EXECUTIVE SUMMARY

Recommendation to award RFP 16-6563 for Tourism Research Services to Research Data Services, Inc., recommend approval of the County Attorney approved contract, and make a finding that this item promotes tourism.

OBJECTIVE: To award RFP 16-6563 for Tourism Research Services to the successful bidder, Research Data Services, Inc.

<u>CONSIDERATIONS:</u> RFP 16-6563 for Tourism Research Services was publicly advertised on January 12, 2016. Email notices were sent to 389 firms with 19 firms requesting full solicitation packages. Two responses were received by the due date of February 2, 2016. No responses were found to be non responsive.

A selection committee met on Monday, February 29, 2016 to review the proposals. By consensus of the members, the following firm is recommended to the Board along with the attached contract:

Research Data Services, Inc., Tampa, FL

Vendor will provide destination research services including but not limited to a monthly visitor profile, a monthly visitor impact study, monthly hotel occupancy and average daily rate study, an annual impact of tourism study, an information inquiry conversion study and focus group research.

FISCAL IMPACT: Funds in the amount of \$120,800 for Tasks # 1-5 plus \$6,000 in out of pocket expenses for a total annual cost of \$126,800 is available in the tourism Division Board approved FY 16 budget in fund 184, Contractual Services.

GROWTH MANAGEMENT IMPACT: There is no impact to the Growth Management Plan from this action.

<u>LEGAL CONSIDERATIONS</u>: This item has been approved as to form and legality and requires majority vote for approval. – CMG

RECOMMENDATION: To award RFP 16-6563 for Tourism Research Services to Research Data Services, Inc., recommend approval of the County Attorney approved contract, and make a finding that this item promotes tourism.

PREPARED BY: Jack Wert, Tourism Director

Attachments: Bid Document; Research Data Services, Inc Bid Response; Bid Tab Sheet, Agreement.

REQUEST FOR PROPOSAL



COLLIER COUNTY BOARD OF COUNTY COMMISSIONERS

Solicitation 16-6563 TDC Research Services

Adam Northrup, Procurement Strategist

239-252-6098 (Telephone) 239-252-6302 (Fax)

adamnorthrup@colliergov.net (Email)

This proposal solicitation document is prepared in a Microsoft Word format. Any alterations to this document made by the Vendor may be grounds for rejection of proposal, cancellation of any subsequent award, or any other legal remedies available to the Collier County Government.



Table of Contents

LEGAL NOTICE	3
EXHIBIT I: SCOPE OF WORK, SPECIFICATIONS AND RESPONSE FORMAT	
EXHIBIT II: GENERAL RFP INSTRUCTIONS	11
EXHIBIT III: COLLIER COUNTY PURCHASE ORDER TERMS AND CONDITIONS	15
EXHIBIT IV: ADDITIONAL TERMS AND CONDITIONS FOR RFP	19
ATTACHMENT 1: VENDOR'S NON-RESPONSE STATEMENT	28
ATTACHMENT 2: VENDOR CHECK LIST	29
ATTACHMENT 3: CONFLICT OF INTEREST AFFIDAVIT	30
ATTACHMENT 4: VENDOR DECLARATION STATEMENT	31
ATTACHMENT 5: AFFIDAVIT FOR CLAIMING STATUS AS A LOCAL BUSINESS	33
ATTACHMENT 6: IMMIGRATION AFFIDAVIT CERTIFICATION	
ATTACHMENT 7: VENDOR SUBSTITUTE W – 9	35
ATTACHMENT 8: INSURANCE AND BONDING REQUIREMENTS	36
ATTACHMENT 9: REFERENCE QUESTIONNAIRE	38



Legal Notice

Sealed Proposals to provide Tourism Research Services will be received until **3:00PM Naples local time, on 2/02/2016** at the Collier County Government, Purchasing Department, 3327 Tamiami Trail E, Naples, FL 34112.

Solicitation

16-6563 - TDC Research Services

Services to be provided may include, but not be limited to the following: The County endeavors to find a research firm that can perform primary and secondary research to determine various aspects and results of the tourism efforts in the County.

All statements shall be made upon the official proposal form which may be obtained on the Collier County Purchasing Department Online Bidding System website: www.colliergov.net/bid.

Collier County does not discriminate based on age, race, color, sex, religion, national origin, disability or marital status.

BOARD OF COUNTY COMMISSIONERS COLLIER COUNTY, FLORIDA,

BY: /S/ Joanne Markiewicz
Director, Procurement Services

This Public Notice was posted on the Collier County Purchasing Department website: www.colliergov.net/purchasing and in the Lobby of Purchasing Building "G", Collier County Government Center on 1/12/2016.



Exhibit I: Scope of Work, Specifications and Response Format

As requested by the Naples, Marco Island, Everglades Convention and Visitors Bureau (CVB) (hereinafter, the "Division or Department"), the Collier County Board of County Commissioners Procurement Services Division (hereinafter, "County") has issued this Request for Proposal (hereinafter, "RFP") with the intent of obtaining proposals from interested and qualified Consultants in accordance with the terms, conditions and specifications stated or attached. The Consultant, at a minimum, must achieve the requirements of the Specifications or Scope of Work stated.

The results of this solicitation may be used by other County departments once awarded according to the Board of County Commissioners Purchasing Policy.

Background

The Naples, Marco Island, Everglades Convention & Visitors Bureau (CVB) is a part of Collier County Government and serves as the marketing arm of the Collier County Tourist Development Council (TDC). The Collier County Tourism Division administers the work of both the TDC and the CVB.

Brief Description of Purchase

The Tourism Department wishes to engage a research firm that can perform primary and secondary research to determine various aspects and results of the tourism efforts in the County. Historically, County departments have spent approximately \$125,000 annually for these services.

Detailed Scope of Work

The Contractor, at a minimum, must achieve all the requirements of the Specifications or Scope of Work stated herein.

Primary and secondary tourism research shall include.

1. VISITOR PROFILE STUDY

- Monthly face to face interviews in hotels and attractions
- Interviews at Southwest Florida International Airport (RSW) when possible
- Interviews at sports and special events as assigned by Project Manager
- Monthly interviews conducted on-line with past visitors or inquirers
- Monthly reports to CVB office profiling:
 - Visitor demographics
 - o Economic, psychographic and budgetary factors
 - Separate breakouts for business, meeting and leisure travelers
 - Separate detailed origin and demographic reports on international and domestic visitors
 - Tourism Industry employment statistics for Collier County
 - o Seasonal reports for high, low and shoulder seasons
 - Monthly third-party reports for economic trends, competitive destination information and group meeting impact
 - Sampling of visitor comments from face to face and on-line interviews
 - Annual reports of visitor impacts in all of the above categories

2. HOTEL OCCUPANCY & AVERAGE DAILY RATE STUDY

- Monthly survey of hotels to determine Occupancy, ADR, Rev Par, Room Demand, Number of Visitors, Visitor Spending, Visitor Economic Impact, Hotel Room Nights.
- Monthly report to County on results with comparisons to previous months and previous years.
- Annual report with comparisons to previous year
- Seasonal reports for High, low and shoulder times of year

3. IMPACT OF TOURISM STUDY

Annual Report on economic impact of tourism on Collier County to include:

- Measurement of sales, gas and tourist development tax revenue and impact
- Tax savings to Collier County residents resulting from visitor spending
- Employment impact of tourism (i.e. jobs supported, jobs created, wages earned)
- Impact on schools, revenue generated to them
- Visitor spending at hotels, restaurants, shopping, attractions, gasoline
- · Return on Investment of advertising dollars to visitor spending

4. INQUIRY CONVERSION STUDY

- Annual report of random sampling of inquiries for information from toll free numbers, e-mail and web site, and direct inquiries to destination advertising.
- Percent of conversions with comparisons to other similar sized destinations
- Return on investment for various publications and broadcast used in marketing the destination.
- Economic impact from those respondents who came to the destination as a result of our marketing efforts

5. FOCUS GROUP RESEARCH

Qualitative research on an as needed basis to measure or test the following: These sessions should be placed in domestic and International feeder markets:

- Testing of Advertising concepts
- Testing of brand positioning and perceptions
- Testing of consumer preferences, activities and perceptions of Collier County as a visitor destination
- Testing of preferences and buying habits with group meeting planners
- Testing of website effectiveness, ease and methods of use.
- Executive summary and detailed tabulation of the results of each study

Term of Contract

The contract term, if an award(s) is/are made is intended to be for one (1) year with four (4) one year renewal options.

Prices shall remain firm for the initial term of this contract. Requests for consideration of a price adjustment must be made prior to the contract anniversary date, in writing, to the Procurement Director. Price adjustments are dependent upon the consumer price index (CPI) over the past twelve (12) months, budget availability and program manager approval.

Surcharges will not be accepted in conjunction with this contract, and such charges should be incorporated into the pricing structure.

Projected Solicitation Timetable

The following projected timetable should be used as a working guide for planning purposes only. The County reserves the right to adjust this timetable as required during the course of the RFP process.

Event	Date
Issue Solicitation Notice	1/12/2016
Last Date for Receipt of Written Questions	1/28/2016; 3:00PM
Solicitation Deadline Date and Time	2/2/2016; 3:00PM
Anticipated Evaluation of Submittals	February 2016
Anticipated Completion of Contract Negotiations	February 2016
Anticipated Board of County Commissioner's Contract	March 2016
Approval Date	

Response Format

The Vendor understands and agrees to abide by all of the RFP specifications, provisions, terms and conditions of same, and all ordinances and policies of Collier County. The Vendor further agrees that if it is awarded a contract, the work will be performed in accordance with the provisions, terms and conditions of the contract.

To facilitate the fair evaluation and comparison of proposals, all proposals must conform to the guidelines set forth in this RFP.

Any portions of the proposal that do not comply with these guidelines must be so noted and explained in the Acceptance of Conditions section of the proposal. However, any proposal that contains such variances may be considered non-responsive.

Proposals should be prepared simply and economically, providing a straightforward concise description of the Vendor's approach and ability to meet the County's needs, as stated in this RFP. All proposals should be presented as described in this RFP in PDF or Microsoft Word format with Tabs clearly marked. If outlined in this RFP, the utilization of recycled paper for proposal submission is strongly encouraged.

The items listed below shall be submitted with each proposal and should be submitted in the order shown. Each section should be clearly labeled, with pages numbered and separated by tabs. Failure by a Vendor to include all listed items may result in the rejection of its proposal.

1. Tab I, Cover Letter / Management Summary

Provide a cover letter, signed by an authorized officer of the firm, indicating the underlying philosophy of the firm in providing the services stated herein. Include the name(s), telephone number(s) and email(s) of the authorized contact person(s) concerning proposal. Submission of a signed Proposal is Vendor's certification that the Vendor will accept any awards as a result of this RFP. List all proposed subcontractors who will participate on the team.

2. Tab II, Business Plan (25 points)

In this tab, include:

- Description of the proposed contract team and the role to be played by each member of the team.
- Timeline for delivery of each task throughout the contract year.
- Creativity ideas in the way that your firm will collect data, unique interviewing techniques and reporting delivery.
- Explain how you ensure that the data collected is accurate and useful to the County.
- 3. Tab III, Cost of Services to the County (15 points)
 - Provide the projected yearly total cost for each of the five (5) research tasks outlined in this solicitation. On a separate page, use the following format report your proposed costs to the County.

Task	Description	UOM	Quantity	Unit Price	Total Price
1	Visitor Profile Study	Monthly	12	\$	\$
2	Hotel Occupancy & Average Daily Rate	Monthly	12	\$	\$
	Study				
3	Impact of Tourism Study	Monthly	12	\$	\$
4	Inquiry Conversion Study	Monthly	12	\$	\$
5	Focus Group Research	Each	4	\$	\$
	Yearly Price				\$

Additionally, provide the projected monthly cost of out of pocket expenses such as travel for focus groups that would be in addition to the monthly service fee for the above services. "Out of pocket expenses" include, but are not limited to expenses such as: official telephone calls and FAX transmissions, parking fees, reasonable commercial transportation, reasonable gratuities, taxes, shipping fees, tolls, and travel expenses for visiting with media, meals and travel expenses for media coming to Collier County, entertainment, location rental and catering for events, etc.

Description	UOM	Rate
Out of Pocket Fees (maximum)	Monthly	\$

Additionally, provide an hourly fee for special projects not included in the five (5) research tasks listed in the scope of work, and please provide the projected monthly and annual cost of out of pocket expenses such as travel for focus groups that would be in addition to the monthly service fee for the above services.

Description	UOM	Rate
Hourly Rate for Special Projects	Hourly	\$

Prior to the Selection Committee reviewing proposals, the following methodology will be applied to each vendor's information provided in this area:

• The "yearly price", "out of pocket maximum" and "hourly rate for special projects" from above, will be added together to yield the Total cost of services to the County.

- The County shall create a ranking for this item from the lowest Total to highest Total by vendor. Items marked with an N/A (or similar notation will be given the score of zero (0)).
- The greatest number of points allowed in this criterion will be awarded to the vendor who has the lowest Total.
- The next lowest vendor's Total will be divided into the lowest vendor's Total which will then be
 multiplied by criteria points to determine the vendor's points awarded. Each subsequent vendor's
 point score will be calculated in the same manner.
- Points awarded will be extended to the first decimal point (per Microsoft Excel).

For illustrative purposes only, see chart for an example of how these points would be distributed among the five proposers.

Vendor Name	Total Cost of Services to the County (lower is more positive)	Total Points Awarded
Vendor ABC	4,200	15
Vendor DEF	5,350	11.9
Vendor GHI	6,200	10.2
Vendor JKL	10,000	6.3

The points awarded by vendor will be distributed to the Selection Committee prior to their evaluation of the proposals. The Selection Committee will review the vendor's proposal to ensure consistency and completion of all tasks in the RFP, and review the Points Awarded per vendor. The Selection Committee members may, at their sole discretion, modify the reference points assigned after a thorough review of the proposal and prior to final ranking by the final Selection Committee.

4. Tab IV, Experience and Capacity of Firm (20 points)

Demonstrate key parts of your firms experience that makes you uniquely qualified to perform these services for the County, including:

- Provide information that documents your firm's and subcontractors' qualifications to
 produce the required deliverables, including abilities, capacity, skill, and financial strength,
 and number of years of experience in providing the required services.
- Describe the various team members' successful experience in working with one another on previous projects. Please detail contributions that the team members have made these projects, and how their contributions were measured.

5. Tab V, Specialized Expertise of Team Members (20 points)

Identify the proposed account manager if you are awarded the Collier County Account. Include resume and detailed list of career accomplishments. Additionally, provide responses to the items listed below in the format identified.

 Number of years the project manager has in a leadership role in the market research. 	
 Number of governmental accounts managed by the proposed account manger over the two year period. (1/1/13-12/31/15). 	
 3. Number of proposer's fulltime equivalent staff (including the account manager) assigned to the County's scope of work in this RFP. Attach resumes of all staff assigned to our account. 	
 Number of other accounts to be managed concurrently by the account manger should this firm receive an award to this RFP. 	
TOTAL (add 1 + 2 + 3, then subtract 4)	

Prior to the Selection Committee reviewing proposals, the following methodology will be applied to each vendor's information provided in this area:

- The County shall create a ranking from highest Total to the lowest total. Information not provided by the vendor in this format shall receive a score of zero (0).
- The greatest number of points allowed in this criterion will be awarded to the vendor who has the highest Total price.
- The next highest Total will be divided into the highest Total which will then be multiplied by criteria points to determine the vendor's points awarded. Each subsequent vendor's Total score will be calculated in the same manner.
- Points awarded will be extended to the first decimal point (per Microsoft Excel).

For illustrative purposes only, see chart for an example of how these points would be distributed among the five proposers.

Vendor Name	Team	Points Awarded
Vendor ABC	24	20
Vendor DEF	18	15
Vendor GHI	18	15
Vendor JKL	10	8.4

6. Tab VI, References (10 points)

In order for the vendor to be awarded any points for this tab, the County requests that the vendor submits five (5) **completed** reference forms from clients whose projects are of a similar nature to this solicitation as a part of their proposal. The County will only use the methodology calculations for the first five (5) references (only) submitted by the vendor in their proposal.

Prior to the Selection Committee reviewing proposals, the following methodology will be applied to each vendor's information provided in this area:

• The County shall total each of the vendor's five reference questionnaires and create a ranking from highest number of points to lowest number of points. References marked with an N/A (or similar notation will be given the score of zero (0)). Vendors who do not turn in reference forms will be counted as zero (0).

- The greatest number of points allowed in this criterion will be awarded to the vendor who
 has the highest score.
- The next highest vendor's number of points will be divided by the highest vendor's points which will then be multiplied by criteria points to determine the vendor's points awarded. Each subsequent vendor's point score will be calculated in the same manner.
- Points awarded will be extended to the first decimal point (per Microsoft Excel).

For illustrative purposes only, see chart for an example of how these points would be distributed among the five proposers.

Vendor Name	Vendor Total Reference Score	Points Awarded
Vendor ABC	445	10
Vendor DEF	435	9.8
Vendor GHI	425	9.6
Vendor JKL	385	8.7
Vendor MNO	385	8.7
Vendor PQR	250	5.6

Note: Sample chart reflects a 10 point reference criterion.

The points awarded by vendor will be distributed to the Selection Committee prior to their evaluation of the proposals. The Selection Committee will review the vendor's proposal to ensure consistency and completion of all tasks in the RFP, and review the Points Awarded per vendor. The Selection Committee may, at their sole discretion, contact references, and/or modify the reference points assigned after a thorough review of the proposal and prior to final ranking by the final Selection Committee.

7. Tab VII, Acceptance of Conditions (0 points)

Indicate any exceptions to the general terms and conditions of the RFP, and to insurance requirements or any other requirements listed in this RFP. If no exceptions are indicated in this tabbed section, it will be understood that no exceptions to these documents will be considered after the award, or if applicable, during negotiations. Exceptions taken by a Vendor may result in evaluation point deduction(s) and/or exclusion of proposal for Selection Committee consideration, depending on the extent of the exception(s). Such determination shall be at the sole discretion of the County and Selection Committee.

8. Tab VIII, Required Form Submittals

- Attachment 2: Vendor Check List
- Attachment 3: Conflict of Interest Affidavit
- Attachment 4: Vendor Declaration Statement
- Attachment 5: Affidavit for Claiming Status as a Local Business
- Attachment 6: Immigration Affidavit Certification
- Attachment 7: Vendor Substitute W-9
- Attachment 8: Insurance and Bonding Requirements
- Attachment 9: Reference Questionnaire

Exhibit II: General RFP Instructions

1. Questions

Direct questions related to this RFP to the Collier County Purchasing Department Online Bidding System website: www.colliergov.net/bid. Vendors must clearly understand that the only official answer or position of the County will be the one stated on the Collier County Purchasing Department Online Bidding System website. For general questions, please call the referenced Procurement Strategist noted on the cover page.

2. Pre-Proposal Conference

The purpose of the pre-proposal conference is to allow an open forum for discussion and questioning with County staff regarding this RFP with all prospective Vendors having an equal opportunity to hear and participate. Oral questions will receive oral responses, neither of which will be official, nor become part of the RFP. Only written responses to written questions will be considered official, and will be included as part of this RFP as an addendum.

All prospective Vendors are strongly encouraged to attend, as, this will usually be the only pre-proposal conference for this solicitation. If this pre-proposal conference is denoted as "mandatory", prospective Vendors must be present in order to submit a proposal response.

3. Compliance with the RFP

Proposals must be in strict compliance with this RFP. Failure to comply with all provisions of the RFP may result in disqualification.

4. Ambiguity, Conflict, or Other Errors in the RFP

It is the sole responsibility of the Vendor if the Vendor discovers any ambiguity, conflict, discrepancy, omission or other error in the RFP, to immediately notify the Procurement Strategist, noted herein, of such error in writing and request modification or clarification of the document prior to submitting the proposal. The Procurement Strategist will make modifications by issuing a written revision and will give written notice to all parties who have received this RFP from the Purchasing Department.

5. Proposal, Presentation, and Protest Costs

The County will not be liable in any way for any costs incurred by any Vendor in the preparation of its proposal in response to this RFP, nor for the presentation of its proposal and/or participation in any discussions, negotiations, or, if applicable, any protest procedures.

6. **Delivery of Proposals**

All proposals are to be delivered before 3:00PM, Naples local time, on or before 2/02/2016 to:

Collier County Government Purchasing Department 3327 Tamiami Trail E Naples FL 34112 Attn: Adam Northrup Procurement Strategist

The County does not bear the responsibility for proposals delivered to the Purchasing Department past the stated date and/or time indicated, or to an incorrect address by Consultant's personnel or by the Consultant's outside carrier. However, the Procurement Director, or designee, reserves the right to accept proposals received after the posted close time under the following conditions:

- The tardy submission of the proposal is due to the following circumstances, which may
 include but not be limited to: late delivery by commercial carrier such as Fed Ex, UPS
 or courier where delivery was scheduled before the deadline.
- The acceptance of said proposal does not afford any competing firm an unfair advantage in the selection process.

Vendors must submit one (1) paper copy clearly labeled "Master," and six (6) disks (CD's/DVD's) with one copy of the proposal on each disk in Word, Excel or PDF. List the Solicitation Number and Title on the outside of the box or envelope.

7. Validity of Proposals

No proposal can be withdrawn after it is filed unless the Vendor makes their request in writing to the County prior to the time set for the closing of Proposals. All proposals shall be valid for a period of one hundred eighty (180) days from the submission date to accommodate evaluation and selection process.

8. Method of Source Selection

The County is using the Competitive Sealed Proposals methodology of source selection for this procurement, as authorized by Ordinance Number 2013-69 establishing and adopting the Collier County Purchasing Policy.

The County may, as it deems necessary, conduct discussions with qualified Vendors determined to be in contention for being selected for award for the purpose of clarification to assure full understanding of, and responsiveness to solicitation requirements.

9. Evaluation of Proposals

The County's procedure for selecting is as follows:

- 1. The County Manager or designee shall appoint a selection committee to review all proposals submitted.
- **2.** The Request for Proposal is issued.
- 3. Subsequent to the receipt closing date for the proposals, the Procurement professional will review the proposals received and verify each proposal to determine if it minimally responds to the requirements of the published RFP.
- **4.** Selection committee meetings will be open to the public and the Procurement professional will publicly post prior notice of such meeting(s) in the lobby of the Purchasing Building and on the County's Procurement Services Internet site.
- 5. Prior to the first meeting (Organization Meeting) of the selection committee, the Procurement professional will post a notice announcing the date, time and place of the meeting at least three (3) working days prior to the meeting. At the initial organization meeting, the selection committee members will receive instructions, the submitted

- proposals, and establish the next selection committee meeting date and time. After the first meeting, the Procurement professional will publically announce all subsequent committee meeting dates and times. The subsequent meeting dates and times will be posted with at least one (1) day advanced notice.
- 6. Selection committee members will independently review and score each proposal based on the evaluation criteria stated in the request for proposal using the Individual Selection Committee Score and Rank Form and prepare comments for discussion at the next meeting. The Individual Selection Committee Score and Rank Form is merely a tool to assist the selection committee member in their review of the proposals.
- 7. At the scheduled selection meeting, the members will present their independent findings / conclusions / comments based on their reading and interpretation of the materials presented to each other, and may ask questions of one another. At the conclusion of that discussion, members of the public will be offered an opportunity (not to exceed three (3) minutes) to provide comments.
- 8. At the conclusion of public comments (provided for in number 7), the selection committee members will individually rank order each proposer. Collier County selection committee members may consider all the material submitted by the Proposer and other information Collier County may obtain to determine whether the Proposer is capable of and has a history of successfully completing projects of this type, including, without limitation, additional information Collier County may request, clarification of proposer information, public comments, and/or additional credit information.
- 9. Once the individual ranking has been completed, the Procurement professional will direct selection committee members to read their individual ranking publically. The Procurement professional will record individual rankings on the Final Ranking Sheet which will mathematically compile into an overall selection committee rank of proposers.
- 10. In any of the selection committee meeting deliberations, by consensus, members may request to invite proposers in to clarify their proposals, ask for additional information, present materials, interview, ask questions, etc. The members may consider any and all information obtained through this method in formulating their individual ranking and subsequent selection committee overall ranking and final ranking.
- 11. The selection committee's overall rank of firms in order of preference (from highest beginning with a rank of one (1) to the lowest) will be discussed and reviewed by the Procurement Strategist. By final consensus, and having used all information presented (proposal, presentation, references, etc.), the selection committee members will create a final ranking and staff will subsequently enter into negotiations. Award of the contract is dependent upon the successful and full execution of a mutually agreed contract, pending the final approval by the Board of County Commissioners.

The County reserves the right to withdraw this RFP at any time and for any reason, and to issue such clarifications, modifications, and/or amendments as it may deem appropriate.

Receipt of a proposal by the County or a submission of a proposal to the County offers no rights upon the Vendor nor obligates the County in any manner.

Acceptance of the proposal does not guarantee issuance of any other governmental approvals. Proposals which include provisions requiring the granting of zoning variances shall not be considered.

10. References

The County reserves the right to contact any and all references pertaining to this solicitation and related proposal.

11. Proposal Selection Committee and Evaluation Factors

The County Manager shall appoint a Selection Committee to review all proposals submitted. The factors to be considered in the evaluation of proposal responses are listed below.

Tab II, Business Plan	25
Tab III, Cost of Services to the County	15
Tab IV, Experience and Capacity of Firm	20
Tab V, Specialized Expertise of Team Members	20
Tab VI, References	10
Local Vendor Preference	10
TOTAL	100

Tie Breaker: In the event of a tie, **both in individual scoring and in final ranking,** the firm with the lowest paid dollars by Collier County to the vendor (as obtained from the County's financial system) within the last five (5) years will receive the higher individual ranking. If there is a multiple firm tie in either individual scoring or final ranking, the firm with the lowest volume of work shall receive the higher ranking, the firm with the next lowest volume of work shall receive the next highest ranking and so on.

12. Acceptance or Rejection of Proposals

The right is reserved by the County to waive any irregularities in any proposal, to reject any or all proposals, to re-solicit for proposals, if desired, and upon recommendation and justification by Collier County to accept the proposal which in the judgment of the County is deemed the most advantageous for the public and the County of Collier.

Any proposal which is incomplete, conditional, obscure or which contains irregularities of any kind, may be cause for rejection. In the event of default of the successful Vendor, or their refusal to enter into the Collier County contract, the County reserves the right to accept the proposal of any other Vendor or to re-advertise using the same or revised documentation, at its sole discretion.

Exhibit III: Collier County Purchase Order Terms and Conditions

1. Offer

This offer is subject to cancellation by the COUNTY without notice if not accepted by VENDOR within fourteen (14) days of issuance.

2. Acceptance and Confirmation

This Purchase Order (including all documents attached to or referenced therein) constitutes the entire agreement between the parties, unless otherwise specifically noted by the COUNTY on the face of this Purchase Order. Each delivery of goods and/or services received by the COUNTY from VENDOR shall be deemed to be upon the terms and conditions contained in this Purchase Order.

No additional terms may be added and Purchase Order may not be changed except by written instrument executed by the COUNTY. VENDOR is deemed to be on notice that the COUNTY objects to any additional or different terms and conditions contained in any acknowledgment, invoice or other communication from VENDOR, notwithstanding the COUNTY'S acceptance or payment for any delivery of goods and/or services, or any similar act by VENDOR.

