. Description of your approach to customizing your solution to fit the needs of unusual organizations, include case studies if possible;
- C. Project plan outlining key milestones and timing;
- D. Illustration of how we will interact for planning, development, execution, and optimization;
- E. Pricing, to include:
 - a. Staff hourly rates
 - b. Monthly retainer fee for CRM/CMS/Web management services with a precise definition of expenses covered by the retainer
 - c. Cost for discovery, configuration, data port, hosting, licensing, ongoing maintenance, and support fees
 - d. Outline any pricing structure based on modular website development and pricing per module for future development; and
- F. Any additional information that Clackamas County should take into consideration for the project or qualifications.

Additional Questions and Information:

- Provide at least two (2) case studies demonstrating relevant experience to the tourism industry.
- Provide a client list for review and contacting as necessary.
- How do you meet custom requirements?
- What is your process for making user experience (“UX”) improvements?
- What is you maintenance schedule?
- What is your typical support response times?
- What are your hourly rates for development beyond what is outlined in the Scope of Work?
- What is your hosting environment and what systems do you have in place to assure security of the data, including at rest?

5. Evaluation

Quotes will be evaluated based on subjective factors including, but not limited to: Company experience, project approach, project plan, illustration, and pricing including a not-to-exceed price.

6. Product/System Presentation.

An online product system presentation will consist of an agency preview of the CRM/CMS/Website management system for staff to fully understand your functionality and interface. Presentation will provide a brief overview of key tool elements and shall not last more than 30 minutes. Company will be selected following review of quotes and presentation.

CLACKAMAS COUNTY CERTIFICATIONS
RFQ #2017-86

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 extend 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) 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 sample contract referenced in this RFQ, 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 sample contract referenced in this RFQ (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.