3. Inspection

All goods and/or services delivered hereunder shall be received subject to the COUNTY'S inspection and approval and payment therefore shall not constitute acceptance. All payments are subject to adjustment for shortage or rejection. All defective or nonconforming goods will be returned pursuant to VENDOR'S instruction at VENDOR'S expense.

To the extent that a purchase order requires a series of performances by VENDOR, the COUNTY prospectively reserves the right to cancel the entire remainder of the Purchase Order if goods and/or services provided early in the term of the Purchase Order are non-conforming or otherwise rejected by the COUNTY.

4. Shipping and Invoices

 All goods are FOB destination and must be suitably packed and prepared to secure the lowest transportation rates

- and to comply with all carrier regulations. Risk of loss of any goods sold hereunder shall transfer to the COUNTY at the time and place of delivery; provided that risk of loss prior to actual receipt of the goods by the COUNTY nonetheless remains with VENDOR.
- b) No charges will be paid by the COUNTY for packing, crating or cartage unless otherwise specifically stated in this Purchase Order. Unless otherwise provided in Purchase Order, no invoices shall be issued nor payments made prior to delivery. Unless freight and other charges are itemized, any discount will be taken on the full amount of invoice.
- c) All shipments of goods scheduled on the same day via the same route must be consolidated. Each shipping container must be consecutively numbered and marked to show this Purchase Order number. The container and Purchase Order numbers must be indicated on bill of lading. Packing slips must show Purchase Order number and must be included on each package of less than container load (LCL) shipments and/or with each car load of equipment. The COUNTY reserves the right to refuse or return any shipment or equipment at VENDOR'S expense that is not marked Purchase Order numbers. with VENDOR agrees to declare to the carrier the value of any shipment made under this Purchase Order and the full invoice value of such shipment.
- d) All invoices must contain the Purchase Order number and any other specific information as identified on the Purchase Order. Discounts of prompt payment will be computed from the date of receipt of goods or from date of receipt of invoices, whichever is later. Payment will be made upon receipt of a proper invoice and in compliance with Chapter 218, Fla. Stats., otherwise known as the "Local Government Prompt Payment Act," and, pursuant to the Board of County Commissioners Purchasing Policy.

5. Time Is Of the Essence

Time for delivery of goods or performance of services under this Purchase Order is of the essence. Failure of VENDOR to meet delivery schedules or deliver within a reasonable time, as interpreted by the COUNTY in its sole judgment, shall entitle the COUNTY to seek all remedies available to it at law or in equity. VENDOR agrees to reimburse the COUNTY for any expenses incurred in enforcing its rights. VENDOR further agrees that undiscovered delivery of nonconforming goods and/or services is not a waiver of the COUNTY'S right to insist further compliance nogu all specifications.

6. Changes

The COUNTY may at any time and by written notice make changes to drawings and specifications, shipping instructions, quantities and delivery schedules within the general scope of this Purchase Order. Should any such change increase or decrease the cost of, or the time required for performance of the Purchase Order, an equitable adjustment in the price and/or delivery schedule will be negotiated by the COUNTY and VENDOR. Notwithstanding the foregoing, VENDOR has an affirmative obligation to give notice if the changes will decrease costs. Any claims for adjustment by VENDOR must be made within thirty (30) days from the date the change is ordered or within such additional period of time as may be agreed upon by the parties.

7. Warranties

VENDOR expressly warrants that the goods and/or services covered by this Purchase Order will conform to the specifications, drawings, samples or other descriptions furnished or specified by the COUNTY, and will be of satisfactory material and quality production, free from defects and sufficient for the purpose intended. Goods shall be delivered free from any security interest or other lien, encumbrance or claim of any third party. These warranties shall survive inspection, acceptance, passage of title and payment by the COUNTY.

8. Statutory Conformity

Goods and services provided pursuant to this Purchase Order, and their production and transportation shall conform to all applicable laws, including but not limited to the Occupational Health and Safety Act, the Federal Transportation Act and the Fair Labor Standards Act, as well as any law or regulation noted on the face of the Purchase Order.

9. Advertising

No VENDOR providing goods and services to the COUNTY shall advertise the fact that it has contracted with the COUNTY for goods and/or services, or appropriate or make use of the COUNTY'S name or other identifying marks or property without the prior written consent of the COUNTY'S Purchasing Department.

10. Indemnification

VENDOR shall indemnify and hold harmless the COUNTY from any and all claims, including claims of negligence, costs and expenses, including but not limited to attorneys' fees, arising from, caused by or related to the injury or death of any person (including but not limited to employees and agents of VENDOR in the performance of their duties or otherwise), or damage to property (including property of the COUNTY or other persons), which arise out of or are incident to the goods and/or services to be provided hereunder.

11. Warranty of Non-Infringement

VENDOR represents and warrants that all goods sold or services performed under this Purchase Order are: a) in compliance with applicable laws; b) do not infringe any patent, trademark, copyright or trade secret; and c) do not constitute unfair competition.

VENDOR shall indemnify and hold harmless the COUNTY from and against any and all claims, including claims of negligence, costs and expense, including but not limited to attorneys' fees, which arise from any claim, suit or proceeding alleging that the COUNTY'S use of the goods and/or services provided under this Purchase Order are inconsistent with VENDOR'S representations and warranties in section 11 (a).

If any claim which arises from VENDOR'S breach of section 11 (a) has occurred, or is likely to occur, VENDOR may, at the COUNTY'S option, procure for the COUNTY the right to continue using the goods or services, or replace or modify the goods or services so that they become non-infringing, (without any material degradation in performance, quality, functionality or additional cost to the COUNTY).

12. Insurance Requirements

The VENDOR, at its sole expense, shall provide commercial insurance of such type and with such terms and limits as may be reasonably associated with the Purchase Order. Providing and maintaining adequate insurance coverage is a material obligation of the VENDOR. All insurance policies shall be executed through insurers authorized or eligible to write policies in the State of Florida.

13. Compliance with Laws

In fulfilling the terms of this Purchase Order, VENDOR agrees that it will comply with all federal, state, and local laws, rules, codes, and ordinances that are applicable to the conduct of its business. By way of nonexhaustive example, this shall include the American with Disabilities Act and all prohibitions against discrimination on the basis of race, religion, sex creed, national origin, handicap, marital status, or veterans' Further, VENDOR acknowledges status. and without exception or stipulation shall be fully responsible for complying with the provisions of the Immigration Reform and Control Act of 1986 as located at 8 U.S.C. 1324, et seq. and regulations relating thereto, as either may be amended. Failure by the awarded firm(s) to comply with the laws referenced herein shall constitute a breach of the award agreement and the County shall have the discretion to unilaterally terminate said agreement immediately. Any breach of this provision may be regarded by the COUNTY as a material and substantial breach of the contract arising from this Purchase Order.

14. Force Majeure

Neither the COUNTY nor VENDOR shall be responsible for any delay or failure in performance resulting from any cause beyond their control, including, but without limitation to war, strikes, civil disturbances and acts of nature. When VENDOR has knowledge of any actual or potential force majeure or other conditions which will delay or threatens to delay timely performance of this Purchase Order, VENDOR shall immediately give notice thereof, including all relevant information with respects to what steps VENDOR is taking to complete delivery of the goods and/or services to the COUNTY.

15. Assignment

VENDOR may not assign this Purchase Order, nor any money due or to become due without the prior written consent of the COUNTY. Any assignment made without such consent shall be deemed void.

16. **Taxes**

Goods and services procured subject to this Purchase Order are exempt from Florida sales and use tax on real property, transient rental property rented, tangible personal purchased or rented, or services purchased (Florida Statutes, Chapter 212), and from federal excise tax.

17. Annual Appropriations

The COUNTY'S performance and obligation to pay under this Purchase Order shall be contingent upon an annual appropriation of funds.

18. Termination

This Purchase Order may be terminated at any time by the COUNTY upon 30 days prior written notice to the VENDOR. This Purchase Order may be terminated immediately by the COUNTY for breach by VENDOR of the terms and conditions of this Purchase Order, provided that COUNTY has provided VENDOR with notice of such breach and VENDOR has failed to cure within 10 days of receipt of such notice.

19. General

a) This Purchase Order shall be governed by the laws of the State of Florida. The venue for any action brought to specifically enforce any of the terms and conditions of this Purchase Order shall be the Twentieth Judicial Circuit in and for Collier County, Florida

- b) Failure of the COUNTY to act immediately in response to a breach of this Purchase Order by VENDOR shall not constitute a waiver of breach. Waiver of the COUNTY by any default by VENDOR hereunder shall not be deemed a waiver of any subsequent default by VENDOR.
- c) All notices under this Purchase Order shall be sent to the respective addresses on the face page by certified mail, return receipt requested, by overnight courier service, or by personal delivery and will be deemed effective upon receipt. Postage, delivery and other charges shall be paid by the sender. A party may change its address for notice by written notice complying with the requirements of this section.
- d) The Vendor agrees to reimbursement of any travel expenses that may be

- associated with this Purchase Order in accordance with Florida Statute Chapter 112.061, Per Diem and Travel Expenses for Public Officers, employees and authorized persons.
- e) In the event of any conflict between or among the terms of any Contract Documents related to this Purchase Order, the terms of the Contract Documents shall take precedence over the terms of the Purchase Order. To the extent any terms and /or conditions of this Purchase Order duplicate or overlap the Terms and Conditions of the Contract Documents, the provisions of the Terms and/or Conditions that are most favorable to the County and/or provide the greatest protection to the County shall govern.

Exhibit IV: Additional Terms and Conditions for RFP

1. Insurance Requirements

The Vendor shall at its own expense, carry and maintain insurance coverage from responsible companies duly authorized to do business in the State of Florida as set forth in the Insurance and Bonding attachment of this solicitation. The Vendor shall procure and maintain property insurance upon the entire project, if required, to the full insurable value of the scope of work.

The County and the Vendor waive against each other and the County's separate Vendors, Contractors, Design Consultant, Subcontractors agents and employees of each and all of them, all damages covered by property insurance provided herein, except such rights as they may have to the proceeds of such insurance. The Vendor and County shall, where appropriate, require similar waivers of subrogation from the County's separate Vendors, Design Consultants and Subcontractors and shall require each of them to include similar waivers in their contracts.

Collier County shall be responsible for purchasing and maintaining, its own liability insurance.

Certificates issued as a result of the award of this solicitation must identify "For any and all work performed on behalf of Collier County."

The General Liability Policy provided by Vendor to meet the requirements of this solicitation shall name Collier County, Florida, as an additional insured as to the operations of Vendor under this solicitation and shall contain a severability of interests provisions.

Collier County Board of County Commissioners shall be named as the Certificate Holder. The Certificates of Insurance must state the Contract Number, or Project Number, or specific Project description, or must read: For any and all work performed on behalf of Collier County. The "Certificate Holder" should read as follows:

Collier County
Board of County Commissioners
Naples, Florida

The amounts and types of insurance coverage shall conform to the minimum requirements set forth in the Insurance and Bonding attachment, with the use of Insurance Services Office (ISO) forms and endorsements or their equivalents. If Vendor has any self-insured retentions or deductibles under any of the below listed minimum required coverage, Vendor must identify on the Certificate of Insurance the nature and amount of such self- insured retentions or deductibles and provide satisfactory evidence of financial responsibility for such obligations. All self-insured retentions or deductibles will be Vendor's sole responsibility.

Coverage(s) shall be maintained without interruption from the date of commencement of the Work until the date of completion and acceptance of the scope of work by the County or as specified in this solicitation, whichever is longer.

The Vendor and/or its insurance carrier shall provide 30 days written notice to the County of policy cancellation or non-renewal on the part of the insurance carrier or the Vendor. The Vendor shall also notify the County, in a like manner, within twenty-four (24) hours after receipt, of any notices of expiration, cancellation, non-renewal or material change in coverage or limits received by Vendor from its insurer and nothing contained herein shall relieve Vendor of this requirement to provide notice. In the event of a reduction in the aggregate limit of any policy to be provided by Vendor

hereunder, Vendor shall immediately take steps to have the aggregate limit reinstated to the full 156 extent permitted under such policy.

Should at any time the Vendor not maintain the insurance coverage(s) required herein, the County may terminate the Agreement or at its sole discretion shall be authorized to purchase such coverage(s) and charge the Vendor for such coverage(s) purchased. If Vendor fails to reimburse the County for such costs within thirty (30) days after demand, the County has the right to offset these costs from any amount due Vendor under this Agreement or any other agreement between the County and Vendor. The County shall be under no obligation to purchase such insurance, nor shall it be responsible for the coverage(s) purchased or the insurance company or companies used. The decision of the County to purchase such insurance coverage(s) shall in no way be construed to be a waiver of any of its rights under the Contract Documents.

If the initial or any subsequently issued Certificate of Insurance expires prior to the completion of the scope of work, the Vendor shall furnish to the County renewal or replacement Certificate(s) of Insurance not later than ten (10) calendar days after the expiration date on the certificate. Failure of the Vendor to provide the County with such renewal certificate(s) shall be considered justification for the County to terminate any and all contracts.

2. Offer Extended to Other Governmental Entities

Collier County encourages and agrees to the successful vendor extending the pricing, terms and conditions of this solicitation or resultant contract to other governmental entities at the discretion of the successful vendor.

3. Additional Items and/or Services

Additional items and / or services may be added to the resultant contract, or purchase order, in compliance with the Purchasing Policy.

4. County's Right to Inspect

The County or its authorized Agent shall have the right to inspect the Vendor's facilities/project site during and after each work assignment the Vendor is performing.

5. Vendor Performance Evaluation

The County has implemented a Vendor Performance Evaluation System for all contracts awarded in excess of \$25,000. To this end, vendors will be evaluated on their performance upon completion/termination of this Agreement.

6. Additional Terms and Conditions of Contract

Collier County has developed standard contracts/agreements, approved by the Board of County Commissioners (BCC). The selected Vendor shall be required to sign a standard Collier County contract within twenty one (21) days of Notice of Selection for Award.

The resultant contract(s) may include purchase or work orders issued under one, or any combination of price methodologies by the County's project manager:

Unit Price: the County agrees to pay a firm total fixed price (inclusive of all costs, including labor, materials, equipment, overhead, etc.) for a repetitive product or service delivered (i.e. installation

price per ton, delivery price per package or carton, etc.). The invoice must identify the unit price and the number of units received (no contractor inventory or cost verification required).

Time and Materials: the County agrees to pay the contractor for the amount of labor time spent by the contractor's employees and subcontractors to perform the work (number of hours times hourly rate), and for materials and equipment used in the project (cost of materials plus the contractor's mark up). This methodology is generally used in projects in which it is not possible to accurately estimate the size of the project, or when it is expected that the project requirements would most likely change. As a general business practice, these contracts include back-up documentation of costs; invoices would include number of hours worked and billing rate by position (and not company (or subcontractor) timekeeping or payroll records), material or equipment invoices, and other reimbursable documentation for the project. Generally speaking, the County assumes the project risk, the administration is more time consuming, and the County pays for the labor efforts and materials used to complete the project, including changes due to unforeseen conditions.

The County reserves the right to include in any contract document such terms and conditions, as it deems necessary for the proper protection of the rights of Collier County. A sample copy of this contract is available upon request. The County will not be obligated to sign any contracts, maintenance and/or service agreements or other documents provided by the Vendor.

The County's project manager shall coordinate with the Vendor / Contractor the return of any surplus assets, including materials, supplies, and equipment associated with the scope or work.

7. Payment Method

Payments are made in accordance with the Local Government Prompt Payment Act, Chapter 218, Florida Statutes. Vendor's invoices must include:

- Purchase Order Number
- Description and quantities of the goods or services provided per instructions on the County's purchase order or contract.

Invoices shall be sent to:

Board of County Commissioners Clerk's Finance Department ATTN: Accounts Payable 3299 Tamiami Trail E Ste 700 Naples FL 34112

Or emailed to: bccapclerk@collierclerk.com.

Collier County, in its sole discretion, will determine the method of payment for goods and/or services as part of this agreement.

Payment methods include:

- Traditional payment by check, wire transfer or other cash equivalent.
- Standard payment by purchasing card. Collier County's Purchasing Card Program is supported by standard bank credit suppliers (i.e. VISA and MasterCard), and as such, is cognizant of the Rules for VISA Merchants and MasterCard Merchant Rules.

The County may not accept any additional surcharges (credit card transaction fees) as ²³ of ¹⁵⁶ of using the County's credit card for transactions relating to this solicitation. The County will entertain bids clearly stating pricing for standard payment methods. An additional separate discounted price for traditional payments may be provided at the initial bid submittal if it is clearly marked as an "Additional Cash Discount."

Upon execution of the Contract and completion of each month's work, payment requests may be submitted to the Project Manager on a monthly basis by the Contractor for services rendered for that prior month. Services beyond sixty (60) days from current monthly invoice will not be considered for payment without prior approval from the Project manager. All invoices should be submitted within the fiscal year the work was performed. (County's fiscal year is October 1 - September 30.) Invoices submitted after the close of the fiscal year will not be accepted (or processed for payment) unless specifically authorized by the Project Manager.

Payments will be made for articles and/or services furnished, delivered, and accepted, upon receipt and approval of invoices submitted on the date of services or within six (6) months after completion of contract. Any untimely submission of invoices beyond the specified deadline period is subject to non-payment under the legal doctrine of "laches" as untimely submitted. Time shall be deemed of the essence with respect to the timely submission of invoices under this agreement.

In instances where the successful contractor may owe debts (including, but not limited to taxes or other fees) to Collier County and the contractor has not satisfied nor made arrangement to satisfy these debts, the County reserves the right to off-set the amount owed to the County by applying the amount owed to the vendor or contractor for services performed of for materials delivered in association with a contract.

Invoices shall not reflect sales tax. After review and approval, the invoice will be transmitted to the Finance Division for payment. Payment will be made upon receipt of proper invoice and in compliance with Chapter 218 Florida Statutes, otherwise known as the "Local Government Prompt Payment Act." Collier County reserves the right to withhold and/or reduce an appropriate amount of any payment for work not performed or for unsatisfactory performance of Contractual requirements.

8. Environmental Health and Safety

All Vendors and Sub vendors performing service for Collier County are required and shall comply with all Occupational Safety and Health Administration (OSHA), State and County Safety and Occupational Health Standards and any other applicable rules and regulations. Vendors and Sub vendors shall be responsible for the safety of their employees and any unsafe acts or conditions that may cause injury or damage to any persons or property within and around the work site. All firewall penetrations must be protected in order to meet Fire Codes.

Collier County Government has authorized OSHA representatives to enter any Collier County facility, property and/or right-of-way for the purpose of inspection of any Vendor's work operations. This provision is non-negotiable by any department and/or Vendor.

All new electrical installations shall incorporate NFPA 70E Short Circuit Protective Device Coordination and Arc Flash Studies where relevant as determined by the engineer.

All electrical installations shall be labeled with appropriate NFPA 70E arch flash boundary and PPE Protective labels.

9. Licenses

The Vendor is required to possess the correct Business Tax Receipt, professional license, and any other authorizations necessary to carry out and perform the work required by the project pursuant to all applicable Federal, State and Local Law, Statute, Ordinances, and rules and regulations of any kind. Additionally, copies of the required licenses must be submitted with the proposal response indicating that the entity proposing, as well as the team assigned to the County account, is properly licensed to perform the activities or work included in the contract documents. Failure on the part of any Vendor to submit the required documentation may be grounds to deem Vendor non-responsive. A Vendor, with an office within Collier County is also required to have an occupational license.

All State Certified contractors who may need to pull Collier County permits or call in inspections must complete a Collier County Contractor License registration form and submit the required fee. After registering the license/registration will need to be renewed thereafter to remain "active" in Collier County.

If you have questions regarding professional licenses contact the Contractor Licensing, Community Development and Environmental Services at (239) 252-2431, 252-2432 or 252-2909. Questions regarding required occupational licenses, please contact the Tax Collector's Office at (239) 252-2477.

10. Principals/Collusion

By submission of this Proposal the undersigned, as Vendor, does declare that 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; that this Proposal is made without connection with any person, company or parties making a Proposal, and that it is in all respects fair and in good faith without collusion or fraud.

11. Relation of County

It is the intent of the parties hereto that the Vendor shall be legally considered an independent Vendor, and that neither the Vendor nor their employees shall, under any circumstances, be considered employees or agents of the County, and that the County shall be at no time legally responsible for any negligence on the part of said Vendor, their employees or agents, resulting in either bodily or personal injury or property damage to any individual, firm, or corporation.

12. Termination

Should the Vendor be found to have failed to perform his services in a manner satisfactory to the County, the County may terminate this Agreement immediately for cause; further the County may terminate this Agreement for convenience with a thirty (30) day written notice. The County shall be sole judge of non-performance.

13. Lobbying

All firms are hereby placed on **NOTICE** that the Board of County Commissioners does not wish to be lobbied, either individually or collectively about a project for which a firm has submitted a Proposal.

Firms and their agents are not to contact members of the County Commission for such purposes as meeting or introduction, luncheons, dinners, etc. During the process, **from Proposal closing to**

final Board approval, no firm or their agent shall contact any other employee of Collier County in 6 reference to this Proposal, with the exception of the Procurement Director or his designee(s). Failure to abide by this provision may serve as grounds for disqualification for award of this contract to the firm.

14. Public Records Compliance

The Vendor/Contractor agrees to comply with the Florida Public Records Law Chapter 119 (including specifically those contractual requirements at F.S. § 119.0701(2) (a)-(d) and (3)), ordinances, codes, rules, regulations and requirements of any governmental agencies.

15. Certificate of Authority to Conduct Business in the State of Florida (Florida Statute 607.1501)

In order to be considered for award, firms must be registered with the Florida Department of State Divisions of Corporations in accordance with the requirements of Florida Statute 607.1501 and provide a certificate of authority (www.sunbiz.org/search.html) prior to execution of a contract. A copy of the document may be submitted with the solicitation response and the document number shall be identified. Firms who do not provide the certificate of authority at the time of response shall be required to provide same within five (5) days upon notification of selection for award. If the firm cannot provide the document within the referenced timeframe, the County reserves the right to award to another firm.

16. Single Proposal

Each Vendor must submit, with their proposal, the required forms included in this RFP. Only **one** proposal from a legal entity as a primary will be considered. A legal entity that submits a proposal as a primary or as part of a partnership or joint venture submitting as primary may not then act as a subconsultant to any other firm submitting under the same RFP. If a legal entity is not submitting as a primary or as part of a partnership or joint venture as a primary, that legal entity may act as a subconsultant to any other firm or firms submitting under the same RFP. All submittals in violation of this requirement will be deemed non-responsive and rejected from further consideration.

17. Survivability

Purchase Orders: The Consultant/Contractor/Vendor agrees that any Purchase Order that extends beyond the expiration date of the original Solicitation 16-6563 will survive and remain subject to the terms and conditions of that Agreement until the completion or termination of this Purchase Order.

18. Protest Procedures

Any prospective vendor / proposer who desires to protest any aspect(s) or provision(s) of the solicitation (including the form of the solicitation documents or procedures) shall file their protest with the Procurement Director prior to the time of the bid opening strictly in accordance with the County's then current purchasing ordinance and policies.

The Board of County Commissioners will make award of contract in public session. Award recommendations will be posted outside the offices of the Purchasing Department on Wednesdays and Thursdays. Any actual or prospective respondent who desires to formally protest the recommended contract award must file a notice of intent to protest with the Procurement Director within two (2) calendar days (excluding weekends and County holidays) of the date that the recommended award is posted.

Upon filing of said notice, the protesting party will have five (5) days to file a formal protest and will be given instructions as to the form and content requirements of the formal protest. A copy of the "Protest Policy" is available at the office of the Procurement Director.

19. Public Entity Crime

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 bid, proposal, or reply on a contract to provide any goods or services to a public entity; may not submit a bid, proposal, or reply on a contract with a public entity for the construction or repair of a public building or public work; may not submit bids, proposals, or replies on leases of 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 s. 287.017 for CATEGORY TWO for a period of 36 months following the date of being placed on the convicted vendor list.

20. Security and Background Checks

If required, Vendor / Contractor / Proposer shall be responsible for the costs of providing background checks by the Collier County Facilities Management Department, and drug testing for all employees that shall provide services to the County under this Agreement. This may include, but not be limited to, checking federal, state and local law enforcement records, including a state and FBI fingerprint check, credit reports, education, residence and employment verifications and other related records. Contractor shall be required to maintain records on each employee and make them available to the County for at least four (4) years.

21. Conflict of Interest

Vendor shall complete the Conflict of Interest Affidavit included as an attachment to this RFP document. Disclosure of any potential or actual conflict of interest is subject to County staff review and does not in and of itself disqualify a firm from consideration. These disclosures are intended to identify and or preclude conflict of interest situations during contract selection and execution.

22. Prohibition of Gifts to County Employees

No organization or individual shall offer or give, either directly or indirectly, any favor, gift, loan, fee, service or other item of value to any County employee, as set forth in Chapter 112, Part III, Florida Statutes, the current Collier County Ethics Ordinance and County Administrative Procedure 5311. Violation of this provision may result in one or more of the following consequences: a. Prohibition by the individual, firm, and/or any employee of the firm from contact with County staff for a specified period of time; b. Prohibition by the individual and/or firm from doing business with the County for a specified period of time, including but not limited to: submitting bids, RFP, and/or quotes; and, c. immediate termination of any contract held by the individual and/or firm for cause.

23. Immigration Affidavit Certification

Statutes and executive orders require employers to abide by the immigration laws of the United States and to employ only individuals who are eligible to work in the United States.

The Employment Eligibility Verification System (E-Verify) operated by the Department of Homeland Security (DHS) in partnership with the Social Security Administration (SSA), provides an Internet-based means of verifying employment eligibility of workers in the United States; it is not a substitute

for any other employment eligibility verification requirements. The program will be used for Collier County formal Invitations to Bid (ITB) and Request for Proposals (RFP) including professional services and construction services.

Exceptions to the program:

- Commodity based procurement where no services are provided.
- Where the requirement for the affidavit is waived by the Board of County Commissioners

Vendors / Bidders are required to enroll in the E-Verify program, and provide acceptable evidence of their enrollment, at the time of the submission of the vendor's/bidder's proposal. Acceptable evidence consists of a copy of the properly completed E-Verify Company Profile page or a copy of the fully executed E-Verify Memorandum of Understanding for the company. Vendors are also required to provide the Collier County Purchasing Department an executed affidavit certifying they shall comply with the E-Verify Program. The affidavit is attached to the solicitation documents. If the Bidder/Vendor does not comply with providing both the acceptable E-Verify evidence and the executed affidavit the bidder's / vendor's proposal may be deemed non-responsive.

Additionally, vendors shall require all subcontracted vendors to use the E-Verify system for all purchases not covered under the "Exceptions to the program" clause above.

For additional information regarding the Employment Eligibility Verification System (E-Verify) program visit the following website: http://www.dhs.gov/E-Verify. It shall be the vendor's responsibility to familiarize themselves with all rules and regulations governing this program.

Vendor acknowledges, and without exception or stipulation, any firm(s) receiving an award shall be fully responsible for complying with the provisions of the Immigration Reform and Control Act of 1986 as located at 8 U.S.C. 1324, et seq. and regulations relating thereto, as either may be amended and with the provisions contained within this affidavit. Failure by the awarded firm(s) to comply with the laws referenced herein or the provisions of this affidavit shall constitute a breach of the award agreement and the County shall have the discretion to unilaterally terminate said agreement immediately.

24. Collier County Local Preference Policy

Collier County provides an incentive to local business to enhance the opportunities of local businesses in the award of County contracts. In the evaluation of proposals, the County rewards Vendors for being a local business by granting a ten (10) points incentive in the evaluation criterion points.

Local business means the vendor has a current Business Tax Receipt issued by the Collier County Tax Collector for at least one year prior to bid or proposal submission to do business within Collier County, and that identifies the business with a permanent physical business address located within the limits of Collier County from which the vendor's staff operates and performs business in an area zoned for the conduct of such business. A Post Office Box or a facility that receives mail, or a non-permanent structure such as a construction trailer, storage shed, or other non-permanent structure shall not be used for the purpose of establishing said physical address. In addition to the foregoing, a vendor shall not be considered a "local business" unless it contributes to the economic development and well-being of Collier County in a verifiable and measurable way. This may include, but not be limited to, the retention and expansion of employment opportunities, support and increase to the County's tax base, and residency of employees and principals of the business within Collier County. Vendors shall affirm in writing their compliance with the foregoing at the time of submitting their bid or proposal to be eligible for consideration as a "local business" under this section. A vendor who

misrepresents the Local Preference status of its firm in a proposal or bid submitted to the $content{content}{content}$ will lose the privilege to claim Local Preference status for a period of up to one year. Under this solicitation proposers desiring to receive local preference will be invited and required to affirmatively state and provide documentation as set forth in the solicitation in support of their status as a local business. Any proposer who fails to submit sufficient documentation with their proposal offer shall not be granted local preference consideration for the purposes of that specific contract award. Except where federal or state law, or any other funding source, mandates to the contrary, Collier County and its agencies and instrumentalities, will give preference to local businesses in the following manner.

For all purchases of commodities and services procured through a competitive proposal process and not otherwise exempt from this local preference section, the solicitation shall include a weighted criterion for local preference that equals 10 percent of the total points in the evaluation criteria published in the solicitation. Purchases of professional services as defined and identified under subsection 11B.2 (which are subject to Section 287.055, F.S.) and subsection 11B.3 (which are subject to Section 11.45, F.S.) shall not be subject to this local preference section.

The vendor must complete and submit with their proposal response the *Affidavit for Claiming Status* as a *Local Business* which is included as part of this solicitation.

Failure on the part of a vendor to submit this Affidavit with their proposal response will preclude said Vendor from being considered for local preference under this solicitation.

A vendor who misrepresents the Local Preference status of its firm in a proposal or bid submitted to the County will lose the privilege to claim Local Preference status for a period of up to one year.



Attachment 1: Vendor's Non-Response Statement

The sole intent of the Collier County Purchasing Department is to issue solicitations that are clear, concise and openly competitive. Therefore, we are interested in ascertaining reasons for prospective Vendors not wishing to respond to this solicitation. If your firm is not responding to this RFP, please indicate the reason(s) by checking the item(s) listed below and return this form via email or fax, noted on the cover page, or mail to Collier County Government, Purchasing Department, 3327 Tamiami Trail E, Naples, FL 34112.

We are not responding to Solicitation 16-6563 – TDC Research Services for the following reason(s): Services requested not available through our company. Our firm could not meet specifications/scope of work. Specifications/scope of work not clearly understood or applicable (too vague, rigid, etc.) Project is too small. Insufficient time allowed for preparation of response. Incorrect address used. Please correct mailing address: Other reason(s): Name of Firm: Address: City, State, Zip: Telephone: Email: Representative Signature:

_____Date ____

Representative Name:



Attachment 2: Vendor Check List

indic		TBE SIGNED. Please read carefully, sign in the spaces roposal. Vendor should check off each of the following items as the	
	The Proposal has been signed	ed.	
	All applicable forms have be requirements of the project.	en signed and included, along with licenses to complete the	
	Any addenda have been sign	ned and included.	
	The mailing envelope has be Collier County Gove Purchasing Departr 3327 Tamiami Trail Naples FL 34112 Attn: Adam Northru	rnment nent	
	The mailing envelope <u>must</u> be <u>sealed</u> and <u>marked</u> with Solicitation 16-6563 – TDC Research Services and 1/29/2016.		
	The Proposal will be mailed or delivered in time to be received no later than the specified <u>due date and time</u> . (Otherwise Proposal cannot be considered.)		
	If submitting a manual bid, include any addenda (initialed and dated noting understanding and receipt). If submitting bid electronically, bidder will need to download all related documents on www.colliergov.net/bid. The system will date and time stamp when the addendum files were downloaded.		
	COURIER-DELIVERED PRO SIDE OF THE COURIER PAG	POSALS MUST HAVE THE <u>RFP NUMBER AND TITLE ON THE</u> CKET.	
Name	e of Firm:		
Address:			
City,	State, Zip:		
Telep	phone:		
Emai	l:		
Repr	esentative Signature:		
Representative Name:		Date	



Attachment 3: Conflict of Interest Affidavit

By the signature below, the firm (employees, officers and/or agents) certifies, and hereby discloses, that, to the best of their knowledge and belief, all relevant facts concerning past, present, or currently planned interest or activity (financial, contractual, organizational, or otherwise) which relates to the proposed work; and bear on whether the firm (employees, officers and/or agents) has a possible conflict have been fully disclosed.

Additionally, the firm (employees, officers and/or agents) agrees to immediately notify in writing the Procurement Director, or designee, if any actual or potential conflict of interest arises during the contract and/or project duration.

Firm:	
Signature and Date:	
Print Name	
Title of Signatory	
State of	
County of	
SUBSCRIBED AND SWORN to before me this 20,	s,
by	, who is personally known to me to be the for the Firm, OR who produced the following
identification	<u> </u>
Notary Public	
My Commission Expires	



Attachment 4: Vendor Declaration Statement

BOARD OF COUNTY COMMISSIONERS Collier County Government Complex Naples, Florida 34112

RE: Solicitation: 16-6563 - TDC Research Services

Dear Commissioners:

The undersigned, as Vendor declares that this proposal is made without connection or arrangement with any other person and this proposal is in every respect fair and made in good faith, without collusion or fraud.

The Vendor agrees, if this proposal is accepted, to execute a Collier County document for the purpose of establishing a formal contractual relationship between the firm and Collier County, for the performance of all requirements to which the proposal pertains. The Vendor states that the proposal is based upon the proposal documents listed by **Solicitation: 16-6563 – TDC Research Services.**

(Proposal Continued on Next Page)

PROPOSAL CONTINUED

	nave hereunto subscribed our names on this day of , in the State of	, 20
Firm's Legal Name:		
Address:		
City, State, Zip Code:		
Florida Certificate of Authority Document Number: Federal Tax Identification Number CCR # or CAGE Code Telephone:		
FAX:		
Signature by: (Typed and written) Title:		
Send payments to:	Additional Contact Information	
(required if different from above)	Company name used as payee	
Contact name:	-	
Title:		
Address:		
City, State, ZIP		
Telephone:		
FAX:		
Email:		
Office servicing Collier County to place orders (required if different from above) Contact name:		
Title:		
Address:		
City, State, ZIP		
Telephone:	Email	



Attachment 5: Affidavit for Claiming Status as a Local Business

Solicitation: 16-6563 - TDC Research Services (Check Appropriate Boxes Below) State of Florida (Select County if Vendor is described as a Local Business ☐ Collier County ☐ Lee County Vendor affirms that it is a local business as defined by the Purchasing Policy of the Collier County Board of County Commissioners and the Regulations Thereto. As defined in Section XI of the Collier County Purchasing Policy: Local business means the vendor has a current Business Tax Receipt issued by the Collier County Tax Collector for at least one year prior to bid or proposal submission to do business within Collier County, and that identifies the business with a permanent physical business address located within the limits of Collier County from which the vendor's staff operates and performs business in an area zoned for the conduct of such business. A Post Office Box or a facility that receives mail, or a non-permanent structure such as a construction trailer, storage shed, or other non-permanent structure shall not be used for the purpose of establishing said physical address. In addition to the foregoing, a vendor shall not be considered a "local business" unless it contributes to the economic development and well-being of Collier County in a verifiable and measurable way. This may include, but not be limited to, the retention and expansion of employment opportunities, support and increase to the County's tax base, and residency of employees and principals of the business within Collier County. Vendors shall affirm in writing their compliance with the foregoing at the time of submitting their bid or proposal to be eligible for consideration as a "local business" under this section. A vendor who misrepresents the Local Preference status of its firm in a proposal or bid submitted to the County will lose the privilege to claim Local Preference status for a period of up to one year. Vendor must complete the following information: Year Business Established in ☐Collier County or ☐ Lee County: _____ Number of Employees (Including Owner(s) or Corporate Officers): Number of Employees Living in Collier County or Lee (Including Owner(s) or Corporate Officers): If requested by the County, vendor will be required to provide documentation substantiating the information given in this affidavit. Failure to do so will result in vendor's submission being deemed not applicable. Vendor Name: _____ Collier or Lee County Address: Signature: STATE OF FLORIDA COLLIER COUNTY ☐ LEE COUNTY Sworn to and Subscribed Before Me, a Notary Public, for the above State and County, on this Day of _____, 20_____. Notary Public My Commission Expires: _____

(AFFIX OFFICIAL SEAL)



Attachment 6: Immigration Affidavit Certification

Solicitation: 16-6563 - TDC Research Services

274A(e) of the Immigration and Nationality Act ("INA").

This Affidavit is required and should be signed, notarized by an authorized principal of the firm and submitted with formal Invitations to Bid (ITB's) and Request for Proposals (RFP) submittals. Further, Vendors / Bidders are required to enroll in the E-Verify program, and provide acceptable evidence of their enrollment, at the time of the submission of the vendor's/bidder's proposal. Acceptable evidence consists of a copy of the properly completed E-Verify Company Profile page or a copy of the fully executed E-Verify Memorandum of Understanding for the company. Failure to include this Affidavit and acceptable evidence of enrollment in the E-Verify program, may deem the Vendor / Bidder's proposal as non-responsive.

Collier County will not intentionally award County contracts to any vendor who knowingly employs unauthorized alien workers, constituting a violation of the employment provision contained in 8 U.S.C. Section 1324 a(e) Section

Collier County may consider the employment by any vendor of unauthorized aliens a violation of Section 274A (e) of the INA. Such Violation by the recipient of the Employment Provisions contained in Section 274A (e) of the INA shall be grounds for unilateral termination of the contract by Collier County.

Vendor attests that they are fully compliant with all applicable immigration laws (specifically to the 1986 Immigration Act and subsequent Amendment(s)) and agrees to comply with the provisions of the Memorandum of Understanding with E-Verify and to provide proof of enrollment in The Employment Eligibility Verification System (E-Verify), operated by the Department of Homeland Security in partnership with the Social Security Administration at the time of submission of the Vendor's / Bidder's proposal.

Company Name				
Print Name		Title _		
Signature		Date _		
State of				
County of				
The foregoing instrument wa	as signed and acknow	/ledged before me this _	day of	,
	who has produced		as identification.	
(Print or Type Name)		(Type of Identification and Nu	mber)	
Notary Public Signature				
Printed Name of Notary Public				
Notary Commission Number/Expir	ration			

The signee of this Affidavit guarantees, as evidenced by the sworn affidavit required herein, the truth and accuracy of this affidavit to interrogatories hereinafter made.



Attachment 7: Vendor Substitute W – 9 Request for Taxpayer Identification Number and Certification

In accordance with the Internal Revenue Service regulations, Collier County is required to collect the following information for tax reporting purposes from individuals and companies who do business with the County (including social security numbers if used by the individual or company for tax reporting purposes). Florida Statute 119.071(5) require that the county notify you in writing of the reason for collecting this information, which will be used for no other purpose than herein stated. Please complete all information that applies to your business and return with your quote or proposal.

Taxpayer Name					
(as shown on income tax Business Name	return)				
(if different from taxpayer	name)				
Address		C	ity		
State					
relepnone	FAX			Email	
Order Information		R	emit / Payme	ent Information	
Address		A	ddress		
City State _	Zip			State	
FAX		F			
Email		"	IIIaii		
Email			aii		
Company Status (check	k only one)				
	k only one)	Corporation		Partnersh	
Company Status (checkIndividual / Sole PropTax Exempt (Federal	k only one) rietor	_Corporation			
Company Status (check Individual / Sole Prop Tax Exempt (Federal under Internal Reven	k only one) rietor	_Corporation	Limited Li	Partnershability Company	nip
Company Status (checkIndividual / Sole PropTax Exempt (Federal	k only one) rietor	_Corporation	Limited Li	Partnersh ability Company er the tax classificati	nip
Company Status (check Individual / Sole Prop Tax Exempt (Federal under Internal Reven	k only one) rietor	_Corporation	Limited Li	Partnersh ability Company er the tax classificati	nip
Company Status (check Individual / Sole Prop Tax Exempt (Federal under Internal Revention 501 (c) 3)	k only one) rietor I income tax-exempue Service guidelin	_Corporation ot entity es IRC	Limited LiEnte	Partnersh ability Company er the tax classificati garded Entity, C = Co	nip
Company Status (check Individual / Sole Prop Tax Exempt (Federal under Internal Revention 501 (c) 3)	k only one) rietor I income tax-exempue Service guidelin	_Corporation ot entity es IRC	Limited Li Ente (D = Disre urposes only	Partnersh ability Company er the tax classificati garded Entity, C = Co	on rporation, P = Partnership)
Company Status (check Individual / Sole Prop Tax Exempt (Federal under Internal Reven	rietor income tax-exempue Service guidelin	Corporation of entity es IRC reporting pu	Limited LiEnte(D = Disre urposes only	Partnersh ability Company er the tax classificati garded Entity, C = Co	nip on rporation, P = Partnership)
Company Status (check Individual / Sole Prop Tax Exempt (Federal under Internal Revent 501 (c) 3) Taxpayer Identification Federal Tax Identification	rietor income tax-exempue Service guidelin Number (for tax	_Corporation ot entity es IRC reporting pu	Limited Li Ente (D = Disre urposes only	ability Company er the tax classificati garded Entity, C = Co	on rporation, P = Partnership)
Company Status (check Individual / Sole Prop Tax Exempt (Federal under Internal Revention) 501 (c) 3)	rietor income tax-exempue Service guidelin Number (for tax	_Corporation ot entity es IRC reporting pu	Limited Li Ente (D = Disre urposes only	ability Company er the tax classificati garded Entity, C = Co	on rporation, P = Partnership)
Company Status (check Individual / Sole Prop Tax Exempt (Federal under Internal Revention) 501 (c) 3) Faxpayer Identification Federal Tax Identification (Vendors who do not have	rietor income tax-exempue Service guidelin Number (for tax	_Corporation ot entity es IRC reporting pu	Limited Li Ente (D = Disre urposes only	ability Company er the tax classificati garded Entity, C = Co	on rporation, P = Partnership)
Company Status (check Individual / Sole Prop Tax Exempt (Federal under Internal Revent 501 (c) 3) Taxpayer Identification Federal Tax Identification	rietor rietor rictor rictor	Corporation of entity es IRC reporting pu	Limited Li Ente (D = Disre urposes only e a social sec	Partnersh ability Company er the tax classificati garded Entity, C = Co	on rporation, P = Partnership) an award of the contract.)
Company Status (check Individual / Sole Prop Tax Exempt (Federal under Internal Revention) 501 (c) 3) Taxpayer Identification Federal Tax Identification (Vendors who do not have	rietor rietor rictor rictor	Corporation of entity es IRC reporting pu	Limited Li Ente (D = Disre urposes only e a social sec	Partnersh ability Company er the tax classificati garded Entity, C = Co	on rporation, P = Partnership) an award of the contract.) rrect to my knowledge.
Company Status (check Individual / Sole Prop Tax Exempt (Federal under Internal Revent 501 (c) 3) Faxpayer Identification Federal Tax Identification (Vendors who do not have Sign and Date Form Certification: Under penali	rietor rietor rictor rictor	Corporation of entity es IRC reporting pu	Limited Li Ente (D = Disre urposes only e a social sec	Partnersh ability Company er the tax classificati garded Entity, C = Co	on rporation, P = Partnership) an award of the contract.)



Attachment 8: Insurance and Bonding Requirements

Ins	urance / Bond Type	Required Limits			
1.		Statutory Limits of Florida Statutes, Chapter Statutory Limits and Requirements	440 and all Fe	ederal Government	
2.	□ Employer's Liability	\$100,000 single limit per occurrence			
3.	□ Commercial General Liability (Occurrence Form)	Bodily Injury and Property Damage			
	patterned after the current ISO form	\$1,000,000 single limit per occurrence, \$2,000,000 aggregate for Bodily Injury Liability and Property Damage Liability. This shall include Premises and Operations; Independent Contractors; Products and Completed Operations and Contractual Liability			
4.		To the maximum extent permitted by Florida law, the Contractor/Vendor/Consultant shall indemnify and hold harmless Collier County, its officers and employees from any and all liabilities, damages, losses and costs, including, but not limited to, reasonable attorneys' fees and paralegals' fees, to the extent caused by the negligence, recklessness, or intentionally wrongful conduct of the Contractor/Vendor/Consultant or anyone employed or utilized by the Contractor/Vendor/Consultant in the performance of this Agreement. This indemnification obligation shall not be construed to negate, abridge or reduce any other rights or remedies which otherwise may be available to an indemnified party or person described in this paragraph. This section does not pertain to any incident arising from the sole negligence of Collier County.			
4.	Automobile Liability	\$ 500,000 Each Occurrence; Bodily Injury & F Owned/Non-owned/Hired; Automobile Include		ge,	
5.	Other insurance as	☐ Watercraft	\$	Per Occurrence	
J.	noted:	☐ United States Longshoreman's and Harborworker's Act coverage shall be maintained where applicable to the completion of the work. \$ Per Occurrence			
		☐ Maritime Coverage (Jones Act) shall be maintained where applicable to			
		the completion of the work.		Per Occurrence	
		Aircraft Liability coverage shall be carried in limits of not less than \$5,000,000 each occurrence if applicable to the completion of the Services under this Agreement.			
		Ç	\$	_ Per Occurrence	
		Pollution	\$	_ Per Occurrence	
		 Professional Liability \$ 500,000 each claim and in the agg \$1,000,000 each claim and in the agg \$2,000,000 each claim and in the agg 	regate gregate	Per Occurrence	
		☐ Professional Liability	\$	per claim and in the aggregate	
		 \$1,000,000 per claim and in the aggregate \$2,000,000 per claim and in the aggregate 			

March 28, 2016 New Business 7-c 38 of 156

			\$	Per Occurrence	
		☐ Employee Dishonesty / Crime Including Employee Theft, Funds T Payee endorsement naming Collier C		Per Occurrence , Include a Joint Loss	
6.	☐ Bid bond	Shall be submitted with proposal response in the form of certified funds, cashiers' check or an irrevocable letter of credit, a cash bond posted with the County Clerk, or proposal bond in a sum equal to 5% of the cost proposal. All checks shall be made payable to the Collier County Board of County Commissioners on a bank or trust company located in the State of Florida and insured by the Federal Deposit Insurance Corporation.			
7.	Performance and Payment Bonds	For projects in excess of \$200,000, bonds shall be submitted with the executed contract by Proposers receiving award, and written for 100% of the Contract award amount, the cost borne by the Proposer receiving an award. The Performance and Payment Bonds shall be underwritten by a surety authorized to do business in the State of Florida and otherwise acceptable to Owner; provided, however, the surety shall be rated as "A-" or better as to general policy holders rating and Class V or higher rating as to financial size category and the amount required shall not exceed 5% of the reported policy holders' surplus, all as reported in the most current Best Key Rating Guide, published by A.M. Best Company, Inc. of 75 Fulton Street, New York, New York 10038.			
8.		Vendor shall ensure that all subcontractors comply with the same insurance requirements that he is required to et. The same Vendor shall provide County with certificates of insurance meeting the required insurance visions.			
9.	☐ Collier County must be named as "ADDITIONAL INSURED" on the Insurance Certificate for Commercial General Liability where required.				
10.	10. The Certificate Holder shall be named as Collier County Board of County Commissioners, OR, Board of County Commissioners in Collier County, OR Collier County Government, OR Collier County. The Certificates of Insurance must state the Contract Number, or Project Number, or specific Project description, or must read: For any and all work performed on behalf of Collier County.				
	☑ Thirty (30) Days C a A 1/6/2016	ancellation Notice required.			
	e understand the insuranc hin five (5) days of the aw	Vendor's Insurance Statements of these specifications and the ward of this solicitation.		of insurability may be required	
Na	me of Firm	D)ate		
Vei	ndor Signature				
Pri	nt Name				
Ins	urance Agency				
Agent Name Telephone Number			ber		

March 28, 2016 New Business 7-c 39 of 156



Attachment 9: Reference Questionnaire

Reference	tion: ce Questionnaire for:		
(Nam	ne of Company Requesting Reference Information)		
(Nam	ne of Individuals Requesting Reference Information)		
Name: (E	Company: Evaluator completing reference questionnaire) (Evaluator's C	Company completing reference)	
Email:		elephone:	
in the se a client for best of y firm/indiv If you do be score		the Subject above has listed you as by. Please rate each criteria to the cry satisifed (and would hire the never hire the firm/indivdiual again).	
•	Budget: Project Number of Days:		
	Orders - Dollars Added : = Change Orders - Days A	dded:	
Item	Citeria	Score	
1	Ability to manage the project costs (minimize change orders to scope).		
2	Ability to maintain project schedule (complete on-time or early).		
3	Quality of work.		
4	Quality of consultative advice provided on the project.		
5			
6	Project administration (completed documents, final invoice, final product turnover; invoices; manuals or going forward documentation, etc.)		
7	7 Ability to verbally communicate and document information clearly and succinctly.		
8	8 Abiltity to manage risks and unexpected project circumstances.		
9	9 Ability to follow contract documents, policies, procedures, rules, regulations, etc.		
10	Overall comfort level with hiring the company in the future (customer satis	sfaction).	
	TOTAL SCORE OF ALL ITEMS		
Please F	FAX this completed survey to:	Bv	



RFP Number: 16-6563



Dynamic Data for Decision Making!

Research Data Services, Inc.

777 South Harbour Island Boulevard Suite 260 Tampa, Florida 33602

> Phone: (813) 254-2975 Fax: (813) 223-2986

 $www. Research Data LLC. com \\WJK lages@Research Data LLC. com$

February 2, 2016



Table of Contents

TAB I: COVER LETTER/MANAGEMENT SUMMARY2				
TAB II: BUSINESS PLAN4				
1. Proposed Contract Team				
2. Organizational Structure				
3. Timeline for Delivery of Each Task				
4. Creative Ideas for Collecting Data, Interviewing Techniques, and				
Reporting Delivery				
5. Processes/Procedures for Quality Control and Project Management13				
6. Project Approach18				
7. Detailed Scope of Work21				
Task 1a: Visitor Profile Study: Commercial Lodging (H/M/C/C)21				
Task 1b: Visitor Impact Study: In-Home (V F/R)29				
Task 1c: Visitor Impact Study: Regional (Day-Tripper)30				
Task 2: Hotel Occupancy and Average Daily Rate Study31				
Task 3: Impact of Tourism Study				
Task 4. Inquiry Conversion Study				
Task 5: Focus Group Research				
TAB III: COST OF SERVICES TO THE COUNTY40				
Research Budget: Annual Pricing Model				
a. Core Services40				
b. Out of Pocket Fees41				
c. Fee Schedule for Billing Special Projects41				
TAB IV: EXPERIENCE AND CAPACITY OF FIRM42				
1. RDS's Unique Qualifications				
2. Skills, Abilities, Expertise, and Availability of Staff Assigned to Study 44				
a. Project Team44				
b. Subcontractors				
3. RDS's Technical Capacities to Meet Scope of Services45				
4. Financial Strength and Sufficient Credit				
5. Tourism, Travel, and Hospitality Projects				
6. Other Clients				
TAB V: SPECIALIZED EXPERTISE OF TEAM MEMBERS50				
1. Résumé of Proposed Account Manager				
2. Experience Matrix				
3. Leadership Team52 Affiliated Advisors58				
Affiliated Advisors				
TAB VI: REFERENCES60				
TAB VII. ACCEPTANCE OF CONDITIONS 61				
TAB VIII: REQUIRED FORM SUBMITTALS63				



I. Cover Letter/Management Summary



Tab I: Cover Letter/Management Summary

February 1, 2016

Mr. Adam Northrup, Procurement Strategist
Collier County Government
Purchasing Department
3327 Tamiami Trail East
Naples, Florida 34112

RE: RFP NUMBER: 16-6563

Request for Proposal -- TDC Research Services

Dear Mr. Northrup:

Thank you very much for the opportunity to submit Research Data Services, Inc.'s (RDS) response to the Naples, Marco Island, Everglades Convention and Visitors Bureau's (CVB's) Request for Proposal for market research services [RFP#: 16-6563].

Our expertise, skill, and performance in providing marketing, economic, and statistical research services are well recognized in the tourism industry. Our team's experience brings unique credentials and talents to the tasks germane to the scope of the proposal. Preparing this RFP has been both interesting and challenging. We are excited by the opportunity to develop the many new ideas and innovative research programs that the changing marketing needs of the Bureau will require in the years to come.

Our assignment is not just to report numbers, but to interpret them in the context of how they can be used to leverage positive benefits for the County. RDS recommends continuation of Collier's core research projects and tasks because this foundation allows for long term tracking and comparisons and can identify trends with marketing potential for the destination. Without tracking, one can neither gauge the causes nor the magnitude of change. We are not, however, standing still. We continually refine and streamline our approaches to make the information as actionable and cost effective as possible.

For all projects, every effort will be made to meet the Criteria for Advertising and Marketing Research promulgated by the Advertising Research Foundation and the American Marketing Association (AMA). RDS agrees to provide and perform all services in accordance with the generally accepted standards of professional and ethical research practices and codes of conduct established by CASRO and the AMA.



To protect our clients' interests, all information we will develop or have furnished to us during our projects remains totally confidential and will be safeguarded in accordance with our established professional standards.

RDS will perform all research services in-house. Although no subcontractors or subconsultants will be used, RDS maintains relationships with numerous advisors whose expertise can be called upon as needed. Dr. Walter Klages, President of RDS, will direct the project, overseeing all aspects of research, and functioning as Executive-in-Charge.

I trust that the following proposal fully addresses the scope and research objectives defined in your RFP. I hereby certify that if this proposal is selected, Research Data Services, Inc. will accept any awards offered by Collier County as a result of this RFP. Thank you again for your consideration.

Sincerely

Walter J. Klages, Ph.D., President

Research Data Services, Inc.

777 South Harbour Island Boulevard, Suite 260

Tampa, Florida 33602 Phone: (813) 254-2975 Fax: (813) 223-2986

Email: WJKlages@KlagesGroup.com or Research@KlagesGroup.com



II. Business Plan

IN THIS SECTION:

- Proposed Contract Team
- Organizational Structure
- Timeline for Delivery of Each Task
- Creative Ideas for Collecting Data, Interviewing Techniques, and Reporting Delivery
- Processes/Procedures for Quality Control and Project Management
- Project Approach
- Detailed Scope of Work
 - Visitor Profile Study: Commercial Lodging (H/M/C/C)
 - Visitor Impact Study: In-Home (V F/R)
 - Visitor Impact Study: Regional (Day-Tripper)
 - Hotel Occupancy and Average Daily Rate Study
 - Impact of Tourism Study
 - Inquiry Conversion Study
 - Focus Group Research



Tab II: Business Plan

1. Proposed Contract Team

Thirteen (13) Research Data Services professionals have been assigned to this project. Walter J. Klages, Ph.D., President of RDS will direct the project. The core team assigned to this project has successfully cooperated on RDS destination research projects for over two decades. RDS' contract team that will be assigned to the Naples, Marco Island, Everglades Convention and Visitors Bureau research includes:

Walter J. Klages, Ph.D.: Since 1979, Dr. Walter Klages, President of RDS, has worked with a variety of clients providing the marketing intelligence needed to insure their bottom-line R.O.I. Dr. Klages has provided market research services to destinations and CVB's since he started RDS as a business. He brings comprehensive experience and vision to destination research services for the tourism industry.

Dr. Klages has designed, executed, analyzed, and presented research results for over 30 years. His research experience covers a diversity of projects including branding, concept development, market positioning, and performance assessments.

Dr. Klages has pioneered many of the "best practices" for destination market research and visitor studies. He specializes in supporting CVB's in building successful marketing strategies, boosting destinations' R.O.I. performance, and increasing hotel occupancy and RevPAR.

He will direct the Collier County project and function as Executive-in-Charge. Dr. Klages will oversee all aspects of research and be the primary point of contact for the CVB.

Claire Klages: Ms. Klages is Vice President of Qualitative Research Services. She will be in charge of focus group implementation for this project and will assume project supervisory responsibilities.

Ms. Klages has over twenty five years of moderating experience. She has conducted thousands of focus groups and in-depth interviews. She has completed extensive specialized training, including QRCA courses in 'Qualitative Market Research' and 'Moderating Skills', as well as 'hands on' training. Her work has run the gamut of qualitative and quantitative techniques using a broad variety of innovative interview methods. She delights in creating projective qualitative approaches that delve into customers' and employees' thinking to uncover new and actionable insights, and is a firm believer in integrating data from multiple sources to isolate and validate key insights and provide a holistic view.



Anne Wittine: Ms. Wittine will function as liaison between Bureau staff and RDS and will supervise research analysis. Ms. Wittine manages customer-focused intelligence, insight, and analytical solutions across all client engagements. She is responsible for the overall management of project deliverables, including quality assurance. Other responsibilities include increasing productivity and efficiency in the tabulation and report planning process, and supervising the coding department. She is involved in programming statistical tabulation software and database management.

Andrea Johnston: Ms. Johnston functions as Research Manager at RDS. She is involved in the scheduling and management of the collection of primary and secondary data for our clients. She spearheads the production of client reports, compiling focus group results, data coding and analysis, supervision of the field-research team, questionnaire logic testing, and general data verification and editing. She will also be engaged in preparing presentations for the Bureau.

Nicole Grates: Ms. Grates functions as Project Director at RDS. She has extensive experience in both qualitative and quantitative data analysis. She is involved in writing client reports and compiling focus group results.

Ann F. Harrison: Ms. Harrison develops psychometric lifestyle models (regression/time series) and helps to produce RDS's long-term forecasts for our clients. She is responsible for developing interactive database management systems (using SPSS macros) for the manipulation of statistical data.

Jazmine Rizzo: Ms. Rizzo is an analyst with RDS. She is involved in programming statistical tabulation software and database management. She has extensive experience with SPSS, WinCross, Access, and Excel. She is well versed in qualitative and quantitative methodologies including computer-assisted telephone interviewing, face-to-face intercepts, and online panels. **She is fluent in Spanish.**

Janet Home: Ms. Home is the Quality Supervisor for RDS. She joined RDS's team in 1999 and brings to the table wide-ranging experiences in finance and business management. She is extremely accurate and detail oriented. She oversees the verification and validation of RDS's project data as well as being involved in the econometric forecasting and modeling for our clients.

Arlyse McDowell: Ms. McDowell is the Field Services Manager for RDS. She brings broad-based experience in counseling, teaching, and managing diverse groups of children and adults of all ages and backgrounds. At RDS, she is involved in the collection and management of primary and secondary data and the training and supervision of information takers. Ms. McDowell's experience and background makes her highly skilled at capturing the essence of consumers' motivations and opinions.



Lisa Terian: Ms. Terian is a Field Supervisor for RDS. She is involved in the collection of primary and secondary data and the supervision of data collection. Prior to joining RDS in 2014, Ms. Terian's broad based hospitality experience gave her significant insight into the tourism industry and guest relations. With RDS, she uses her strong team building and interpersonal skills to ensure the quality of our data collection efforts. **Ms. Terian is a Collier resident.**

Michele Boone: Ms. Boone coordinates RDS's contacts with the tourism industry and collects primary occupancy, average daily rate, and related information. She joined RDS in 2012, bringing extensive experience in accounting, human resources, and customer service/outreach.

Margot George: Ms. George has been a Visitor Profile Specialist with RDS since 2008. She collects primary visitor data. Ms. George has extensive experience in customer and public relations and loves talking to people. **She speaks German.**

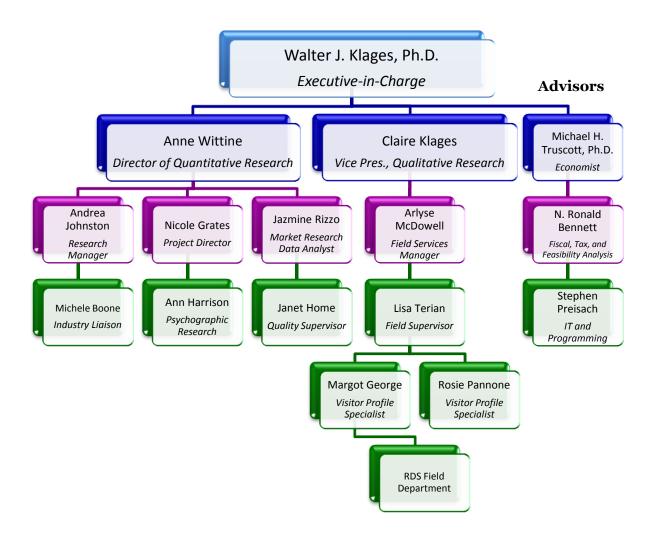
Rosie Pannone: Ms. Pannone is a Visitor Profile Specialist for RDS. She is involved in the collection of primary and secondary data. Ms. Pannone has been with RDS since 2001. She comes to us with extensive experience in the travel and hospitality industry. She loves the opportunity to talk to people and is very comfortable interacting with consumers from all walks of life.





2. Organizational Structure

The following organizational structure for this project details the roles to be played by each member of the project team:



3. Timeline for Delivery of Each Task

Task 1a: Visitor Profile Study: Commercial Lodging (H/M/C/C)

RDS will complete 150 visitor profile surveys per month. On-site face-to-face interviews will be supplemented with Internet-based post-visitation surveys. The research results will be reported, including an executive summary, within 20 days of the close of the month.



Task 1b: Visitor Impact Study: In-Home (V F/R)

RDS will complete 384 internet-based in-home surveys annually. The research results will be reported in conjunction with the Impact of Tourism study in June.

Task 1c: Visitor Impact Study: Regional (Day-Tripper)

RDS will complete 384 internet-based day-tripper surveys annually. The results of the day-tripper research will be reported in June in conjunction with the findings of the Impact of Tourism study.

Task 2: Hotel Occupancy and Average Daily Rate Study

The relevant monthly summary statistics will be provided to the CVB within 20 days of the close of the reporting month. Reports will include an estimate of the total number of visitors and their expenditures, as well as year-to-date summaries. Seasonal and annual summary reports will also be prepared. Tracking comparisons with other destinations will be provided to the extent possible.

Task 3: Impact of Tourism Study

RDS will provide an annual value of tourism report with an executive summary to be delivered in the month of June. Additionally, preliminary value of tourism statistics will be provided at the beginning of March to coincide with Tourism Week.

Task 4: Inquiry Conversion Study

RDS will provide an annual report with an executive summary. The conversion report will be delivered in July to provide input to formulating strategic marketing plans. Additionally, RDS will provide quarterly impact briefs in response to specific advertising and promotional campaigns.

Task 5: Focus Group Research

Focus groups will be conducted on an as needed basis. The typical top line contact report for the session will include an executive summary of the findings and both audio and video recordings of the group. It will be delivered within 7 to 10 working days of completion of the group session(s).



4. Creative Ideas for Collecting Data, Interviewing Techniques, and Reporting Delivery

Although we recommend continuing the basic foundational research program, the world is not static and the destination's markets do not stand still. The current



economic environment mandates doing things differently: better, faster, and cheaper.

Customers today are taking increasing control over their consumer experiences. They are empowered, savvy, and embrace changing technologies. They increasingly rely on what other people say about a product or service in lieu of a company's messages to make decisions and form opinions. Social networking and consumer generated media (CGM), like Facebook, Twitter, and YouTube, etc., offer valuable market information by tapping into consumers' perceptions about the destination. Monitoring these media permits us to go where our clients' audiences are and to communicate with them on their own terms.

RDS has identified these communication trends, is tracking them, and is using them to our clients' benefit. Over the past three years, we have developed and implemented innovative modes of reaching consumers

and integrating findings into strategic recommendations. For example:

- Internet Video Dialogs (IDI's): Because of the global connectivity of the Internet, we can now initiate in-depth, face-to-face, virtual dialogs with consumers (Webview ™). As a result, we are cost effectively organizing focus group-like discussions with people who share similar interests and experiences across geographic borders almost instantaneously. These IDI's are rich in texture and give deep insights into how motivations are translated into action. We have applied this opportunity by developing on-going dialogs with:
 - Leisure visitors
 - Meeting planners
 - Sports and event organizers
 - Industry stakeholders
 - Community leaders

We have successfully used this technique for in-depth promotional concept testing, R.O.I. analysis, and branding strategy input.



Panel Communities: Over the years, RDS's panels have grown in size and now include better than 200,000 qualified traveler contacts (PanelTrac ™). The objective of our panel research is to gauge the effectiveness of promotional strategies and to detail market opportunities.

A specific application of our panel research is to assess impacts of events such as hurricanes, wildfires, economic cycles, transportation disruptions, etc. Through our panels, RDS can act quickly in the wake of an event. We have fielded hurricane impact panels within a day of landfall and a series of oil spill perception panels starting within a week of the disaster.

Mobile (SMS and Online) Research:

The ubiquity of mobile technology and smartphones offers new marketing and research opportunities. A principal reason for using mobile platforms is their convenience to respondents. Mobile phones are user friendly, with text messaging and web capabilities commonplace. Mobile phones offer:



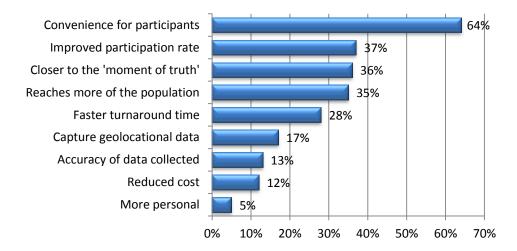
- Access to people and remote locations that are otherwise unreachable;
- Near real-time responses;
- The ability to react quickly to feedback.

Our mobile phone application provides enriched insights, including in-themoment feedback, photographs, and geolocation. A key advantage of using the application is that consumers can provide opinions and attitudes quickly, particularly at the point of experience. Mobile research represents a way to supplement other research and consumer communication channels.

RDS is now applying this new technology. Our mobile research application enables us to spot trends, capture human behavior as it occurs, and build a community of consumers who actively share their experiences in real time from their mobile phones. Consumers share experiences through snippets, a series of Twitter-like photos that are time and location coded. Through this research platform, we can monitor real time experiences and what inspires and motivates travelers. We are using this technique extensively at events, trade shows, etc.



Perceived Benefits of Mobile Research



Social Media/Networking: Social media have caused a fundamental shift in the way people communicate and collaborate.



Similar to mobile applications, social networking sites such as Facebook, LinkedIn, Twitter, and YouTube offer new opportunities to connect with and gather information from vast communities of consumers. The power of social networks gives access to consumers that are not reachable via offline methods. It provides the opportunity to expand the reach of research through the viral nature of social media interactions. For example, Twitter provides opportunities to place an open call to a large group of people to obtain research reactions and input.

We have successfully recruited highly targeted survey participants by placing announcements on Facebook and LinkedIn and we will continue to explore the applications of such vehicles in gathering market intelligence for our clients.



Value of Tourism: Tourism is one of Collier County's most significant industries. Every County resident benefits from visitor activity. Tourism spending creates jobs, enriches payrolls, supports the County's infrastructure, and eases residents' tax burdens. It has financial and fiscal benefits and diversifies the quality of life, lifestyle, and amenities available to residents. Unfortunately, the impacts of tourism are not always visible to the CVB's constituencies.

Consequently, RDS pioneered Value of Tourism reporting to document the real impacts of visitor expenditures on the daily lives of Collier County residents. Our on-going objective is to streamline the message and put the benefits in perspective for CVB audiences. For example:

 We have structured our reporting to include what tourism means each day in terms of jobs, pay checks, tax revenues, and R.O.I.

We have structured our reporting to include what tourism means each day in terms of jobs, pay checks, tax revenues, and R.O.I.

• We have focused our fiscal impact reports to not just address what visitors pay in taxes, but equally what benefits flow back to the County.

© Consumer Motivation/Brand Reflection Research: Part of our on-going dialog with consumers explores brand perceptions and images. We have developed new tools to explore and communicate these perceptions in greater

detail and report them by segments and micro markets, as well as globally. For example:

 We conduct and record Internet-based web dialogs. Our clients can see and hear in real-time what their customers are saying in their own words (video "snippets").



Our face-to-face
 information taking has been computerized, allowing us to record detailed
 open ends and present them in various ways to capture the most prevalent
 images in visitors' minds about the destination:



Consumers say the Naples, Marco Island, Everglades Area is:



- We incorporate promotional images (both print and video) into our face-toface survey process to field test the traction and conversion effects of advertising campaigns.
- © **R.O.I. Analysis:** The detailed economic and demographic information provided by the U.S. Census can be used to telescope target marketing efforts and the assessment of market opportunities. Integrating census statistics permits highly precise impact estimates that quantitatively focus on the R.O.I. of the CVB's efforts.

5. Processes/Procedures for Quality Control and Project Management

Our professional research function is to provide actionable marketing recommendations to our clients. Hence, we are keenly aware that the quality of the research information we provide affects the objectiveness and success of our client's decision-making. Data integrity and quality is RDS's primary concern. To this end, we have established a set of strict quality control procedures to ensure the precision and representativeness of our data and statistics.

The planning and management of this research project is crucial to its success. Our responsibility will be the development of a clear and effective management structure defining what is to be achieved and how it is to be achieved.

The critical common elements to meet the objectives of this project are:

- © Communication;
- Knowledge;
- Skills;

- © Commitment;
- Efficiency;
- Effectiveness.



We will apply an interdisciplinary team approach to manage this research project. Our team is composed of professionals having all the necessary skills, training, and experience to plan and implement the project.

RDS's team, led by Walter J. Klages, Ph.D., will employ the following steps in developing our plan for this project:

- © Develop, design, implement, and evaluate activity plans, schedules, estimates of resource requirements for each component or phase of the project;
- © Review all component plans, identifying inputs and outputs and interrelationships and dependencies;
- © Establish links and consistency checks within and between components;
- Assign responsibilities and project tasks;
- Track project cost against budget estimates;
- © Prepare major milestones and overall schedule;
- © Formalize reference dates, the data collection schedule, and budget and resource requirements;
- © Prepare final research plan;
- © Implement on-going review and revision of schedules and assignments as required.

Monitoring and controlling is the management function of being informed and reacting to any problems to keep the project progressing according to plan. RDS's project team will assure that the resources assigned to the project are available and are used efficiently and effectively. The core team will make certain that survey plans are properly implemented and that any other necessary corrections and adjustments are made. The project manager will issue instructions and assignments and ensure that they are followed, set performance standards, and follow-up with team members regarding completion of tasks and adherence to schedules.

Monitoring is implemented through regular weekly team meetings, discussion, day-to-day contact with project professionals, and through the use of plans and a variety of management information reports. Resource utilization, expenditures, and progress will be tracked and reported. Each team member regularly submits written or verbal reports detailing project progress for their portion of the assignment. Operational data such as response rates, interviewer completion rates, follow-up rates, task completion, production reports, and quality control will be reported and reviewed. Additionally, any unusual findings will be discussed so that critical changes and emerging trends can be communicated to the client expeditiously.

We use Milestones and Microsoft Project software to organize, track, and PERT project schedules and completion.

Correct

Population

& Sampling

Well Trained

Information Takers

Tested

Survey



Definition of the Population/Sample Selection

One of the first and most critical steps in designing a survey is to identify the target

population or universe. The target population consists of all elements whose characteristics or perceptions the survey is intended to represent. The definition of the relevant population is crucial because there may be systematic differences in the responses of members of the population and non-members.

Once the target population is defined, it establishes the universe from which the sampling frame is actually drawn. RDS carefully defines the relevant population and sampling frame for each study. Determination of the size of the sample is based on generally accepted

Quality, statistical procedures.

Quality, Actionable Market Research Findings

Questionnaire Design

Applying 30 years of experience with Florida tourism, we have formulated an extensive body of relevant methodologies and research instruments. Before any survey is implemented, our clients always have the opportunity to review and approve the questionnaire and research design. Once the survey is approved, pretest interviews are conducted to test the questionnaire wording and flow, as well as respondent comprehension and fatigue.

In a pretest, the proposed survey is administered to a small sample (usually between thirty and fifty) of the same type of respondents who would be eligible to participate in the full-scale survey. The interviewers observe the respondents for any difficulties



they may have with the questions and probe for the source of any such difficulties so the questions may be rephrased.

Any problems identified during the pretest interviews are reviewed and, to the extent necessary, questionnaire revisions are undertaken in consultation with our clients. This type of pretest work frequently improves the quality of the survey significantly.



Information Taker Training

A properly defined population or universe, a representative sample, and clear and precise questions can be depended on to produce trustworthy survey results **only** if sound interview procedures are followed by competent interviewers. RDS emphasizes interviewer training for every project.

We recruit our interviewers very carefully. Our surveyors undergo strict and indepth training in proper survey techniques and principles. Surveyors are given extra training that pertains to the requirements of the specific questionnaire they will be administering, including execution of simulated surveys. Care is taken to make sure they have a thorough understanding of the purpose of the project, how to approach respondents, how to take a random sample, and how to complete the survey form. Interviewers additionally receive instruction on when to use probes and what to say.

In the case of telephone surveys, randomly selected interviews are monitored by supervisors. In the case of face-to-face surveys, in-field supervision and re-training is implemented on an on-going basis. A random sample of the completed surveys are verified by re-contacting the respondents. Additionally, the work completed by each individual information taker is compared for response patterns or inconsistencies that merit retraining.

Survey Execution

Quality control measures for the actual fielding of the survey instrument include:

- © The surveyor must strictly follow the structure of the questionnaire.
- © To avoid bias when conducting the survey, the surveyor must not provide any suggestions/subjective explanation or change the phrasing of the questions.
- © The surveyor must promptly report his/her progress and any problems encountered so that their supervisors can provide them with assistance.
- © Surveyors have to submit their information within the designated period. The surveyors are not given their next assignment until the Quality Control department has checked and validated their questionnaires.
- © Routine meetings are held to discuss project progress.
- Our clients are always updated regarding the project's progress.

The project manager has the responsibility of making sure that the project progresses as planned and is responsible for taking action to correct any problems that affect the progress or quality of the project.



Data Processing

The majority of our face-to-face and telephone data is collected via computer-assisted telephone or personal interviewing (CATI or CAPI). The logical skip patterns and parameters of each survey are programmed in to ensure accuracy and completeness. This facilitates the survey process and greatly improves the quality of the data. Since the interviewers record the respondents answers directly into the computer, this process eliminates data entry and the potential errors associated with it.

For those cases where computer-assisted interviewing is not possible, we use scannable survey forms. RDS employs a full page optical mark and optical character (OMR and OCR) scanner and software. Our data processing scanning procedure includes a verification loop where potentially unclear marks or characters are reviewed and corrected as the dataset is created.

Questionnaire Verification

For verification, the Quality Control department checks for completeness, reliability, accuracy, and inconsistencies. Questionnaires with incomplete or inconsistent answers are filtered out. To assess the impact of non-response to a particular question, we analyze the differences between those who answered and those who did not answer. Procedures to address the problem of missing data include re-contacting respondents to obtain missing answers (if possible) and using the respondent's other answers to predict the missing response. The Quality Control department also analyzes and categorizes any open-ended responses. All coding frames are reviewed and approved by project managers. A random sample of coded responses are reviewed and verified.

Report Verification

The results of all key statistical analyses and conclusions drawn from research are reviewed by an RDS analyst **not** directly involved with a given project. As part of our quality assurance service, all reports that are submitted to our clients go through our panels of project managers, experts, and senior consultants. The process includes verification of language, data, and content of the reports to ensure that our clients receive the highest quality.

Client Communication

It is RDS's commitment to keep our clients in the loop every step of the way. From developing survey instruments and focus group protocols to sharing critical industry publications and trends, we proactively inform and collaborate with our clients. All design, sampling, and questionnaire changes and revisions will always be undertaken in consultation with CVB representatives.



We realize the importance of being part of the Collier team and will coordinate closely with CVB staff, marketing vendors, and stakeholders. The firm's principals will be available for consultation and to advise on all matters pertaining to market trends and research. When there is something you need to know, contact us. You can be assured of a prompt response to your question.

The results of all of the research RDS implements on behalf of the CVB will be prepared as written and/or audio-visual presentations of major findings. When appropriate, these reports will include an executive summary with detailed strategic and tactical recommendations. Additionally, a summary of the research methodology, sample composition, and sample sizes will also be included.

RDS typically provides reports as PDF documents for ease of communications, but also offers Microsoft Word, Excel, and PowerPoint files to meet our clients' information needs. We stand ready to mine the database to answer questions, profile micro markets, or to provide greater insight as needed.

6. Project Approach

What has traditionally drawn both leisure and group visitors to the Naples, Marco Island, Everglades area are its award-winning world-class beaches, natural environment, relaxed atmosphere, quality accommodations and dining options, as well as the many cultural and entertainment venues available to guests.

Collier's tourism industry has achieved impressive growth. Yet, for continued growth, Collier must successfully differentiate itself according to the brand that customers hold in their minds. The success of the Naples, Marco Island, Everglades area in growing its share of Florida's tourism is the result of the industry's sustained, proactive, and targeted marketing efforts.

Growth is not guaranteed. Growth is earned.

Collier County is coping with:

- Exogenous events such as the economic uncertainty, potential hurricanes, gas prices, etc.
- Aggressive competition from other beach destinations in Florida and around the world:
- The need for intelligent, forward looking strategic branding to diversify the pursuit of market opportunities and drive future growth;
- Constrained budgets;



- Preservation of its fragile natural resource base -- the mainspring of the area's unique beauty;
- Safeguarding the destination's quality of life -- the lifestyle that attracts visitors;
- On-going changes in the demographics of its visitor segments.

Clearly, it is critical for the destination to have a clear assessment of:

- Who their market is;
- © Where their audience is located;
- What their customers are thinking;
- What messages and information are needed to stimulate an interest in visiting the area.

Destinations' efforts are also impacted by the on-going revolution in how people communicate and get information and Collier is as the forefront of the shift from traditional communication vehicles to new media channels. Across socio-economic boundaries, Web 2.0 has connected what used to be spatially isolated groups into markets of common interests, preferences, and motivations. It has created global word-of-mouth effects that are viral and nearly instantaneous. People now interact with markets in new ways that reinforce and strengthen brand perceptions.



Traditional modes of marketing geographically are yielding to a growing emphasis on targeting special interest micro markets. New and interactive communication channels allow for highly targeted promotion of destination attributes to diverse sets of consumers, each drawn by specific benefits.

From a research perspective, it is critical to identify special interest markets, determine their size and potential economic benefit (R.O.I.), as well as exploit commonalities that link consumers' motivational interests with destination attributes.

In today's competitive environment, destinations must leverage their branding to heighten awareness, support perceptions of quality, establish emotional links with their customers, and differentiate themselves from their competitors. To be

successful, these efforts must be guided and tracked by clear, effective, and actionable research. The destination can then fashion messages that optimally communicate, inform, enhance, and transform latent into effective demand.

The destination can then fashion messages that optimally communicate, inform, enhance, and transform latent into effective demand.



The CVB and the TDC are seeking a market research provider with extensive experience in the development and implementation of integrated destination market research. As market realities change, RDS will continue to calibrate Collier's research program, focusing on the current needs and challenges of the County's tourism industry. RDS is recommending the following core research program for Collier County:

Task #	Task Description	Number of Surveys	Methodology	Page
1a	Visitor Profile Study Commercial Lodging (H/M/C/C)	150/month	In person, face-to-face and post visitation surveys	21
1b	In-Home (V F/R)	384/year	Internet with telephone control group	29
1c	Regional (Day-Tripper)	384/year	Internet with telephone control group	30
2	Hotel Occupancy and Average Daily Rate Study	80/month	Internet/email, fax, telephone, and/or in-person	31
3	Impact of Tourism Study	Not a separate survey task	Part of visitor profile and occupancy research	33
4	Inquiry Conversion Study	384/biannually	Internet with telephone control group	36
5	Focus Group Research	8 – 10 respondents/ group	Internet and telephone	38

Please see **Tab II**, **Section 7**: **Detailed Scope of Work**, **Pages 21 - 39** in this proposal for specific details of RDS's methodological approach to each project task.



7. Detailed Scope of Work

Task 1a: Visitor Profile Study: Commercial Lodging (H/M/C/C)

The Commercial Lodging Visitor Profile study that we are proposing will be undertaken as a multistage stratified random sample in-person survey with overnight visitors. The need to apply multistage sampling for this study is based on

the fact that different segments of Collier's lodging plant have their own unique characteristics and visitor attractors. These segments or clusters must therefore be represented in both the sample and the Countywide profile information relative to their weights in the total population of lodgings.

For this study, our sampling procedure involves, on the first level, a segmentation of the inventory of lodging properties located in specific



geographic areas of the County. For this project, we propose three broad geographic segmentations: Naples, Marco Island, and the Everglades.

The sample will further be stratified in proportion to:

- © The incidence of the type of establishments (i.e., hotel, motel, condominium, vacation rental, bed and breakfast, campground, etc.);
- © The size of the lodging facility (number of units in the rental pool);
- © Classification of establishment (resort, beachside, urban, etc.).

The purpose of this stratified sampling process is to ascertain that each industry segment is represented by an appropriate and valid sample size in order to analyze it both separately and as a part of the relevant working population. The working

population must be representative of the general population, that is, the universe of Collier County visitors to which the study's findings can be generalized. Under no circumstances can **QUOTA** sampling be applied to this study because it would destroy the representativeness and projectability of the research effort which requires **RANDOM** sampling.

Our sampling frame is developed based on Collier County's inventory listing of lodging





facilities that house visitors and collect resort taxes. Structured around a core of "key driver" properties mandated by their size and significance to the Collier's tourism industry, the survey access points for this study are dynamic and drawn randomly from this inventory list on a monthly basis. This approach is critical because the flow of visitors changes in response to seasonality, special events, changes in inventory, etc.

In our experience, to provide monthly profile statistics for Collier tourism, representative of all specified visitor segments, mandates a multistage stratified random sample of approximately 150 completed visitor surveys per month. Surveying will be undertaken at licensed commercial lodging establishments, attractions and events, public beaches, parks, piers, trolley stops, and the Southwest

Florida International Airport (RSW). At the point of survey, a random selection procedure is used to identify the visitors to be interviewed.

We recommend continuing this research task with face-to-face in-person interviews as the backbone of our visitor profile data collection. In our Respondents must not have previously been interviewed in Collier County and only one interview can be taken from any given visitor party.

professional opinion, face-to-face interviews are the most reliable method of data collection for this part of the research effort where exploring attitudes and motivations are of primary concern.

Some of the main advantages of this method are:

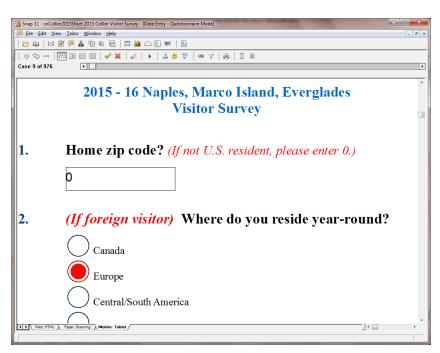
- Cartain groups such as meeting or business travelers are difficult to reach by any other method while maintaining the randomness of the survey process.



- © **Comprehensiveness** Information takers can probe for more detail.
- **Behavior Monitoring** Respondent behavior can be observed during the survey process.
- **© Supervision** − In-person interviews also provide opportunities for direct supervision of the information takers.
- Interaction Between Interviewer and Respondent Interviewers can also explain detailed instructions to the respondent.
- © Opportunity to Test Promotional Content (Web, Print, and Video) Interviewers can expose respondents to advertising materials in the course of the interview, offering a unique opportunity to obtain real-time consumer input.

To maximize the efficiency and cost effectiveness of data collection, survey responses will be recorded on handheld tablet computers. The computerized questionnaire facilitates rapid revisions to the survey instrument as new issues arise. It provides monitoring opportunities and greatly enhances the speed-to-market of our findings.







Face-to-face interviewing provides a real-time snapshot of visitors' experiences during their trip. To further debrief visitors on the full range of their experiences, the face-to-face profile research will be supplemented by post visitation Web surveys. The Internet research will:

- Enhance the density plot of visitor ZIP codes to further define Collier's markets;
- © Expand the coverage of profile surveys, facilitate micro market definition, and reduce the cost of data gathering;
- Afford the opportunity to follow up with business, meeting, and event travelers who might otherwise be too busy to complete the survey in-person in the destination;
- Validate the face-to-face survey information;
- © Provide important after-visit expenditure and budget information;
- © Provide a further gauge of visitors' experiences, their satisfaction with the destination, and impressions of how well it fulfilled their expectations.

Internet surveying will be implemented by relying on an external database generated from visitors' emails.

The design and sample stratification of our study will deliver detailed, precise, valid, and statistically representative data for Collier's tourism industry. The sample's parameters assure inclusion and coverage for all geographic areas of the County, different types and sizes of accommodations, as well as a valid cross-section of visitors to the area.

Our proposed monthly sample of 150 surveys ensures valid representation of the Naples, Marco Island, Everglades area's principal macro and micro visitor markets in the database. A sample of this size provides the strategic leverage necessary to permit sub-tabulations profiling selected visitor subsets and special interest micro markets on a seasonal and annual basis. In practice, at the professionally recommended confidence level of 95%, the precision and validity of the profile's statistical estimates is assured. To ensure the representativeness of the Visitor Profile data, surveying must be undertaken year-round across different day, week, and month parts.

The administration of a typical survey involves approximately 5 - 10 minutes and addresses the following key concepts. Using same period/previous year comparisons, our monthly, seasonal (high, low, and shoulder), and annual reports and presentations will detail, among other variables:

© The number of visitors staying in commercial lodgings, the related direct expenditures and economic impact, lodging occupancy, average daily rates (ADR), and revenue per available room (RevPAR);



- Visitor origin numerosity by region,
- © Transportation modes including airports of deplanement;
- Motivations and purpose of trip, including leisure, individual business, and meeting/conference travel;
- © Incidence of first time visitation;
- Competing Florida destinations considered;
- Information used in planning visits to Collier;
- © Reliance on and usage of the Internet for travel information and/or booking including use of Collier's website. We will also include URL's used to get information and to book travel. Additionally, we will query about respondents' involvement with social media/networking sites and smartphone use;
- © Length of stay, party size, and party composition;
- Satisfaction with trip, word-of-mouth recommendation, and likelihood of repeat visit;
- Activities enjoyed in the area, including the Everglades, water tourism, culture, sporting events, etc.;
- Average age, age distribution, household income, and occupation categories;
- Party budgets by major expenditure categories, including prepaid expenses. The proposed approach provides more accurate and complete estimates of spending because expenditures are itemized within major budget categories to aid respondent recall. Budgets will be further validated by post visitation responses;
- Exposure to the area's promotional messages and their impact on destination visitation;

Everglades area;

- Influential motivators that attract visitors to the Naples, Marco Island,
- Primary international origin markets of interest;

SNAPSHOT

The Commercial Lodging Visitor Profile Research is designed to:

- Expand grainage of Internet data:
- Provide routine data reports for special tourism micro markets;
- Utilize a computerized inperson survey process that provides added flexibility and "speed-to-market";
- Include executive summaries, methodological statements, details of sample composition, and sample sizes for all reports.



- Visitor generated input reflecting the destination's brand image (open ended destination attributes);
- Tourism industry employment statistics within Collier County;
- C Third party reports for economic trends, competitive destination information, and group/meeting impacts.

We will query about respondents' involvement with social media/networking sites and smartphone use.

Preliminary monthly Visitor Profile reports will be issued by the 20th of the following month and the key results of the on-going Visitor Profile research will be reported on a monthly basis at scheduled TDC meetings. These reports will be prepared as both written and audio-visual presentations of major findings and will include an executive summary with detailed strategic and tactical recommendations. A summary of the research methodology, sample composition, and sample sizes will also be included.

Additionally, key market variable profiles (i.e., fly vs. drive, first time vs. repeat, Floridian vs. Out-of-State, United Kingdom, Continental European, Canadian, Latin America, etc.) can also be prepared.

Given that the Naples, Marco Island, Everglades area must promote and communicate toward dynamically changing markets, point-of-origin and consumer motivation data are of prime importance to the successful targeting of Collier tourism. They define the geographic markets and consumer segments from which the destination draws its domestic and international leisure, business, conference, and convention visitors.

Identifying market opportunities for concentrated targeting efforts requires a visitor segmentation program that precisely defines the origins of visitors and potential visitors. On the first level, the visitation origin study will be developed from the Visitor Profile survey dataset. The profile information provides data on ZIP codes, cities, MSA's, states, and home regions of U.S. visitors. For foreign visitors (Canada, Europe, and Latin America), the origin data are collected by city, country, and airport of enplanement.

The utility of the visitor origin study will be further augmented by correlating the profile data with the ZIP code information derived from CVB inquiries. **This allows the monitoring of the impact of promotional and advertising programs in key markets.** Visitor origin data provided by property managers in the Occupancy survey will also be analyzed.

Importantly, RDS's Visitation Trend analysis will also focus on the changing special interests, needs, and motivations that drive visitors to the destination. The Internet has and is empowering consumers. Social networking and consumer generated media are arguably one of the fastest growing modes of communication and their



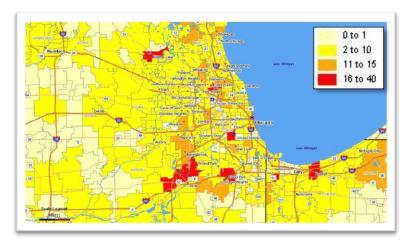
popularity is permitting individual consumers to interact with and influence other stakeholders. Consumers are increasingly inclined to seek out others like themselves, creating new markets and market opportunities. The challenge is to combine in-depth knowledge of peoples' aspirations, wants, desires, and shared experiences with rigorous quantification of opportunities to maximize the destination's penetration of markets.

The demographic fabric of the U.S. population dramatically changed when Baby Boomers emerged as a primary travel market segment. Today, the next generation, Millennials, are coming to the forefront. Hence, the parameters, motivations, wants, and needs that drive their visitation are changing.

RDS's forward-looking strategic thinking will focus on dynamic changes in the destination's visitor segmentation. We will analyze and report on emergent markets like minority travelers and developing international targets including South and Central America, etc.

The documented percentages of visitors traveling to the Naples, Marco Island, Everglades area by regions, key MSA's, and emerging motivational interest market niches are used to estimate the total number of visitors attracted from these segments. We will initiate time series analysis of this data to isolate trends that highlight emerging markets and markets with significant potential for the destination.

Collier's visitor origins, by regions as well as by major MSA's, states, foreign countries, and documentable trends in consumer interests and motivations will be reported on a monthly, seasonal, and annual basis in tandem with the Visitor Profile reports. Additionally,



data will be mapped to show significant geographic origin clusters and nesting. RDS will also take the defined geographic and motivational segments and leverage them with expenditure data to document the economic impact of these groups.

The utility of the Visitor Trend Research can be increased by correlating visitor origin clusters with cutting-edge demographic and socio-economic U.S. Census data and other secondary data sources to gain further insight into market potential and to isolate the micro cluster opportunity markets that promise the highest return on investment for the CVB. This will identify markets of opportunity, facilitate the development of a dynamic visitor targeting strategy, and permit analysis of the draw



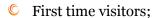
competitive destinations have on the area's existing customer base. Additionally, RDS will validate our databases against normative data, such as Visit Florida's Visa database, to identify opportunity gaps.

Every effort has been made in our response to this RFP to suggest strategies to expand the impact of each research study while allowing for the most effective measurement and data collection possible within the available budget and to maximize the usage of data across various studies.

The Commercial Lodging Visitor Profile is the most labor intensive part of the research program. Our innovative application of computer-assisted interviewing has controlled the cost of data collection and processing for this research task. Computer applications accelerate our speed-to-market in order to provide this information to decision makers more quickly and efficiently. The flexibility of our interviewing process allows us to repurpose this study on demand to address specific research problems or needs as they arise (such as the oil spill, gas prices, storms, etc.)

The most significant repurposing of the Commercial Lodging Visitor Profile Research lies in our ability to use the database to drill deeper into the motivational equity set

that drives specific visitor groups to the destination. Data mining is the background against which specific marketing initiatives can be undertaken by the CVB. Analytical examples include:



- Explorers who visit multiple destinations on their trip;
- Visitors enjoying the area's culture;
- © Eco and nature tourists, kayakers, bird watchers, etc.;
- © People in the area for a special occasion/event (i.e., weddings, reunions, etc.);
- Visitors by transportation modes;
- Attractions users;
- Visitors traveling with (or without) children;
- © Floridian, Canadian, United Kingdom, Central European, or Latin American visitors;
- © Business travelers;
- © Convention/conference/meeting delegates;
- ♥ Visitors attracted to the area by sporting events/facilities;
- © Internet users, people who have used the CVB website, online bookers, etc.





For 2016, we will flexibly adapt our information gathering procedures. We will expand the use of mobile technologies, social networking, and the Internet to improve our access to visitors and potential visitors, accelerate the speed of data collection, effect greater cost efficiencies, and leverage the utility of our research for our clients.

Task 1b: Visitor Impact Study: In-Home (V F/R)

In-Home visitors have significant economic and fiscal impact on the County. Through their expenditures, they contribute to County ad valorem tax revenues. Moreover, In-Home visitors are frequently in the County for the first time and have a high likelihood to return. Their experiences in the destination are also an important source of word-of-mouth recommendations further accelerating visitation to the destination. Description and quantification of this visitor segment is an important element of describing Collier tourism and a leading indicator of future visitation.

The In-Home Visitor Profile will be developed by means of a systematic random sample Internet survey of Collier County households, with a telephone-based control group. Some 384 households will be contacted annually to determine what proportion lodge vacationing visitors.

We maintain an up-to-date listing of Collier County email addresses from a highly reputable national sampling company. This sampling procedure provides the most current, inclusive universe of Collier County households available. The systematic sampling methodology ensures that participating households are not resurveyed. At the 95% level of confidence, a sample of 384 surveys will yield survey results with a standard error not exceeding $\pm 5\%$.

The In-Home inquires about the presence of out-of-town visitors in the home during the month, their origin, party size, length of stay, modes of transportation, and related information.

The incidence of households with visitors and the average visitors per household from this survey will be correlated with U.S. Census statistics for Collier County to generate an estimate of the number of people staying with friends and relatives each quarter.

The results of the In-Home (V F/R) research will be reported in tandem with the Commercial Lodging Visitor Profile data as part of the annual Value of Tourism report.

Our reports and presentations will detail:

- © The number of visitors staying with friends and relatives in Collier County;
- Estimated expenditures;
- In-Home visitor's economic impact on Collier County.



Task 1c: Visitor Impact Study: Regional (Day-Tripper)

Throughout a typical year,
Collier County attracts visitors
from a regional area within an
approximately 50 mile radius of
the destination. Such visitors
are referred to as "day-trippers."
By definition, day-trippers do
not spend the night in Collier
County. However, day-trippers
do use County assets such as
public transportation, parks,
parking facilities, beaches,
causeways, piers, restaurants,



retail facilities, entertainment venues, etc. Thus, the Day-Tripper Visitor Profile research is an integral part of the overall quantification of the different visitor segments that make up Collier County tourism.

To capture and quantify the numerosity and related value-added of this visitor segment requires an annual Internet-based study conducted with a random cross-section of regional households (sample size 384), with a telephone-based control group. We will obtain a random sample of email addresses of non-Collier residents located within the ZIP codes defined by a 50 mile radius of the County from a highly reputable national sampling company.

This sampling procedure provides the most up-to-date, inclusive universe of households likely to generate day-trips and assures the validity and representativeness of this data. We will also consult variations in traffic counts at major arterial ingress and egress routes to correlate against our estimates. At the 95% level of confidence, a sample of 384 surveys will yield survey results with a standard error not exceeding $\pm 5\%$.

The survey topics focus on the incidence, frequency, and purpose of day-trips to Collier County. The survey instrument is also designed to elicit information about expenditure patterns and party sizes.

The results of the Day-Tripper Research will be reported with the annual Value of Tourism findings. Our report will detail day-trippers':

- © Numerosity;
- Estimated expenditures;
- © Economic impact.



Task 2: Hotel Occupancy and Average Daily Rate Study

In the lodging industry, the number of rooms rented is measured as a percentage of the number of rooms available. This ratio is known as the occupancy rate. The average price paid to rent a guest room is defined as the Average Daily Rate (ADR). The amount of room revenue is driven by the number of rooms rented and the price paid to rent each room.

These occupancy statistics are a measure of the rate at which the industry's lodging plant is utilized. Occupancy data give critical input to the calculation of revenue per available room (RevPAR), the number of visitors staying in the County and their expenditures, as well as providing on-going tracking of the health of the industry.

Different segments of Collier's lodging plant have their own unique characteristics and visitor attractors. These clusters must, therefore, be represented in both the sample and the Countywide occupancy information relative to their weights in the total population of lodgings. Our Occupancy sampling tracks changes in the number of rental accommodations (i.e., hotels, motels, condominium units, timeshare rentals, property management companies, R.V. parks, guest houses, private home rentals, bed and breakfast properties, etc.) subject to resort tax legislation and reflects the destination's most current accommodation listings.

RDS's sample will be stratified in proportion to:

- © Geographic areas of the County;
- © The incidence of the type of establishments (i.e., hotel, motel, condominium, vacation rentals, bed and breakfast, campground, etc.);
- © The size of the lodging facility (number of units in rental pool);
- © Classification of establishment;
- © The incidence of independent and chain properties.

The primary purpose for this stratified sampling procedure is to make certain that each segment is represented by an appropriate sample size in order to analyze it both separately and as a part of the relevant working population.

To implement Collier's occupancy research, we will contact a stratified random sample of at least 80 properties each month. To generate the desired occupancy information in a representative, timely, and cost efficient manner, we will implement a combination Internet/email, fax, telephone, and/or in-person survey mode for this project. The survey instrument will be designed and programmed so that all interview platforms yield congruent information. The survey instrument and any changes thereto will be provided to the CVB for review and input.

We will contact each property manager to determine their preferred method of responding to our occupancy survey. At the beginning of the month, an email



containing a link to the survey instrument is sent to each property who has expressed a preference to complete the survey online. Non-responding properties are recontacted both by email and telephone up to four times. A blast fax with the occupancy form attached is sent to fax properties, with follow-up faxes and phone

calls as needed. Telephone properties are contacted beginning in the first week of the month and properties that do not provide a response on first contact are recalled up to four times.

Critical to obtaining accurate and reliable occupancy data is our commitment to maintaining the strictest confidentiality for this sensitive data bank. No property's occupancy information is retained on our website or is ever accessible to anyone else. All data received from the Internet are confirmed against our database to ensure

SNAPSHOT

The Occupancy Research is expanded to:

- © Capture sporting, special event, meeting room nights on an as needed basis;
- © Correlate with Smith Travel Research (STR) competitive set data.

validity. Secondary occupancy information such as Smith Travel Research (STR) will also be consulted to complement RDS's primary occupancy statistics.

RDS's industry confidence barometer of leading indicators for Collier tourism has proven very efficient in predicting industry trends. We will retain the barometer as a leading indicator to support our on-going tourism forecasting efforts.

The survey takes an average of five minutes and includes such key parameters as:

- C Location of property;
- © Property type;
- C The property's total number of lodging units and number of units in the rental pool for the current research month;
- © Average occupancy and ADR for the prior month, as well as current occupancy trending;
- O Average party size and guests per room;
- © Distribution of guests by geographic origin and purpose of trip (i.e., business, meeting/group, leisure, etc.);
- © Current levels of reservations and three month forward business level expectations.

Both the Occupancy and the Industry Barometer are reported on a monthly, seasonal (high, low, and shoulder), and annual basis. The findings of this research are included with the Visitor Profile as an integral part of our monthly briefs and



presentations. Using same period/previous year comparisons, our reports and presentations detail:

- © Occupancy;
- Average Daily Rate (ADR);
- © Revenue Per Available Unit (RevPAR);
- © Forward-looking management barometer.

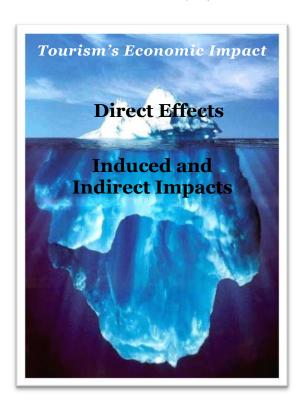
To stretch the efficiency and effectiveness of our Occupancy studies, special questions can be added to the research effort on an as needed basis to capture the room night impact of sporting or special events or natural crises.

We will also undertake normative comparisons with other tourism destinations to provide strategic positioning information. This competitive data will be augmented by Internet-based rate research.

Task 3: Impact of Tourism Study

Analysis of the Value of Tourism to Collier County

The purpose of the proposed Value of Tourism Study is to develop an up-to-date assessment of the impact of tourism on the economy of Collier County. The Value of Tourism analysis will tie together data from our Visitor Profile (Commercial Lodging, In-Home/V F/R, and Day-Tripper), Occupancy Research, and salient secondary information (i.e., sales tax collections, resort tax collections, NAICS data on



employment and wages, etc.) -- all elements that are critical to understanding the full impact of tourism on Collier County.

The algorithm and models developed by RDS involve primary data from the Occupancy survey and Visitor Profile survey in terms of inventory utilization, party size, length of stay, budgets, etc. The Value of Tourism reporting also includes secondary data inputs from Visit FLORIDA; the Florida Agency for Workforce Innovation, Office of Workforce Information Services, Labor Market Statistics; the Florida Department of Revenue, Office of Research and Analysis; and the Collier County Tax Collector's Office. The Value of Tourism does not represent an additional survey effort.

Clearly, the tourists' initial direct expenditures have stimulative effects on economic activity in the County. This spending not only accelerates personal



income, employment, and government revenue in the community, but also increases economic activity in existing businesses and supports new business formations. Integral to this analysis is the "multiplier" concept. This economic concept is based on the knowledge of established interdependencies between different sectors of an economic entity. Visitor expenditures affect not only the organizations at which the initial expenditures are made, but also those businesses' suppliers and the suppliers' suppliers and so on. The subsequent rounds of economic activity that reflect spending by local inter-industry purchases and local government revenues are referred to as indirect impacts. The proportion of new household income that is "respent" locally on goods and services is termed an induced impact. Both the indirect and induced effects account for leakages of money from the local economy in each round of spending. Our study, therefore, takes into account direct, indirect, and induced economic impacts and analyzes dynamic, as well as static data related to this project.

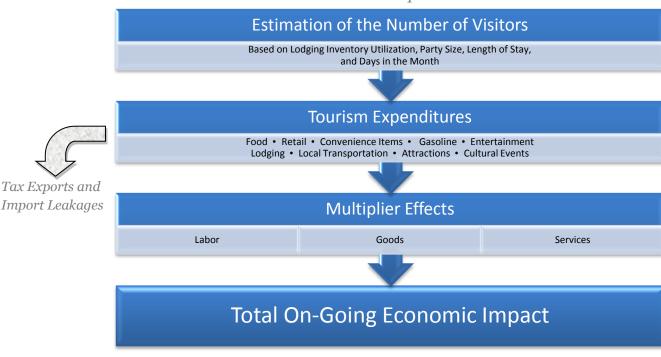
Multipliers are derived through software and structural matrices purchased from IMPLAN, which is recognized as the most authoritative source of this data. IMPLAN was developed as a cost effective means of producing local input-output models.

IMPLAN calculates four commonly used measures of economic impact:

- Sales;
- Personal income;

- Value-added;
- Employment.

RDS's Economic Impact Flow Model





We will prepare an annual in-depth Value of Tourism statement based on multiple data inputs that will estimate and detail:

- © The seasonal and annual volume of overnight visitors to the Naples, Marco Island, Everglades area by geographic origin, nationality, transportation mode, and visit motivation;
- © The budget of the typical visitor party by key demographic variables, including spending at hotels, restaurants, shopping, attractions, and gas stations;
- © The proportion of taxable retail sales generated by visitors;
- © The sales tax, gasoline tax, and local option taxes contributed by visitors and the related savings to Collier County residents;
- © Additional employment generated by tourism in the Naples, Marco Island, Everglades area by sector of the economy and tourism related wages;
- Visitor expenditures by sectors of the economy (i.e., restaurants, hotels/motels, etc.).

Day-trippers and visitors staying with friends or relatives will also be profiled in this report. This document will focus on the economic impact of these market segments, as well as their numerosity and expenditures.

The Value of Tourism report will be presented to the CVB and selected public and private agencies as a written and audio-visual presentation. Reporting will be based on cumulative seasonal update reports with an annual recap provided, when state and national tourism statistics become available.

The Value of Tourism analysis represents the integration of all of our market research efforts into a statement of the impact of tourism on Collier County's economy. This report combines the cumulative visitation and economic impact data for the calendar year with estimates of retail sales, tax revenues, employment, and wages generated. As such, it represents a full year's

worth of data gathering and analysis.

Because of lagged data availability from the State, this report is typically finalized in June. RDS will also provide preliminary value of tourism statistics by the beginning of March for Tourism Week.

The Value of Tourism is an indispensable component of the research program. Measurement of the economic benefits assists CVB's, destination marketers, planners, and others with an interest in visitor activities to reach a variety of objectives:

SNAPSHOT

The Value of Tourism is designed to:

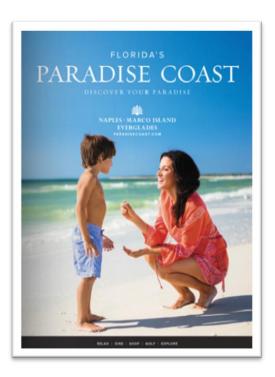
- © Include a fiscal impact analysis as well as a statement of the benefits of tourism to Collier;
- Allocate benefits to a typical Collier County resident.



- © It informs public officials and business decision makers about the benefits of investments in tourism promotion and the assets that support it.
- © It assists the CVB in evaluating the effectiveness of their promotional programs.
- © It educates people employed in tourism about their role in economic and business development and how their productivity contributes to the economic health of their community.
- © By quantifying the returns to promotional and infrastructure investment, it encourages both private and public businesses and organizations to seek out partnerships that hold mutual benefit.
- © By demonstrating tourism's value to the general public, it gives citizens a basis to rationally support tourism marketing and development.

We will design our report in such a way that the information is flexible and can be positioned to make it possible to allocate the benefits of tourism to a typical Collier County resident.

Task 4. Inquiry Conversion Study



The destination and the CVB presently fulfill information requests received via the Internet, toll-free 800 numbers, and a variety of other media, to induce interest and potential visitation to the destination. We propose an Inquiry Conversion Study to describe the characteristics and preferences of persons who contact the CVB seeking information about the Naples, Marco Island, Everglades area. Researching related conversion rates provides an opportunity to gauge and document the impact of CVB advertising and promotional efforts.

Our working population for the Naples, Marco Island, Everglades CVB's Conversion Study will be developed by means of stratified random samples selected from the inquiry response lists provided by the CVB. The study

will be developed by stratifying response segments proportionate to the source of inquiry. Surveys will be conducted using email and telephone, if needed. One of the major advantages of using Internet surveying for the conversion research is the cost effective reach of this communication vehicle, nationally and internationally. We will complete at least 384 surveys for this research on a biannual basis.



We will choose a random sample from the inquiry listing provided by the CVB for this purpose and will phone match a random sample of those inquiries that lack email or telephone contact information. The resulting listing of inquiries will thus be inclusive of all inquiry segments. Stratifying the random sample in proportion to the weight of the various inquiry sources will ensure that the resulting sample is representative of the universe of inquiries. Up to four re-contact attempts will be executed with non-responding households. At the 95% level of confidence, a sample of 384 surveys will yield survey results with a standard error not exceeding ±5%.

The primary purpose of the conversion research we are proposing is to assess:

- 6 How and why visitors decide on their visitation targets;
- © Consumer motivations involved in seeking destination information and making an inquiry relative to household travel planning;
- The proportion of inquiring consumers familiar with the Naples, Marco Island, Everglades area;
- © The brand perceptions and location identification current among travel parties who seek information from the CVB;
- © The proportion of information seekers with prior Collier visitation experience;
- © The proportion of inquiring parties with firm Naples, Marco Island, Everglades area reservation commitments prior to inquiry;
- The proportion of inquirers who at the time of the survey had already completed the planned trip to Collier, their motivations, levels of satisfaction, and planning decisions;
- © The proportion of inquirers who are still planning to take their trip to Collier at the time of survey contact, their motivations and planning decisions;
- © The proportion of consumers who did not take a trip to Collier, but visited competing destinations, their motivations, experiences, and planning horizons;
- The proportion of people who did not take a trip and are not currently planning to travel;
- The role and effectiveness of advertising in directing travelers to the Naples, Marco Island, Everglades area;
- © Details of other social networking and consumer generated media sources consulted (i.e., Facebook, Twitter, blogs, TripAdvisor, discussion boards, YouTube, etc.);
- © A profile of competing destinations defined by inquiry respondents, identifying those factors that differentiate these places from the Naples, Marco Island, Everglades area as a destination.



Looking at the actual amount spent on advertising and promotion, the total number of inquiries from all sources, conversion rates, and visitor expenditures allows us to calculate a first round R.O.I. to the destination and to determine which strategies and tactics offer the highest profit efficiencies.

The Conversion Study will be reported within 45 days of survey completion, both as a written and audio-visual presentation. The report will include an executive summary, methodological statement, our conclusions and recommendations, and detailed tabulations of the study results. Additionally, RDS will provide update impact briefs geared to specific advertising and promotional campaigns.

Task 5: Focus Group Research

The destination's key domestic and international markets are undergoing significant political, economic, demographic, and financial changes. It is our recommendation, the Naples, Marco Island, Everglades area should consider the funding of a series of focus groups, in-depth interviews (IDI's), triads, or round table discussions in the destination's core domestic markets. Focus groups are an environment in which exploratory research is used to exploit group dynamics and personal interaction to obtain creative input and explore key motivations at work among consumers.

The destination's website is playing an increasingly important role the in destination's promotional communications. Website visiting is a two way interaction. Consumers visit your site for a reason. Capitalizing on this opportunity is all about getting the right message to the consumer, at the right time, and in the right manner.

To consumers, a company's website is an extension of itself -- a touch point. When users of a site bounce off the site because of a frustrating experience, research shows they won't go back. They are lost market potential.

The qualitative research we are proposing will provide the strategic intelligence to ensure that the CVB's website and other promotional messaging is "consumer-centric," that is, directly connected to consumers' needs and the brand perceptions they hold.

Markets targeted for qualitative research will be determined in consultation with CVB staff. To this end, we will prepare an appropriate discussion agenda to direct the interaction of group participants. The agenda offers a logical frame of reference in terms of which the most relevant issues, actionable attributes, and consumer preferences articulated by the group, are explored.

Focus group research allows the destination to:

Rate latent consumer motivations and attractability factors that prompt visitation among core markets.



- Obtain a measure of images and preferences for the Naples, Marco Island, Everglades area as a destination, vis à vis the destination's primary competitors.
- © Quantify the visitation generation effect of area attractions and events.
- © Determine how well advertising and promotional materials "sell" and persuade consumers to visit the destination.
- © Test and rate the effectiveness of new creative concepts and positioning platforms.
- © Explore the effectiveness of the destination's brand identity among its core visitor markets.
- © Test consumers' reactions to websites, their messages and usability.
- Assess awareness of the area as a potential venue for group and meeting business in the meeting planner community.

RDS will implement four (4) domestic or international focus groups each year as part of the research contract. The summary reports for these groups will include an executive summary of the findings and detailed tabulations of the results of the sessions.



III. Cost of Services to the County

IN THIS SECTION:

- Research Budget: Annual Pricing Model
 - Core Services
 - Out of Pocket Fees
 - Fee Schedule for Billing Special Projects



Tab III: Cost of Services to the County

Research Budget: Annual Pricing Model

a. Core Services

RDS's firm annual fixed fee budget for the research tasks we have proposed in this RFP is as follows (*Please see Tab II*, Section 7: Detailed Scope of Work, Pages 21-39 in this proposal for detailed rationale for the inclusion of each task):

Task	Description	UOM	Quantity	Unit Price	Total Price
1a	Visitor Profile Study: Commercial Lodging (H/M/C/C)	Monthly	12	\$4,150.00	\$49,800.00
1b	Visitor Impact Study: In-Home (V F/R)	Annual	1	N/C	N/C
1 c	Visitor Impact Study: Regional (Day-Tripper)	Annual	1	N/C	N/C
2	Hotel Occupancy and Average Daily Rate Study	Monthly	12	\$1,250.00	\$15,000.00
3	Impact of Tourism Study	Monthly	12	\$1,000.00	\$12,000.00
4	Inquiry Conversion Study	Monthly	12	\$1,500.00	\$18,000.00
5	Focus Group Research (Up to Four Groups Per Year)	Each	4	\$6,500.00	\$26,000.00
	Yearly Price				\$120,800.00

Significantly, RDS's core budget for TDC Research Services includes (at no charge):

- An annual in-home (V F/R) impact study;
- An annual regional (day-tripper) impact study;
- © Quarterly Destination Marketing Measurement Reporting.

The above specified budgets include all costs for developing, editing, pre-testing, validating, and encoding surveys, computer data entry, data verification, programming, cross-tabulations, statistical significance testing, data analysis, and preparation of written reports corresponding to each study. No charges will be made for travel to and from Collier County.



b. Out of Pocket Fees

Any additional costs such as focus group facility charges, participant honoraria, focus group travel expenses, etc. will be passed on to the CVB at cost, without markup. The maximum projected out-of-pocket expenses is estimated to be \$6,000.00.

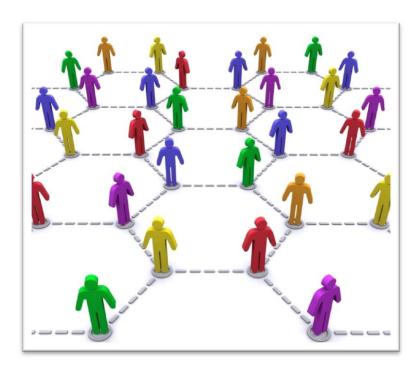
Description	UOM	Rate
Out of Pocket Fees (Maximum)	Monthly	\$500.00

c. Fee Schedule for Billing Special Projects

Pricing for any additional work requested by the Bureau outside of the scope of the core services research program will be provided as a quote in writing prior to the commencement of work on the special project or study.

RDS's corporate blended billing rate for additional services outside of the scope of the contract requested by the TDC or the CVB is **\$150.00** per hour. All invoices for special projects will be based on the real time records of our professionals involved in the study.

Description	UOM	Rate
Hourly Rate for Special Projects	Hourly	\$150.00





IV. Experience and Capacity of Firm

IN THIS SECTION:

- RDS's Unique Qualifications
- Skills, Abilities, Expertise, and Availability of Staff
 Assigned to Study
 - Project Team
 - Subcontractors
- RDS's Technical Capacities to Meet Scope of Services
- Financial Strength and Sufficient Credit
- Tourism, Travel, and Hospitality Projects
- Other Clients



Tab IV: Experience and Capacity of Firm

1. RDS's Unique Qualifications

RDS is uniquely qualified to be the market research vendor for the Naples, Marco Island, Everglades CVB because:

We have a passion for destination research. Research Data Services provides strategic direction, tracks performance, and forecasts the growth of tourism in key U.S. vacation destinations. We have worked with over 19 DMO's. Tourism is at the heart of our business.

You have to be the first to know. We are ready. In the wake of oil spills, hurricanes, and wildfires, we provide proactive, real-time, on-going gauges of impact to our clients. In an emergency or crisis, we are there.

We know the history. Over thirty years of experience with tourism and hospitality research have given our professionals unmatched understanding and insight into the challenges and opportunities of Collier's industry. Continuity and consistency of tracking data is a very significant strength that we uniquely offer.

We have "future vision". Yesterday's trends do not always predict tomorrow's performance. Consumer behavior and markets can change in the blink of an eye. We successfully use our tracking data to identify, explore, and alert our clients to the impacts of changing technologies, lifestyles, and modes of thinking. As early as 2006, we gave our clients early warning of the developing recession and its global characteristics. We anticipate what is useful and has benefits for the industry's evolving challenges.

We know Florida. RDS has implemented hundreds of research studies (contractual and pro-bono) for Florida tourism organizations, public and private, including accommodations, attractions, airports, special events, sports franchises, parks, and restaurants, as well as tourism destinations.

We are in touch with our qualitative side. RDS has conducted creative and insightful focus groups with consumers, meeting planners, sports event organizers, business leaders, industry partners, and elected officials all over the United States and in over 16 international countries. We have pioneered innovative techniques for implementing virtual in-depth interviews (IDI's) that have allowed us to provide cost effective qualitative insights while allowing access to a more diverse geographic base of respondents than traditional focus group research.

We have a truly international focus. RDS has successfully completed panel research, focus groups, in-depth interviews (IDI's), and round table research in Toronto, Montreal, Buenos Aires, Mexico, Chile, Berlin, Frankfurt, Munich, London, Dublin, Glasgow, Paris, Stockholm, and Oslo to gauge market directions for our clients.



Several of our information takers are multilingual to accommodate international visitors (*Spanish*, *French*, and *German*).

We are detail people. RDS's record for precise and timely tourism tracking, ontarget projections, as well as verifiable visitor telemetry is unrivaled.

We're focused, **accessible**, **and responsive**. At the cutting edge of technology and innovation, RDS delivers on-target market intelligence for the promotional efforts of our clients. Contact our office and you will get an answer to your question.

We are dynamic and creative. Our singular focus is to isolate profitable targets for our clients. We uncover new markets, develop strategic and tactical support for industry promotions, and keep our clients informed. Tell us what you need and RDS will provide innovative solutions.

We hire the right people. Achieving excellence and results are important to us, and how we get there matters. Our integrity, ethics, and values help us attract and retain talented employees, build loyalty, and contribute to our clients' bottom lines. All of our activities are staffed and fielded in-house by RDS professionals.

Research Data Services, Inc., as your market research vendor, will bring to the table:

- Sampling techniques, data collection methods, and reporting procedures that are based on "best practice" standards.
- © Quality research that is verifiable and a standard for decision making.
- © Cutting-edge, forward-looking research programs designed to focus limited resources on strategic value-added tasks, calculated to stretch budgets and maximize industry R.O.I.
- © Seasoned professionals with a commitment to respond quickly and innovatively to any question, crisis, or requirement.
- © Accelerated research execution focused on "speed-to-market".
- © An organization that mines data to uncover the elusive.
- © The capability to debrief tourism panels representative of your visitor segments to address market perceptions and future visitation intent.
- An unerring focus on the message behind the numbers.



2. Skills, Abilities, Expertise, and Availability of Staff Assigned to Study

a. Project Team

RDS was founded in 1979 by Walter J. Klages, Ph.D., a tenured Full Professor of Economics at the University of Central Florida, who spearheaded a team of full-time research professionals to respond to the needs of clients in his consulting practice.

It's about the people:

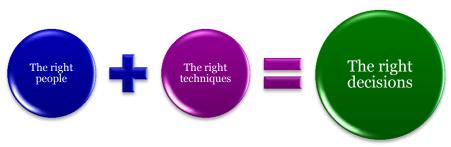
Our expertise, skill, and performance in providing marketing, economic, and statistical research services are well recognized in the tourism industry. Our team's experience brings unique credentials and talents to the tasks germane to the scope of the proposal. Thirty years of experience with Florida tourism and hospitality research have given our professionals unmatched understanding and insight into the challenges and opportunities of Collier's industry.

The core team assigned to this project has successfully cooperated on RDS destination research projects for over two decades. Most of our professionals hold advanced academic degrees in study fields related to the research assignments of this project. All of our staff members have extensive experience in the fields of market research, statistics, management, economics, or systems analysis. We provide state-of-the-art modeling and statistical software design. Advanced computer facilities and resources are a major facet of our research efforts. However, we recognize that we are not experts at everything. So, in addition to our staff, we have a wide range of advisors with whom we work to provide the most up-to-date, cost-efficient research solutions for our clients.

Our vision is to provide our clients innovative research. We want our clients to make profitable decisions based upon timely, targeted, and insightful market intelligence.

We combine a core group of research professionals led by established industry experts. We then leverage the effectiveness of the core with a network of external resources. We pride ourselves on developing long-term partnerships with our clients. We will function as an extension of your organization to ensure that the strategic objectives assigned to our team are met with the utmost professionalism.

It's about our ability to pull together:





RDS has three basic areas of research specialization:

- The Tourism/Hospitality Industry;
- Public Utilities Companies;
- © Litigation Support in Business Loss, Anti-Trust, and Utility Rate Cases.

The RDS staff that will be assigned to the Naples, Marco Island, Everglades CVB research are primarily focused on Tourism/Hospitality related projects. In this context, these professionals will work simultaneously on Collier assignments and similar projects for other Florida and National TDC/CVB clients. Our staff's current and prior experience provides valuable insights into industry trends and comparable statistics.

RDS could not produce the quality of research product with the level of efficiency and speed to execution our clients need and demand without the contributions of every one of our team members. In working on our projects, we constantly rely on one another to provide feedback, ranging from assistance with report formatting to proofreading to input on how to get project processes done faster or more efficiently. We routinely schedule brainstorming sessions to discuss how to exploit and implement creative ideas to improve the research services we provide. Experienced staff members act as mentors for new employees ensuring a continuum of skills and knowledge to respond to clients' requests expeditiously. Employee contributions are measured in terms of the quality of their work product and cost savings.

For more details on the contributions of each employee to our team and this project, please see **Tab II**, **Section 1: Proposed Contract Team**, **Pages 4** – **6** and **Tab V: Pages 50 - 57**.

b. Subcontractors

RDS performs all research services in-house. Although no subcontractors or subconsultants are used, RDS maintains relationships with numerous advisors whose expertise can be called upon as needed. Dr. Walter Klages, President of RDS, will direct the project, overseeing all aspects of research, and functioning as Executive-in-Charge.

3. RDS's Technical Capacities to Meet Scope of Services

Per RDS's best practices, our computer resources and data processing facilities are at the cutting edge. iPad's, Fujitsu and Motion tablets, and Asus Mini computers are employed for computer assisted information taking. We utilize remote Internet-based storage products to ensure the security of our databases.

To maximize the efficiency, accuracy, and effectiveness of our data collection, processing, reporting, and presentation, RDS maintains the following software resources:



For data collection and analysis:

💆 dscout 🥒 FORECAST Pro

© SPSS © Visual CE

© SNAP © Ex-Sample

© Teleform © Evolver Optimizer

© Quantum/Quanvert © Statistica

WinCross
© Zoomerang

For database and project management, reporting, and presentations:

All Clear/Logic Flow
Project 2010

© Word 365 © Milestones

Excel 365 © Maptitude/Business Map/ESRI

Access 365 Business Analyst Online

PowerPoint 365 © Adobe Acrobat

© Pagemaker

4. Financial Strength and Sufficient Credit

Research Data Services, Inc. certifies that we have sufficient financial capacity, working capital, and other financial, technical, and management resources to perform the contract, as well as the necessary personnel, facilities, equipment, and ability to complete the work specified in this Proposal in a satisfactory manner within the time frames specified. In 2015, RDS's total research billings exceeded \$1.1 million dollars, attesting to the company's financial capacity and stability.

5. Tourism, Travel, and Hospitality Projects

The most accurate documentation and reflection of RDS's team's successful experience in working together lies in our satisfied clientele. The following is a list of destination marketing organizations to which Research Data Services is currently providing market research services along with the year we began working on the project. Additionally, please see our client references in *Tab VI*, *References*.

Client	Start Date
Visit St. Petersburg/Clearwater	1985
The Naples, Marco Island, Everglades Convention and Visitors Bureau	1999
The City of Clearwater	2003



Client	Start Date
Orlando North Seminole County Tourism	2004
Amelia Island Tourist Development Council	2007
Bradenton Area Convention and Visitors Bureau	2008
Citrus County Visitors & Convention Bureau	2012
Charlotte Harbor Visitor & Convention Bureau	2013
Experience Kissimmee	2015

The following details a sampling of the tourism, travel, and hospitality work RDS has completed from 2008-2015:

- © 26.2 with Donna Economic Impact Study
- © Amelia Island Film Festival Economic Impact
- Amelia Island Shrimp Festival Economic Impact
- © Baltimore Orioles Spring Training Impact Assessment
- © City of St. Pete Beach (RDS has worked on a series of projects since 2005.)
- Clearwater Bright House Super Boat National Championships Economic Impact
- Florida Georgia Football Classic Economic Impact Study
- © J.N. "Ding" Darling National Wildlife Refuge Alternative Transportation in Parks and Public Lands Project
- Jacksonville Jazz Festival Economic Impact Study
- Jazz Holiday Economic Impact Study
- Konica-Minolta Gator Bowl Economic Impact Study
- C Lighted Boat Parade Economic Impact Study
- © Loudoun County Virginia Convention and Visitors Association Advertising Concept Testing and Brand Building
- Mahaffey Theater Market Potential/Positioning Research
- Major League Baseball Economic Impact Analysis
- Museum of Fine Arts Qualitative Research
- © NCAA Basketball Tournament Economic Impact Study
- NCAA Track and Field Championships Economic Impact Study
- © Pan American Masters Championship Economic Impact



- © Ruth Eckerd Hall Market Potential Research
- Sarasota Bradenton International Airport (SRQ) Outbound Consumer Focus Group
- © Sea and Sky Spectacular Economic Impact Study
- © St. Petersburg Clearwater International Airport Passenger Research (RDS has worked on a series of projects since 1995.)
- © St. Petersburg Pride Festival Economic Impact Study
- © Suncoast Offshore Grand Prix Boat Race Special Event Research
- © Tampa International Airport Business and Leisure Qualitative Research
- The Dalí Museum
- © THE PLAYERS Championship (TPC) Golf Tournament Economic Impact Study
- © The Southwest Florida Water Management District (RDS has worked on a series of population estimation projects since 2003.)
- C Thunder by the Bay Bike Fest Economic Impact Study
- Treasure Island Economic Impact Study

6. Other Clients

The following is a list of select clientele for whom RDS has provided non-destination related research over the past five (5) years:

- ABC Liquor Stores
- Acura
- © Brevard County
- City of Panama City Beach
- © CVS
- © Dodge/Chrysler
- Ford Motor Company
- © KFC
- © Lee County Parks and Recreation Department
- C Lexus
- © McDonalds



- © Papa Johns
- Pinellas County Sheriff's Department
- © Pinellas County Utilities
- © Pinellas Solid Waste Department
- © Pizza Hut
- © Popeye's
- © Publix
- © Southwest Florida Expressway Authority
- © Subway
- © U-Haul
- Walgreens Drug Stores
- Wendy's
- Winn Dixie



V. Specialized Expertise of Team Members

IN THIS SECTION:

- Résumé of Proposed Account Manager
- Experience Matrix
- Leadership Team
 - Affiliated Advisors



Tab V: Specialized Expertise of Team Members

1. Résumé of Proposed Account Manager

Walter J. Klages, Ph.D., President of RDS, will direct the project and serve as account manager for the Naples, Marco Island, Everglades CVB research project.

WALTER J. KLAGES, Ph.D.

Executive-in-Charge



Since 1979, Dr. Walter Klages, President of RDS, has worked with a variety of clients providing the marketing intelligence needed to insure product and service viability and bottom-line profits tailored and sequenced to meet client needs. He will direct the project and function as Executive-in-Charge. Dr. Klages has provided market research services to destinations and CVB's since he started RDS as a business. He brings a comprehensive vision of destination and CVB research services to the tourism industry.

Dr. Klages has designed, executed, analyzed, and presented results from research studies for clients for over 30 years. His extensive experience in research covers a wide variety of topics including branding, new concept development and positioning, customer and employee satisfaction, and performance assessments.

Dr. Klages has pioneered many of the "best practices" in destination market research and visitor studies. He specializes in supporting CVB's in building their direct marketing strategies, boosting the destination's market presence, establishing interactive relationships with their customers, and increasing hotel occupancy and ADR's. While on the faculty of the University of Central Florida, under a grant from the Florida Department of Commerce, Dr. Klages coauthored the input-output model for the Central Florida sector.

He is an active member of the American Statistical Association, the Florida Restaurant and Lodging Association, *Skål*, and a charter member of Visit FLORIDA.

Dr. Klages has previously served as an independent business and economic consultant to a variety of corporations in the U.S., Canada, and Europe. Over the last 35 years, he has been deeply involved with tourism and public opinion research projects in the State of Florida and the United States.

"The answers are always

Dr. Klages' perspective from his 15 years of academic teaching experience with U.S. and Canadian universities combined with his real world

hidden in the data."

Walter J. Klages, Ph.D.



business experience gives him the ability to identify and clearly convey the meanings behind the statistics. He currently serves as a consultant to local, state and federal agencies and private organizations. Dr. Klages is qualified as an economist and statistician to present expert witness testimony. Over the years, he has received many honors, including the following:

Fulbright Scholar; Assistant to the Institute of Economic Geography at the University of Munich; member of Omicron Delta Epsilon, Honor Society in Economics; member of Beta Gamma Sigma, Honor Society in Business Administration; member of Alpha Kappa Psi, Professional Honor Society in Business, Federal Republic of Germany (F.R.G.) Cultural Exchange Fellowship; Lilly Foundation Scholarship; Vice-President of the Southwestern American Association of the Advancement of Slavic Studies; Regional Representative for the Eastern Economic Association; American Statistical Association (ASA); Florida Restaurant and Lodging Association; Skål International Association of Travel and Tourism Professionals; Founding Partner of Visit FLORIDA.

Education: B.A. (equiv.) University of Munich, Munich Germany

Cand. Rer. Pol. Economics, University of Munich

Major field: Resource Economics, Statistics, Input-Output Modeling

Exchange Student:

Faculté de Droit et des Sciences Economiques, Paris, France London School of Economics

Major field: Regional Economics and Planning

Cultural Exchange Fellowship (U.S./F.R.G.):

Southern Methodist University

University of Alabama

Ph.D. University of Alabama

Major field: Economics and History

Academic Lecturer, University of Alabama

Employment: Assistant Professor, University of Alabama

Assistant Professor, York University, Toronto

Associate Professor, Florida Technological University

Professor (tenured) Department of Economics,

University of Central Florida



2. Experience Matrix

Cate	egory	Count
1.	Number of years the project manager has in a leadership role in market research	36
2.	Number of governmental accounts managed by the proposed account manager over the three year period $(1/1/13 - 12/31/15)$	23
3.	Number of proposer's full time equivalent staff (including the account manager) assigned to the County's scope of work in this RFP.	13
4.	Number of other accounts to be managed concurrently by the account manager should this firm receive an award to this RFP.	8

3. Leadership Team

The core team assigned to this project has collaborated on major destination tourism research throughout Florida for over 20 years. The RDS professional team who will be directly involved in this project and assume supervisory responsibilities includes the following professionals. Please see **Tab II**, **Section 1: Proposed Contract Team, Pages 4 - 6** in this proposal for specific details of each RDS team member's role in the Collier research project.

CLAIRE KLAGES

Vice President, Qualitative Research

Education: B.A., Geography

M.A., University of Florida, Gainesville, FL Major field: Urban & Regional Planning



Ms. Klages has been with Research Data Services since 1985. At RDS, her primary responsibilities include focus group implementation and moderation, the development and implementation of new software systems, assisting in the production and presentation of marketing data, and overseeing employees.

Educated and trained as an Urban Planner, with a degree from University of Florida in Urban and Regional Planning, Ms. Klages worked for professional engineering and design firms

on area land use development projects. While at Environmental Associates, Inc., she assisted in producing environmental impact statements, rezoning materials, and land use reports for major utilities and state departments. At Gee & Jenson, Inc., Ms. Klages worked with large community development districts procuring designated infrastructure approvals and tax districting designations.



While at RDS, Ms. Klages has provided facilitation for hospitality clients curious about such hot topics as:

- © Road trips, day trips, and weekend getaway visitation;
- Fall travel market season;
- © Destination brand personalities;
- © Travel motivations and destination selection;
- Adverting campaign testing and effectiveness evaluation;
- The role of Internet and web usage in destination selection;
- 6 Hotel amenities and service expectations among leisure and business guests;
- © Customer satisfaction for resorts, airlines, and attractions;
- Warm weather destination competition rankings;
- Consumer attitudes and uses of public transportation;
- Travel trends among meeting and association planners.

"What is truly important is not WHAT consumers think, but WHY they think it." Claire Klages

Ms. Klages is Vice President and the Secretary/Treasurer of RDS.

ANNE WITTINE

Director of Quantitative Research

Education: B.A., University of South Florida, Tampa, FL

Major field: Mass Communications/Advertising



With over 26 years of market research experience with Research Data Services, Ms. Wittine has been involved in analytical consulting across a diverse range of industries and services for both public and private clients. Her experience is apparent as she proactively understands and anticipates client reporting and analysis needs. With an inherent curiosity and a keen sense of determination, Ms. Wittine is an excellent fit within RDS's leadership team.

Her experience lies in developing proprietary marketing software, the use of statistical software packages (SPSS, Snap, WinCross, Visual CE, Quantum, Excel, and Access) and the application of statistical methods and procedures to analyze visitor profiles and gauge market potential. Since joining RDS in 1989, she has been involved with a wide variety of research projects including image studies, consumer opinion research, advertising effectiveness testing, and marketing strategy studies.



Prior to joining RDS, Ms. Wittine worked for two years for Semco Printing as a graphic artist managing all aspects of pre-printing production. With Ms. Wittine's combination of desktop publishing background, her innate analytical skills, and hands-on research experience, she brings a special blend of talents to the Manatee County project. Our clients know they can call on her for any data request or reporting need.

ANDREA JOHNSTON

Research Manager

Education: B.A., University of Florida,

Gainesville, FL

Major field: Economics

M.A., University of South Florida, Tampa, FL (Expected August 2016)

"A study's findings are only as good as the data

collected." Anne Wittine

Major field: Economics



Prior to joining RDS, Ms. Johnston was a student research assistant at the University of Florida. This position gave her a range of experience conducting research, analyzing data, and interpreting results. She is highly proficient in SPSS, STATA, SAS, Excel, and Snap. She has also held the position of graduate teaching assistant in economics at the University of South Florida.

NICOLE GRATES

Project Director

Education: B.S., University of Tampa, Tampa, FL

Major field: Marketing



Prior to joining RDS in 2007, Ms. Grates was an Intern for the Contemporary Marketing Team at Busch Gardens. She received in-depth training in multiple areas of operational marketing, including developing and conducting in-depth interviews with meeting planners to gather information about promoting the Park as a venue for corporate events.



ANN F. HARRISON

Psychographic Research

Education: B.A., Rhodes College, Memphis, TN M.A. Memphis State University, Memphis, TN

Major field: Psychology



Ms. Harrison area of specific expertise is developing innovative marketing research solutions that align with organizational needs to increase market share and profitability. She has a wealth of experience in undertaking projects for government and other public sector institutions. Ms. Harrison has been actively involved in measuring the

impacts of tourism activity, market position, and emerging opportunities. Since joining RDS in 1986, she has been involved in measuring economic trends, as well as changes in tourism supply and demand for our clients.

Ms. Harrison is responsible for coordinating the design and development of the statistical methodologies to be used for the project. She provides critical input to sample design; weighting and estimation; design of quality control methodologies; and the statistical aspects of data dissemination and analysis.

IAZMINE RIZZO

Market Research Data Analyst

Education: B.B.A., University of Miami, Coral Gables, Florida

M.B.A., University of South Florida, Tampa, Florida Major field: International Finance and Marketing



Before joining RDS in 1999, Ms. Rizzo worked for five years with PanAmSat as a Manager of Global CDV Systems. Her responsibilities included:

- Management and supervision of global compressed digital video systems and supporting personnel;
- Training supporting personnel in basic understanding of PAS digital controlling systems;
- © Performing value added customer support to customers/programmers and their respective affiliates for PanAMSat satellite fleet;
- Organization and distribution of special projects and reporting functions to upper management;
- © Coordination of customer integration into digital controlling system.



IANET HOME

Quality Supervisor

Education: B.A., Elmhurst College, IL Major field: Business Administration



Ms. Home joined RDS's team in 1999 and brings to the table wide-ranging experiences in finance and business management.

Ms. Home is responsible for the financial management of the company and oversees the Administrative, HR, and Legal project teams. Additionally, she is responsible for project time keeping and billing and has extensive experience invoicing governmental clients. For this project, her role will include supervisory responsibilities and quality control.

ARLYSE McDOWELL

Field Services Manager

Education: B.S., University of Toledo, Toledo, OH

Major field: Social Sciences, History, and Education



Her experience includes:

- Facilitator for Life Skills Program
- Volunteer for Take Stock in Children
- Certified Guardian ad Litem
- © Co-Founder of the Youth Writers Program
- © Case Manager for the Council on Aging
- Teacher for the Nassau County School System
- © Co-Owner of McDowell Media Services

LISA TERIAN

Field Supervisor

Education: Walsh College, Troy, MI

Major field: Hospitality Services



Prior to joining RDS in 2014, Ms. Terian's experiences included service as a marketing and sales coordinator for a Collier County resort. Her responsibilities included management of the resort's social media and websites, development of PACE reporting spreadsheets, and staff training. These experiences give her important insight into Collier's tourism industry. **Ms. Terian** is a Collier resident.



MICHELE BOONE

Industry Liaison

Education: B.A., University of Toledo, Toledo, OH

Major field: Business



Ms. Boone joined RDS in 2012, bringing extensive experience in accounting, human resources, and customer service/outreach. Her prior experience includes the management and operation of several staffing/placement companies.

MARGOT GEORGE

Visitor Profile Specialist



Ms. George has been a Visitor Profile Specialist with RDS since 2008. She collects primary visitor data. Ms. George has extensive experience in customer and public relations and loves talking to people. She speaks German.

ROSIE PANNONE

Visitor Profile Specialist



Ms. Pannone is a Visitor Profile Specialist for RDS. She is involved in the collection of primary and secondary data. Ms. Pannone has been with RDS since 2001.

She comes to us with extensive experience in the travel and hospitality industry. She loves the opportunity to talk to people and is very comfortable interacting with consumers from all walks of life.



Affiliated Advisors

MICHAEL H. TRUSCOTT, Ph.D.

Dana Professor, Economics

Education: Ph.D. Economics, Louisiana State University, LA

M.B.A. Memphis State University, TN

B.A., Education, Southwestern at Memphis, TN



Dr. Truscott is an expert on all aspects of global finance and economics, from the problems of emerging nations to the intricacies of exchange rate fluctuations in the global economy. He teaches Principles of Macroeconomics; Seminar in Economics (Senior Capstone Course); Macroeconomics and Global Issues (MBA) at the University of Tampa. Dr. Truscott directs his research to focus on areas where it can be applied to either real world situations or to the more effective teaching of economic

principles. Consequently, he uses cutting edge behavioral simulations to teach complex international trade concepts and has published on the subject in professional journals. He is very knowledgeable on how a country's balance of trade and balance of payments affect its economy.

Dr. Truscott's extensive background with exchanges rates, econometrics, and situational analysis will be invaluable in our estimations of the impact of tourism and our forecasting of tourism trending.

N. RONALD BENNETT, C.P.A.

Fiscal, Tax, and Feasibility Analyst

Education: B.S. Bachelor of Aerospace Engineering (with high honors), Georgia Institute of Technology, Atlanta, Georgia

M.B.A. in Finance, Florida State University, Tallahassee, Florida



Mr. Bennett is a CPA and has prepared business valuations for estate tax purposes and performed audits of governmental entities, nonprofit organizations, and for-profit businesses. He focuses on internal controls, management information systems reviews, and staffing requirements. Mr. Bennett also provides tax services for corporations, partnerships, nonprofit organizations, trusts, estates, retirement plans, and individuals. He is experienced in accounting, auditing, management

consulting, and financial management and has extensive government billing experience.



He is also a statistician by training and oversees developing simulation, feasibility, and forecast models for client projects. Mr. Bennett is an expert in taxes and fiscal impacts and assists in developing Value of Tourism statements. He has worked with RDS as an advisor since 1997.

STEPHEN J. PREISACH

IT and Programming



With over 35 years programming experience including more than 20 years' experience with Oracle, Mr. Preisach is familiar with many operating systems and programming languages on a variety of systems.

He has extensive UNIX and Linux experience on machines ranging from 100+ user multi-processor IBM, HP, Sun and Sequent systems to personal computers; Windows on personal computers; can program fluently in C, PL/SQL, Perl and other languages; has extensive experience designing, maintaining, and

testing software and database systems; dynamic Web applications using Oracle Application Server and Perl CGI.

Mr. Preisach has completed system design work for many mini and micro based computer projects and has experience working with people as a manager, in training sessions, and through telephone customer support. He designed and presented classes on commercial and custom software. Mr. Preisach has extensive experience with custom software programming. He will provide technical support, maintain RDS's network, and write custom software for managing clients' databases.



VI. References



Attachment 9: Reference Questionnaire

Solicitation. 10-0303 IDC Research	Jei vices	
Reference Questionnaire for:		
Research Data Services, Inc		
(Name of Company Requesting Refe	erence Information)	
Walter J. Klages, Ph.D.	nonce information,	
(Name of Individuals Requesting Ref	erence Information)	
Name: Elliott Falcione	Compa	iny: Bradenton Area CVB
(Evaluator completing reference	questionnaire)	(Evaluator's Company completing reference)
Email: elliott.falcione@bacvb.com	EAV: (0/1) 720 1920	Telephone: (941) 729-9177
Collier County is implementing a proces	s that collects reference in	nformation on firms and their key personnel to be use
in the selection of firms to perform this p	project. The Name of the	Company listed in the Subject above has listed you as
·	•	omplete the survey. Please rate each criteria to the
, , ,		that you were very satisifed (and would hire the
,	•	• • • • • • • • • • • • • • • • • • • •
		isfied (and would never hire the firm/indivdiual again)
If you do not have sufficient knowledge	of past performance in a p	particular area, leave it blank and the item or form will
be scored "0."		

Project Description: _Professional Marketing Research Services Completion Date: _December 25, 2018 Services Project Budget: _\$88,845 per year (Core Services) Project Number of Days: _1,825 Change Orders - Dollars Added : _4 (\$27,460) = Change Orders - Days Added: _N/A

Item	Criteria	Score
1	Ability to manage the project costs (minimize change orders to scope).	10
2	Ability to maintain project schedule (complete on-time or early).	10
3	Quality of work.	10
4	Quality of consultative advice provided on the project.	10
5	Professionalism and ability to manage personnel.	10
6	Project administration (completed documents, final invoice, final product turnover; invoices; manuals or going forward documentation, etc.)	10
7	Ability to verbally communicate and document information clearly and succinctly.	10
8	Abiltity to manage risks and unexpected project circumstances.	10
9	Ability to follow contract documents, policies, procedures, rules, regulations, etc.	10
10	Overall comfort level with hiring the company in the future (customer satisfaction).	10
	TOTAL SCORE OF ALL ITEMS	100

Please FAX this completed survey to: _(813) 223-2986 By _January 27, 2016_



	Attachment 9: Reference Questionnaire	
Solicita	tion: 16-6563 TDC Research Services	
Referen	ce Questionnaire for:	
Researc	h Data Services, Inc	
(Nam	ie of Company Requesting Reference Information)	
Walter J	. Klages, Ph.D.	
(Nam	ne of Individuals Requesting Reference Information)	
*		
	Gil Langley, CAE Company: Amelia Island Conventio	
(i	Evaluator completing reference questionnaire) (Evaluator's Company co	mpleting reference)
		904) 277-4369
	ounty is implementing a process that collects reference information on firms and their	
	lection of firms to perform this project. The Name of the Company listed in the Subject	
	or which they have previously performed work. Please complete the survey. Please re	
	our knowledge on a scale of 1 to 10, with 10 representing that you were very satisited	
	vidual again) and 1 representing that you were very unsatisfied (and would never hire t	
	not have sufficient knowledge of past performance in a particular area, leave it blank	and the item or form will
be score	d "0."	
Duntant I	Description Visites Dealis Describe Consists Completion Date: On saint	
Project I	Description: Visitor Profile Research Services Completion Date: On-going	
Graine) I	Budget: _\$42,000 per year (Core Services) Project Number of Days: On-going	
rrojeci	budget. 342,000 per year (Core Services) Project Namber of Days. Orroding	· · · · · · · · · · · · · · · · · · ·
Change	Orders - Dollars Added : As Needed = Change Orders - Days Added: N/A	
Onlange	Olders - Dollars Added : _As Needed Olders - Days Added: _NA	
item	Criteria	Score
1	Ability to manage the project costs (minimize change orders to scope).	10
2	Ability to maintain project schedule (complete on-time or early).	10
3	Quality of work.	10
4	Quality of consultative advice provided on the project.	10
····		
5	Professionalism and ability to manage personnel.	10
6	Project administration (completed documents, final invoice, final product turnover,	10
	invoices; manuals or going forward documentation, etc.)	
7	Ability to verbally communicate and document information clearly and succinctly.	10
8	Abilitity to manage risks and unexpected project circumstances.	10
O	Ability to manage risks and unexpected project chounistances.	10
9	Ability to follow contract documents, policies, procedures, rules, regulations, etc.	10
_	francial resources accommendation of benefit benefit benefit and the second of the sec	I

By January 27, 2016 Please FAX this completed survey to: (813) 223-2986

Overall comfort level with hiring the company in the future (customer satisfaction).

TOTAL SCORE OF ALL ITEMS

10

10

100

01/29/2016 10:18 #064 P.001/001 March 28, 2016 New Business 7-c

108 of 156



Attachment 9: Reference Questionnaire

Attachment 5. Nebelence Questionnale	
Solicitation: 16-6563 TDC Research Services	
Reference Questionnaire for:	
Research Data Services, Inc	
(Name of Company Requesting Reference Information)	
Walter J. Klages, Ph.D.	
(Name of Individuals Requesting Reference Information)	
Name: Adam D. Thomas Company: Citrus County Visitors & Co	nvention Bureau
(Evaluator completing reference questionnaire) (Evaluator's Company comp	
	,
Email: Adam.Thomas@visitcitrus.com FAX: (352) 794-5508 Telephone: (352)	
Collier County is implementing a process that collects reference information on firms and their key	
in the selection of firms to perform this project. The Name of the Company listed in the Subject at	
a client for which they have previously performed work. Please complete the survey. Please rate	
best of your knowledge on a scale of 1 to 10, with 10 representing that you were very satisifed (an	
firm/individual again) and 1 representing that you were very unsatisfied (and would never hire the	
If you do not have sufficient knowledge of past performance in a particular area, leave it blank and be scored "0."	the item or form will
be scored 'U.	
Project Description: Tourism Research Completion Date: September 30, 2016	
	
Project Budget: \$22,200 per year Project Number of Days: 365 (Ongoing	g)
Change Orders - Dollars Added : <u>N/A</u> = Change Orders - Days Added: <u>N/A</u>	
Item Criteria	Score
1 Ability to manage the project costs (minimize change orders to scope).	
	10
Ability to maintain project schedule (complete on-time or early).	10
3 Quality of work.	
3 Quality of work.	10
4 Quality of consultative advice provided on the project.	10 1
	*
5 Professionalism and ability to manage personnel.	10

3	Quality of work.	10
4	Quality of consultative advice provided on the project.	10
5	Professionalism and ability to manage personnel.	10
6	Project administration (completed documents, final invoice, final product turnover; invoices; manuals or going forward documentation, etc.)	10
7	Ability to verbally communicate and document information clearly and succinctly.	10
8	Abiltity to manage risks and unexpected project circumstances.	(0
9	Ability to follow contract documents, policies, procedures, rules, regulations, etc.	10
10	Overall comfort level with hiring the company in the future (customer satisfaction).	10
	TOTAL SCORE OF ALL ITEMS	100

Please FAX this completed survey to: (813) 223-2986

By <u>January 27, 2016</u>

16-6563



Attachment 9: Reference Questionnaire

Reference Questionnaire for: Research Data Services, Inc	
(Name of Company Requesting Reference Information Walter J. Klages, Ph.D.	n)
(Name of Individuals Requesting Reference Information	on)
Name: DT Minich (Evaluator completing reference questionnaire)	Company: Experience Kissimmee (Evaluator's Company completing reference)
Email: DMinich@experiencekissimmee.com FAX:	Telephone: (407) 569-4801
in the selection of firms to perform this project. The Name a client for which they have previously performed work. F best of your knowledge on a scale of 1 to 10, with 10 repr firm/individual again) and 1 representing that you were ve	erence information on firms and their key personnel to be used of the Company listed in the Subject above has listed you as Please complete the survey. Please rate each criteria to the esenting that you were very satisifed (and would hire the ry unsatisfied (and would never hire the firm/indivdiual again). ce in a particular area, leave it blank and the item or form will

Project Description: _______ Completion Date: _______ January 31, 2016

Change Orders - Dollars Added : <u>As Needed</u> = Change Orders - Days Added: <u>N/A</u>

Project Number of Days: __365_

Project Budget: _\$121,100 per year (Core Services)_

Item	Criteria	Score		
1	Ability to manage the project costs (minimize change orders to scope).			
2	Ability to maintain project schedule (complete on-time or early).	9		
3	Quality of work.	10		
4	Quality of consultative advice provided on the project.	10		
5	Professionalism and ability to manage personnel.	10		
6	Project administration (completed documents, final invoice, final product turnover; invoices; manuals or going forward documentation, etc.)	8		
7	Ability to verbally communicate and document information clearly and succinctly.	9		
8	Abiltity to manage risks and unexpected project circumstances.	9		
9	Ability to follow contract documents, policies, procedures, rules, regulations, etc.	9		
10	Overall comfort level with hiring the company in the future (customer satisfaction).	10		
	TOTAL SCORE OF ALL ITEMS	94		

Please FAX this completed survey to: _(813) 223-2986 By _January 27, 2016



Attachment 9: Reference Questionnaire Solicitation: 16-6563 TDC Research Services Reference Questionnaire for: Research Data Services, Inc. (Name of Company Requesting Reference Information) Walter J. Klages, Ph.D. (Name of Individuals Requesting Reference Information) Name: Lucy Nicandri Company: Suncoast Charities for Children (Evaluator completing reference questionnaire) (Evaluator's Company completing reference) Email: lucy.nicandri@suncoastcc.org FAX: (941) 706-3795 Ext. 101 Telephone: (941) 706-3825 Collier County is implementing a process that collects reference information on firms and their key personnel to be used in the selection of firms to perform this project. The Name of the Company listed in the Subject above has listed you as a client for which they have previously performed work. Please complete the survey. Please rate each criteria to the best of your knowledge on a scale of 1 to 10, with 10 representing that you were very satisifed (and would hire the firm/individual again) and 1 representing that you were very unsatisfied (and would never hire the firm/indivdiual again). If you do not have sufficient knowledge of past performance in a particular area, leave it blank and the item or form will be scored "0." Project Description: Special Event Impact Studies Completion Date: Ongoing Project Budget: \$7,800 per year (Two Events) Project Number of Days: Ongoing Change Orders - Dollars Added: N/A Change Orders - Days Added: N/A Ability to manage the project costs (mínimize change orders to scope). 0 2 Ability to maintain project schedule (complete on-time or early). đ $\widetilde{\mathfrak{z}}$ Quality of work. 10 Quality of consultative advice provided on the project. 17 5 Professionalism and ability to manage personnel. σ 6 Project administration (completed documents, final invoice, final product turnover; invoices; manuals or going forward documentation, etc.) 10 Ability to verbally communicate and document information clearly and succinctly. \mathcal{O} 8 Abilitity to manage risks and unexpected project circumstances. σ Ability to follow contract documents, policies, procedures, rules, regulations, etc. 9 10 Overall comfort level with hiring the company in the future (customer satisfaction). 10 D TOTAL SCORE OF ALL ITEMS 100 Please FAX this completed survey to: (613) 223-2986 By January 28, 2016 issearch Rata has done a great job our charity since 2008 !! 16-6563 **TOC Research Services**



VII. Acceptance of Conditions



Tab VII. Acceptance of Conditions

Research Data Services, Inc. hereby agrees to comply with all items, terms, conditions, and specifications detailed in your Request for Proposal 16-6563.

Research Data Services, Inc. agrees as a pre-condition of consideration, that, if selected to provide research services for this project, we will provide Certificates of Insurance in accordance with all of the County's insurance requirements as outlined in Exhibit IV, Pages 19-20 and Attachment 8 of RFP Number 16-6563.

Research Data Services, Inc. certifies that we have sufficient financial capacity, working capital, and other financial, technical, and management resources to perform the contract, as well as the necessary personnel, facilities, equipment, and ability to complete the work specified in this Proposal in a satisfactory manner within the time frames specified.

Research Data Services, Inc. agrees as a pre-condition of consideration, that we will enter into a contract agreeable to Collier County and the Naples, Marco Island, Everglades Convention and Visitors Bureau containing a "hold harmless" indemnity clause.

Research Data Services, Inc. shall observe and obey all laws, ordinances, rules, and regulations of the federal, state, and local municipality, including Immigration Laws, Equal Opportunity Employment (EEO), Minority Business Enterprise (MBE), and OSHA which are applicable to the services supplied under this contract. Also, we will have or obtain all necessary permits or licenses required for the operation of said business.



Research Data Services, Inc. has a corporate recycling policy. Our program includes routinely utilizing recycled products including paper and toner cartridges. We recycle used white paper, cardboard, toner cartridges, and ink jet cartridges. We dispose of batteries, equipment, and solvents in a responsible manner, as well as promote environmentally safe behaviors with awareness posters and information in the office. *This proposal is printed on paper that is* 30% recycled content.

In the event of a public emergency, disaster, hurricane, tornado, flood, or other act of God, **Research Data Services, Inc.** will give Collier County "first priority" for goods and services.



Conflict of Interest Certification:

The undersigned proposer hereby certifies that he is not, and will not be violating either directly or indirectly any conflict of interest statute or any other applicable statute or principle by his performance of this service.

I hereby agree to abide by all conditions of this Request for Proposal and certify that I am authorized to sign this proposal for the proposer.

Signed this 1st day of February, 2016, in Tampa, Florida, County of Hillsborough.

Authorized Signature:

Walter J. Klages, Ph.D.

President

RESEARCH DATA SERVICES, INC.

777 South Harbour Island Boulevard
Suite 260
Tampa, Florida 33602
(813) 254-2975





VIII. Required Form Submittals

IN THIS SECTION:

- Attachment 2: Vendor Check List
- Attachment 3: Conflict of Interest Affidavit
- Attachment 4: Vendor Declaration Statement
- Attachment 5: Affidavit for Claiming Status as a Local Business
- Attachment 6: Immigration Affidavit Certification
- Attachment 7: Vendor Substitute W-9
- Attachment 8: Insurance and Bonding Requirements



Attachment 2: Vendor Check List

<u>IMPORTANT</u> : THIS SHEET MUST BE SIG	NED. Please read carefully, sign in the spaces
indicated and return with your Proposal.	Vendor should check off each of the following items as the
necessary action is completed:	

	• · · · · · · · · · · · · · · · · · · ·				
\boxtimes	The Proposal has been sign	ned.			
\boxtimes	All applicable forms have be requirements of the project.	een signed and included, along with licenses to complete the			
\boxtimes	Any addenda have been sig	ned and included.			
	The mailing envelope has been addressed to: Collier County Government Purchasing Department 3327 Tamiami Trail E Naples FL 34112 Attn: Adam Northrup, Procurement Strategist				
\boxtimes	The mailing envelope <u>mus</u> Services and 1/29/2016.	st be sealed and marked with Solicitation 16-6563 – TDC Research			
\boxtimes	The Proposal will be mailed and time. (Otherwise Propo	or delivered in time to be received no later than the specified <u>due date</u> esal cannot be considered.)			
	If submitting a manual bid, include any addenda (initialed and dated noting understanding and receipt). If submitting bid electronically, bidder will need to download all related documents on www.colliergov.net/bid. The system will date and time stamp when the addendum files were downloaded.				
	COURIER-DELIVERED PRO SIDE OF THE COURIER PA	OPOSALS MUST HAVE THE <u>RFP NUMBER AND TITLE ON THE</u> CKET.			
Name	e of Firm:	Research Data Services, Inc.			
Address:		777 South Harbour Island Boulevard, Suite 260			
City, State, Zip:		Tampa, Florida 33602			
Telephone:		ned and included. een addressed to: ernment ment IE up, Procurement Strategist t be sealed and marked with Solicitation 16-6563 – TDC Research or delivered in time to be received no later than the specified due date sal cannot be considered.) include any addenda (initialed and dated noting understanding and ectronically, bidder will need to download all related documents on a system will date and time stamp when the addendum files were DPOSALS MUST HAVE THE RFP NUMBER AND TITLE ON THE CKET. Research Data Services, Inc. 777 South Harbour Island Boulevard, Suite 260			
Email:		WJKlages@ResearchDataLLC.com or Research@KlagesGroup.com			
Representative Signature:					
Representative Name:		Walter J. Klages, Ph.D., President/CEO Date February 1, 2016			

2015 - 2016 HILLSBOROUGH COUNTY BUSINESS TAX RECEIPT

March 28, 2010 OUNT NO.

EXPIRES SEPTEMBER 30, 2018 USIT 25327 00

116ROTNESMOAL

Law Library Fee

Receipt Fee

54.00

Hazardous Waste Surcharge

0.00 0.00

Employees

BUSINESS RESEARCH DATA SERVICES INC 777 HARBOUR ISLAND BLVD #260

TAMPA, FL 33602

280.044000 Public service

2015 - 2016

NAME MAILING

OCC. CODE

RESEARCH DATA SERVICES INC 777 HARBOUR ISLAND BLVD #260

ADDRESS TAMPA, FL 33602

Paid 14-625-068599 07/09/2015 54.00

HAS HEREBY PAID A PRIVILEGE TAX TO ENGAGE IN BUSINESS, PROFESSION, OR OCCUPATION SPECIFIED HEREON

DOUG BELDEN, TAX COLLECTOR

813-635-5200 THIS BECOMES A TAX RECEIPT WHEN VALIDATED.



Attachment 3: Conflict of Interest Affidavit

By the signature below, the firm (employees, officers and/or agents) certifies, and hereby discloses, that, to the best of their knowledge and belief, all relevant facts concerning past, present, or currently planned interest or activity (financial, contractual, organizational, or otherwise) which relates to the proposed work; and bear on whether the firm (employees, officers and/or agents) has a possible conflict have been fully disclosed.

Additionally, the firm (employees, officers and/or agents) agrees to immediately notify in writing the Procurement Director, or designee, if any actual or potential conflict of interest arises during the contract and/or project duration.

Firm:	Research Data Services, Ind.
Signature and Date:	
Print Name	Walter J. Klages, Ph.D.
Title of Signatory	President/CEO
State of	Florida
County of	Hillsborough
SUBSCRIBED AND 20 16 by Walter Tree	SWORN to before me this, day of, who is personally known to me to be the, for the Firm, OR who produced the following
identification <u>F/</u>	
Notary Public	Sabine Hunter
My Commission Exp	ires <u>Aug 4, 2019</u>
	SABINE HUNTER Notary Public - State of Florida Commission # FF 237345 My Comm. Expires Aug 4, 2019 Bonded through National Notary Asso.



Attachment 4: Vendor Declaration Statement

BOARD OF COUNTY COMMISSIONERS Collier County Government Complex Naples, Florida 34112

RE: Solicitation: 16-6563 - TDC Research Services

Dear Commissioners:

The undersigned, as Vendor declares that this proposal is made without connection or arrangement with any other person and this proposal is in every respect fair and made in good faith, without collusion or fraud.

The Vendor agrees, if this proposal is accepted, to execute a Collier County document for the purpose of establishing a formal contractual relationship between the firm and Collier County, for the performance of all requirements to which the proposal pertains. The Vendor states that the proposal is based upon the proposal documents listed by **Solicitation: 16-6563 – TDC Research Services.**

(Proposal Continued on Next Page)

PROPOSAL CONTINUED

IN WITNESS WHEREOF, WE have hereunto subscribed our names on this 1st day of February, 2016 in the County of Hillsborough, in the State of Florida.

Firm's Legal Name:	Research Data Services, Inc.
Address:	777 South Harbour Island Boulevard, Suite 260
City, State, Zip Code:	Tampa, Florida 33602
Florida Certificate of Authority Document Number: Federal Tax Identification	637933
Number	59-2042612
CCR # or CAGE Code	N/A
Telephone:	(813) 254-2975
FAX:	(813) 223-2986
Signature by: (Typed and written)	Walter J. Klages, Ph.D.
Title:	President CEO
	Additional Contact Information
Send payments to: (required if different from above)	Same
Contact name:	
Title:	
Address:	
City, State, ZIP	
Telephone:	
FAX:	
Email:	WJKlages@ResearchDataLLC.com or Research@KlagesGroup.com
Office servicing Collier County to place orders (required if different from above)	Same
Contact name:	
Title:	
Address:	
City, State, ZIP	
Telephone:	Email

State of Florida Department of State

I certify from the records of this office that RESEARCH DATA SERVICES, INC. is a corporation organized under the laws of the State of Florida, filed on September 28, 1979.

The document number of this corporation is 637933.

I further certify that said corporation has paid all fees due this office through December 31, 2015, that its most recent annual report/uniform business report was filed on April 2, 2015, and that its status is active.

I further certify that said corporation has not filed Articles of Dissolution.

Given under my hand and the Great Seal of the State of Florida at Tallahassee, the Capital, this the Twenty-second day of January, 2016



Secretary of State

Tracking Number: CU7104005950

To authenticate this certificate, visit the following site, enter this number, and then follow the instructions displayed.

https://services.sunbiz.org/Filings/CertificateOfStatus/CertificateAuthentication

Research Data Services is NOT claiming status as a local business.



Attachment 5: Affidavit for Claiming Status as a Local Business

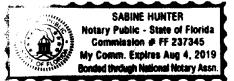
Solicitation: 16-6563 – TDC Research Services (Check Appropriate Boxes Below) State of Florida (Select County if Vendor is described as a Local Business Collier County ☐ Lee County Vendor affirms that it is a local business as defined by the Purchasing Policy of the Collier County Board of County Commissioners and the Regulations Thereto. As defined in Section XI of the Collier County Purchasing Policy: Local business means the vendor has a current Business Tax Receipt issued by the Collier County Tax Collector for at least one year prior to bid or proposal submission to do business within Collier County, and that identifies the business with a permanent physical business address located within the limits of Collier County from which the vendor's staff operates and performs business in an area zoned for the conduct of such business. A Post Office Box or a facility that receives mail, or a non-permanent structure such as a construction trailer, storage shed, or other non-permanent structure shall not be used for the purpose of establishing said physical address. In addition to the foregoing, a vendor shall not be considered a "local business" unless it contributes to the economic development and well-being of Collier County in a verifiable and measurable way. This may include, but not be limited to, the retention and expansion of employment opportunities, support and increase to the County's tax base, and residency of employees and principals of the business within Collier County. Vendors shall affirm in writing their compliance with the foregoing at the time of submitting their bid or proposal to be eligible for consideration as a "local business" under this section. A vendor who misrepresents the Local Preference status of its firm in a proposal or bid submitted to the County will lose the privilege to claim Local Preference status for a period of up to one year. Vendor must complete the following information: Year Business Established in Collier County or Lee County: N/A Number of Employees (Including Owner(s) or Corporate Officers): 25 Full and Part Time Number of Employees Living in Collier County or Lee (Including Owner(s) or Corporate Officers): 1 If requested by the County, vendor will be required to provide documentation substantiating the information given in this affidavit. Failure to do so will result in vendor's submission being deemed not applicable. Vendor Name: Research Data Services Date: February 1, 2016 Collier or Lee County Address: Signature: Title: _President/CEO STATE OF FLORIDA Hillsborough County COLLIER COUNTY LEE COUNTY Sworn to and Subscribed Before Me, a Notary Public, for the above State and County, on this 1/54 Day of

Notary Public Sabine Hunte

My Commission Expires: Aug 4, 2019

(AFFIX OFFICIAL SEAL)

February, 20 1





Attachment 6: Immigration Affidavit Certification

Solicitation: 16-6563 - TDC Research Services

This Affidavit is required and should be signed, notarized by an authorized principal of the firm and submitted with formal Invitations to Bid (ITB's) and Request for Proposals (RFP) submittals. Further, Vendors / Bidders are required to enroll in the E-Verify program, and provide acceptable evidence of their enrollment, at the time of the submission of the vendor's/bidder's proposal. Acceptable evidence consists of a copy of the properly completed E-Verify Company Profile page or a copy of the fully executed E-Verify Memorandum of Understanding for the company. Failure to include this Affidavit and acceptable evidence of enrollment in the E-Verify program, may deem the Vendor / Bidder's proposal as non-responsive.

Collier County will not intentionally award County contracts to any vendor who knowingly employs unauthorized alien workers, constituting a violation of the employment provision contained in 8 U.S.C. Section 1324 a(e) Section 274A(e) of the immigration and Nationality Act ("INA").

Collier County may consider the employment by any vendor of unauthorized aliens a violation of Section 274A (e) of the INA. Such Violation by the recipient of the Employment Provisions contained in Section 274A (e) of the INA shall be grounds for unilateral termination of the contract by Collier County.

Vendor attests that they are fully compliant with all applicable immigration laws (specifically to the 1986 Immigration Act and subsequent Amendment(s)) and agrees to comply with the provisions of the Memorandum of Understanding with E-Verify and to provide proof of enrollment in The Employment Eligibility Verification System (E-Verify), operated by the Department of Homeland Security in partnership with the Social Security Administration at the time of submission of the Vendor's / Bidder's proposal.

Company Name	Research Data Service	es, Inc.			
Print Name	Walter J. Klages, Ph.D		Title	President/CEO	
Signature		5	Date	1/2/2016	
State of <u>Florida</u>			** ***;	1	
County of <u>Hillsbo</u>	rough				
20 <i>[(O</i> , by	rument was signed and	_		-	/
(Printor Type N	e <u>n <i>Kloges</i></u> who has pi lame)	roduced <u>F ل</u> ا Type of ا	tiver Licens dentification and N	<u>၄୯</u> as identification umber)	
Galie	Fluto	NAME OF THE PARTY	SABINE HUNTE	,	
Notary Public Signatu Sabine l	re		Notary Public - State o Commission # FF 23	f Florida T	
Printed Name of Nota	n*		My Comm. Expires Aug Sanded through National No	4. 2019	
Notary Commission N	lumber/Expiration	7		7 7100H.	

The signee of this Affidavit guarantees, as evidenced by the sworn affidavit required herein, the truth and accuracy of this affidavit to interrogatories hereinafter made.

THE E-VERIFY PROGRAM FOR EMPLOYMENT VERIFICATION MEMORANDUM OF UNDERSTANDING

ARTICLE I

PURPOSE AND AUTHORITY

This Memorandum of Understanding (MOU) sets forth the points of agreement between the Department of Homeland Security (DHS) and Research Data Services, Inc. (Employer) regarding the Employer's participation in the Employment Eligibility Verification Program (E-Verify). This MOU explains certain features of the E-Verify program and enumerates specific responsibilities of DHS, the Social Security Administration (SSA), and the Employer. E-Verify is a program that electronically confirms an employee's eligibility to work in the United States after completion of the Employment Eligibility Verification Form (Form I-9). For covered government contractors, E-Verify is used to verify the employment eligibility of all newly hired employees and all existing employees assigned to Federal contracts or to verify the entire workforce if the contractor so chooses.

Authority for the E-Verify program is found in Title IV, Subtitle A, of the Illegal Immigration Reform and Immigrant Responsibility Act of 1996 (IIRIRA), Pub. L. 104-208, 110 Stat. 3009, as amended (8 U.S.C. § 1324a note). Authority for use of the E-Verify program by Federal contractors and subcontractors covered by the terms of Subpart 22.18, "Employment Eligibility Verification", of the Federal Acquisition Regulation (FAR) (hereinafter referred to in this MOU as a "Federal contractor with the FAR E-Verify clause") to verify the employment eligibility of certain employees working on Federal contracts is also found in Subpart 22.18 and in Executive Order 12989, as amended.

ARTICLE II

FUNCTIONS TO BE PERFORMED

A. RESPONSIBILITIES OF SSA

- 1. SSA agrees to provide the Employer with available information that allows the Employer to confirm the accuracy of Social Security Numbers provided by all employees verified under this MOU and the employment authorization of U.S. citizens.
- 2. SSA agrees to provide to the Employer appropriate assistance with operational problems that may arise during the Employer's participation in the E-Verify program. SSA agrees to provide the Employer with names, titles, addresses, and telephone numbers of SSA representatives to be contacted during the E-Verify process.
- 3. SSA agrees to safeguard the information provided by the Employer through the E-Verify program procedures, and to limit access to such information, as is appropriate by law, to individuals responsible for the verification of Social Security Numbers and for evaluation of the E-Verify program or such other persons or entities who may be authorized by SSA as governed

by the Privacy Act (5 U.S.C. § 552a), the Social Security Act (42 U.S.C. 1306(a)), and SSA regulations (20 CFR Part 401).

- 4. SSA agrees to provide a means of automated verification that is designed (in conjunction with DHS's automated system if necessary) to provide confirmation or tentative nonconfirmation of U.S. citizens' employment eligibility within 3 Federal Government work days of the initial inquiry.
- 5. SSA agrees to provide a means of secondary verification (including updating SSA records as may be necessary) for employees who contest SSA tentative nonconfirmations that is designed to provide final confirmation or nonconfirmation of U.S. citizens' employment eligibility and accuracy of SSA records for both citizens and non-citizens within 10 Federal Government work days of the date of referral to SSA, unless SSA determines that more than 10 days may be necessary. In such cases, SSA will provide additional verification instructions.

B. RESPONSIBILITIES OF DHS

- 1. After SSA verifies the accuracy of SSA records for employees through E-Verify, DHS agrees to provide the Employer access to selected data from DHS's database to enable the Employer to conduct, to the extent authorized by this MOU:
 - Automated verification checks on employees by electronic means, and
 - Photo verification checks (when available) on employees.
- 2. DHS agrees to provide to the Employer appropriate assistance with operational problems that may arise during the Employer's participation in the E-Verify program. DHS agrees to provide the Employer names, titles, addresses, and telephone numbers of DHS representatives to be contacted during the E-Verify process.
- 3. DHS agrees to make available to the Employer at the E-Verify Web site and on the E-Verify Web browser, instructional materials on E-Verify policies, procedures and requirements for both SSA and DHS, including restrictions on the use of E-Verify. DHS agrees to provide training materials on E-Verify.
- 4. DHS agrees to provide to the Employer a notice, which indicates the Employer's participation in the E-Verify program. DHS also agrees to provide to the Employer anti-discrimination notices issued by the Office of Special Counsel for Immigration-Related Unfair Employment Practices (OSC), Civil Rights Division, U.S. Department of Justice.
- 5. DHS agrees to issue the Employer a user identification number and password that permits the Employer to verify information provided by employees with DHS's database.
- 6. DHS agrees to safeguard the information provided to DHS by the Employer, and to limit access to such information to individuals responsible for the verification of employees' employment eligibility and for evaluation of the E-Verify program, or to such other persons or entities as may be authorized by applicable law. Information will be used only to verify the accuracy of Social Security Numbers and employment eligibility, to enforce the Immigration and

Nationality Act (INA) and Federal criminal laws, and to administer Federal contracting requirements.

- 7. DHS agrees to provide a means of automated verification that is designed (in conjunction with SSA verification procedures) to provide confirmation or tentative nonconfirmation of employees' employment eligibility within 3 Federal Government work days of the initial inquiry.
- 8. DHS agrees to provide a means of secondary verification (including updating DHS records as may be necessary) for employees who contest DHS tentative nonconfirmations and photo non-match tentative nonconfirmations that is designed to provide final confirmation or nonconfirmation of the employees' employment eligibility within 10 Federal Government work days of the date of referral to DHS, unless DHS determines that more than 10 days may be necessary. In such cases, DHS will provide additional verification instructions.

C. RESPONSIBILITIES OF THE EMPLOYER

- 1. The Employer agrees to display the notices supplied by DHS in a prominent place that is clearly visible to prospective employees and all employees who are to be verified through the system.
- 2. The Employer agrees to provide to the SSA and DHS the names, titles, addresses, and telephone numbers of the Employer representatives to be contacted regarding E-Verify.
- 3. The Employer agrees to become familiar with and comply with the most recent version of the E-Verify User Manual.
- 4. The Employer agrees that any Employer Representative who will perform employment verification queries will complete the E-Verify Tutorial before that individual initiates any queries.
 - A. The Employer agrees that all Employer representatives will take the refresher tutorials initiated by the E-Verify program as a condition of continued use of E-Verify.
 - B. Failure to complete a refresher tutorial will prevent the Employer from continued use of the program.
- 5. The Employer agrees to comply with current Form I-9 procedures, with two exceptions:
- If an employee presents a "List B" identity document, the Employer agrees to only accept "List B" documents that
- contain a photo. (List B documents identified in 8 C.F.R. § 274a.2(b)(1)(B)) can be presented during the Form I-9
- process to establish identity.) If an employee objects to the photo requirement for religious reasons, the Employer
 - should contact E-Verify at 888-464-4218.
 - If an employee presents a DHS Form I-551 (Permanent Resident Card) or Form I-766 (Employment Authorization Document) to complete the Form I-9, the Employer agrees to make a photocopy of the document and to retain the photocopy with the employee's Form I-9. The photocopy must be of sufficient quality to allow for verification of the photo



and written information. The employer will use the photocopy to verify the photo and to assist DHS with its review of photo non-matches that are contested by employees. Note that employees retain the right to present any List A, or List B and List C, documentation to complete the Form I-9. DHS may in the future designate other documents that activate the photo screening tool.

- 6. The Employer understands that participation in E-Verify does not exempt the Employer from the responsibility to complete, retain, and make available for inspection Forms I-9 that relate to its employees, or from other requirements of applicable regulations or laws, including the obligation to comply with the antidiscrimination requirements of section 274B of the INA with respect to Form I-9 procedures, except for the following modified requirements applicable by reason of the Employer's participation in E-Verify: (1) identity documents must have photos, as described in paragraph 5 above; (2) a rebuttable presumption is established that the Employer has not violated section 274A(a)(1)(A) of the Immigration and Nationality Act (INA) with respect to the hiring of any individual if it obtains confirmation of the identity and employment eligibility of the individual in good faith compliance with the terms and conditions of E-Verify; (3) the Employer must notify DHS if it continues to employ any employee after receiving a final nonconfirmation, and is subject to a civil money penalty between \$550 and \$1,100 for each failure to notify DHS of continued employment following a final nonconfirmation: (4) the Employer is subject to a rebuttable presumption that it has knowingly employed an unauthorized alien in violation of section 274A(a)(1)(A) if the Employer continues to employ an employee after receiving a final nonconfirmation; and (5) no person or entity participating in E-Verify is civilly or criminally liable under any law for any action taken in good faith based on information provided through the confirmation system. DHS reserves the right to conduct Form I-9 and E-Verify system compliance inspections during the course of E-Verify, as well as to conduct any other enforcement activity authorized by law.
- 7. The Employer agrees to initiate E-Verify verification procedures for new employees within 3 Employer business days after each employee has been hired (but after the Form I-9 has been completed), and to complete as many (but only as many) steps of the E-Verify process as are necessary according to the E-Verify User Manual, or in the case of Federal contractors with the FAR E-Verify clause, the E-Verify User Manual for Federal Contractors. The Employer is prohibited from initiating verification procedures before the employee has been hired and the Form I-9 completed. If the automated system to be queried is temporarily unavailable, the 3-day time period is extended until it is again operational in order to accommodate the Employer's attempting, in good faith, to make inquiries during the period of unavailability. Employers may initiate verification by notating the Form I-9 in circumstances where the employee has applied for a Social Security Number (SSN) from the SSA and is waiting to receive the SSN, provided that the Employer performs an E-Verify employment verification query using the employee's SSN as soon as the SSN becomes available.
- 8. The Employer agrees not to use E-Verify procedures for pre-employment screening of job applicants, in support of any unlawful employment practice, or for any other use not authorized by this MOU. Employers must use E-Verify for all new employees, unless an Employer is a Federal contractor that qualifies for the exceptions described in Article II.D.1.c. Except as provided in Article II.D, the Employer will not verify selectively and will not verify employees hired before the effective date of this MOU. The Employer understands that if the Employer



uses the E-Verify system for any purpose other than as authorized by this MOU, the Employer may be subject to appropriate legal action and termination of its access to SSA and DHS information pursuant to this MOU.

- 9. The Employer agrees to follow appropriate procedures (see Article III. below) regarding tentative nonconfirmations, including notifying employees in private of the finding and providing them written notice of the findings, providing written referral instructions to employees, allowing employees to contest the finding, and not taking adverse action against employees if they choose to contest the finding. Further, when employees contest a tentative nonconfirmation based upon a photo non-match, the Employer is required to take affirmative steps (see Article III.B. below) to contact DHS with information necessary to resolve the challenge.
- 10. The Employer agrees not to take any adverse action against an employee based upon the employee's perceived employment eligibility status while SSA or DHS is processing the verification request unless the Employer obtains knowledge (as defined in 8 C.F.R. § 274a.1(I)) that the employee is not work authorized. The Employer understands that an initial inability of the SSA or DHS automated verification system to verify work authorization, a tentative nonconfirmation, a case in continuance (indicating the need for additional time for the government to resolve a case), or the finding of a photo non-match, does not establish, and should not be interpreted as evidence, that the employee is not work authorized. In any of the cases listed above, the employee must be provided a full and fair opportunity to contest the finding, and if he or she does so, the employee may not be terminated or suffer any adverse employment consequences based upon the employee's perceived employment eligibility status (including denying, reducing, or extending work hours, delaying or preventing training, requiring an employee to work in poorer conditions, refusing to assign the employee to a Federal contract or other assignment, or otherwise subjecting an employee to any assumption that he or she is unauthorized to work) until and unless secondary verification by SSA or DHS has been completed and a final nonconfirmation has been issued. If the employee does not choose to contest a tentative nonconfirmation or a photo non-match or if a secondary verification is completed and a final nonconfirmation is issued, then the Employer can find the employee is not work authorized and terminate the employee's employment. Employers or employees with questions about a final nonconfirmation may call E-Verify at 1-888-464-4218 or OSC at 1-800-255-8155 or 1-800-237-2515 (TDD).
- 11. The Employer agrees to comply with Title VII of the Civil Rights Act of 1964 and section 274B of the INA, as applicable, by not discriminating unlawfully against any individual in hiring, firing, or recruitment or referral practices because of his or her national origin or, in the case of a protected individual as defined in section 274B(a)(3) of the INA, because of his or her citizenship status. The Employer understands that such illegal practices can include selective verification or use of E-Verify except as provided in part D below, or discharging or refusing to hire employees because they appear or sound "foreign" or have received tentative nonconfirmations. The Employer further understands that any violation of the unfair immigration-related employment practices provisions in section 274B of the INA could subject the Employer to civil penalties, back pay awards, and other sanctions, and violations of Title VII could subject the Employer to back pay awards, compensatory and punitive damages. Violations of either section 274B of the INA or Title VII may also lead to the termination of its participation in E-

Verify. If the Employer has any questions relating to the anti-discrimination provision, it should contact OSC at 1-800-255-8155 or 1-800-237-2515 (TDD).

- 12. The Employer agrees to record the case verification number on the employee's Form I-9 or to print the screen containing the case verification number and attach it to the employee's Form I-9.
- 13. The Employer agrees that it will use the information it receives from SSA or DHS pursuant to E-Verify and this MOU only to confirm the employment eligibility of employees as authorized by this MOU. The Employer agrees that it will safeguard this information, and means of access to it (such as PINS and passwords) to ensure that it is not used for any other purpose and as necessary to protect its confidentiality, including ensuring that it is not disseminated to any person other than employees of the Employer who are authorized to perform the Employer's responsibilities under this MOU, except for such dissemination as may be authorized in advance by SSA or DHS for legitimate purposes.
- 14. The Employer acknowledges that the information which it receives from SSA is governed by the Privacy Act (5 U.S.C. § 552a(i)(1) and (3)) and the Social Security Act (42 U.S.C. 1306(a)), and that any person who obtains this information under false pretenses or uses it for any purpose other than as provided for in this MOU may be subject to criminal penalties.
- 15. The Employer agrees to cooperate with DHS and SSA in their compliance monitoring and evaluation of E-Verify, including by permitting DHS and SSA, upon reasonable notice, to review Forms I-9 and other employment records and to interview it and its employees regarding the Employer's use of E-Verify, and to respond in a timely and accurate manner to DHS requests for information relating to their participation in E-Verify.

D. RESPONSIBILITIES OF FEDERAL CONTRACTORS WITH THE FAR E-VERIFY CLAUSE

- 1. The Employer understands that if it is a subject to the employment verification terms in Subpart 22.18 of the FAR, it must verify the employment eligibility of any existing employee assigned to the contract and all new hires, as discussed in the Supplemental Guide for Federal Contractors. Once an employee has been verified through E-Verify by the Employer, the Employer may not reverify the employee through E-Verify.
- a. Federal contractors with the FAR E-Verify clause agree to become familiar with and comply with the most recent versions of the E-Verify User Manual for Federal Contractors and the E-Verify Supplemental Guide for Federal Contractors.
- b. Federal contractors with the FAR E-Verify clause agree to complete a tutorial for Federal contractors with the FAR E-Verify clause.
- c. Federal contractors with the FAR E-Verify clause not enrolled at the time of contract award: An Employer that is not enrolled in E-Verify at the time of a contract award must enroll as a Federal contractor with the FAR E-Verify clause in E-Verify within 30 calendar days of contract award and, within 90 days of enrollment, begin to use E-Verify to initiate verification of employment eligibility of new hires of the Employer who are working in the United States,



whether or not assigned to the contract. Once the Employer begins verifying new hires, such verification of new hires must be initiated within 3 business days after the date of hire. Once enrolled in E-Verify as a Federal contractor with the FAR E-Verify clause, the Employer must initiate verification of employees assigned to the contract within 90 calendar days from the time of enrollment in the system and after the date and selecting which employees will be verified in E-Verify or within 30 days of an employee's assignment to the contract, whichever date is later.

- d. Employers that are already enrolled in E-Verify at the time of a contract award but are not enrolled in the system as a Federal contractor with the FAR E-Verify clause: Employers enrolled in E-Verify for 90 days or more at the time of a contract award must use E-Verify to initiate verification of employment eligibility for new hires of the Employer who are working in the United States, whether or not assigned to the contract, within 3 business days after the date of hire. Employers enrolled in E-Verify as other than a Federal contractor with the FAR E-Verify clause, must update E-Verify to indicate that they are a Federal contractor with the FAR E-Verify clause within 30 days after assignment to the contract. If the Employer is enrolled in E-Verify for 90 calendar days or less at the time of contract award, the Employer must, within 90 days of enrollment, begin to use E-Verify to initiate verification of new hires of the contractor who are working in the United States, whether or not assigned to the contract. Such verification of new hires must be initiated within 3 business days after the date of hire. An Employer enrolled as a Federal contractor with the FAR E-Verify clause in E-Verify must initiate verification of each employee assigned to the contract within 90 calendar days after date of contract award or within 30 days after assignment to the contract, whichever is later.
- e. Institutions of higher education, State, local and tribal governments and sureties: Federal contractors with the FAR E-Verify clause that are institutions of higher education (as defined at 20 U.S.C. 1001(a)), State or local governments, governments of Federally recognized Indian tribes, or sureties performing under a takeover agreement entered into with a Federal agency pursuant to a performance bond may choose to only verify new and existing employees assigned to the Federal contract. Such Federal contractors with the FAR E-Verify clause may, however, elect to verify all new hires, and/or all existing employees hired after November 6, 1986. The provisions of Article II.D, paragraphs 1.a and 1.b of this MOU providing timeframes for initiating employment verification of employees assigned to a contract apply to such institutions of higher education, State, local and tribal governments, and sureties.
- f. Verification of all employees: Upon enrollment, Employers who are Federal contractors with the FAR E-Verify clause may elect to verify employment eligibility of all existing employees working in the United States who were hired after November 6, 1986, instead of verifying only new employees and those existing employees assigned to a covered Federal contract. After enrollment, Employers must elect to do so only in the manner designated by DHS and initiate E-Verify verification of all existing employees within 180 days after the election.
- g. Form I-9 procedures for existing employees of Federal contractors with the FAR E-Verify clause: Federal contractors with the FAR E-Verify clause may choose to complete new Forms I-9 for all existing employees other than those that are completely exempt from this process. Federal contractors with the FAR E-Verify clause may also update previously completed Forms I-9 to initiate E-Verify verification of existing employees who are not completely exempt as long as that Form I-9 is complete (including the SSN), complies with

Article II.C.5, the employee's work authorization has not expired, and the Employer has reviewed the information reflected in the Form I-9 either in person or in communications with the employee to ensure that the employee's stated basis in section 1 of the Form I-9 for work authorization has not changed (including, but not limited to, a lawful permanent resident alien having become a naturalized U.S. citizen). If the Employer is unable to determine that the Form I-9 complies with Article II.C.5, if the employee's basis for work authorization as attested in section 1 has expired or changed, or if the Form I-9 contains no SSN or is otherwise incomplete, the Employer shall complete a new I-9 consistent with Article II.C.5, or update the previous I-9 to provide the necessary information. If section 1 of the Form I-9 is otherwise valid and up-todate and the form otherwise complies with Article II.C.5, but reflects documentation (such as a U.S. passport or Form I-551) that expired subsequent to completion of the Form I-9, the Employer shall not require the production of additional documentation, or use the photo screening tool described in Article II.C.5, subject to any additional or superseding instructions that may be provided on this subject in the Supplemental Guide for Federal Contractors. Nothing in this section shall be construed to require a second verification using E-Verify of any assigned employee who has previously been verified as a newly hired employee under this MOU, or to authorize verification of any existing employee by any Employer that is not a Federal contractor with the FAR E-Verify clause.

2. The Employer understands that if it is a Federal contractor with the FAR E-Verify clause, its compliance with this MOU is a performance requirement under the terms of the Federal contract or subcontract, and the Employer consents to the release of information relating to compliance with its verification responsibilities under this MOU to contracting officers or other officials authorized to review the Employer's compliance with Federal contracting requirements.

ARTICLE III

REFERRAL OF INDIVIDUALS TO SSA AND DHS

A. REFERRAL TO SSA

- 1. If the Employer receives a tentative nonconfirmation issued by SSA, the Employer must print the notice as directed by the E-Verify system and provide it to the employee so that the employee may determine whether he or she will contest the tentative nonconfirmation. The Employer must review the tentative nonconfirmation with the employee in private.
- 2. The Employer will refer employees to SSA field offices only as directed by the automated system based on a tentative nonconfirmation, and only after the Employer records the case verification number, reviews the input to detect any transaction errors, and determines that the employee contests the tentative nonconfirmation. The Employer will transmit the Social Security Number to SSA for verification again if this review indicates a need to do so. The Employer will determine whether the employee contests the tentative nonconfirmation as soon as possible after the Employer receives it.
- 3. If the employee contests an SSA tentative nonconfirmation, the Employer will provide the employee with a system-generated referral letter and instruct the employee to visit an SSA office within 8 Federal Government work days. SSA will electronically transmit the result of the referral to the Employer within 10 Federal Government work days of the referral unless it

determines that more than 10 days is necessary. The Employer agrees to check the E-Verify system regularly for case updates.

4. The Employer agrees not to ask the employee to obtain a printout from the Social Security Number database (the Numident) or other written verification of the Social Security Number from the SSA.

B. REFERRAL TO DHS

- 1. If the Employer receives a tentative nonconfirmation issued by DHS, the Employer must print the tentative nonconfirmation notice as directed by the E-Verify system and provide it to the employee so that the employee may determine whether he or she will contest the tentative nonconfirmation. The Employer must review the tentative nonconfirmation with the employee in private.
- 2. If the Employer finds a photo non-match for an employee who provides a document for which the automated system has transmitted a photo, the employer must print the photo non-match tentative nonconfirmation notice as directed by the automated system and provide it to the employee so that the employee may determine whether he or she will contest the finding. The Employer must review the tentative nonconfirmation with the employee in private.
- 3. The Employer agrees to refer individuals to DHS only when the employee chooses to contest a tentative nonconfirmation received from DHS automated verification process or when the Employer issues a tentative nonconfirmation based upon a photo non-match. The Employer will determine whether the employee contests the tentative nonconfirmation as soon as possible after the Employer receives it.
- 4. If the employee contests a tentative nonconfirmation issued by DHS, the Employer will provide the employee with a referral letter and instruct the employee to contact DHS through its toll-free hotline (as found on the referral letter) within 8 Federal Government work days.
- 5. If the employee contests a tentative nonconfirmation based upon a photo non-match, the Employer will provide the employee with a referral letter to DHS. DHS will electronically transmit the result of the referral to the Employer within 10 Federal Government work days of the referral unless it determines that more than 10 days is necessary. The Employer agrees to check the E-Verify system regularly for case updates.
- 6. The Employer agrees that if an employee contests a tentative nonconfirmation based upon a photo non-match, the Employer will send a copy of the employee's Form I-551 or Form I-766 to DHS for review by:
 - Scanning and uploading the document, or
 - Sending a photocopy of the document by an express mail account (paid for at employer expense).
- 7. If the Employer determines that there is a photo non-match when comparing the photocopied List B document described in Article II.C.5 with the image generated in E-Verify, the Employer must forward the employee's documentation to DHS using one of the means described in the preceding paragraph, and allow DHS to resolve the case.

ARTICLE IV

SERVICE PROVISIONS

SSA and DHS will not charge the Employer for verification services performed under this MOU. The Employer is responsible for providing equipment needed to make inquiries. To access E-Verify, an Employer will need a personal computer with Internet access.

ARTICLE V

PARTIES

A. This MOU is effective upon the signature of all parties, and shall continue in effect for as long as the SSA and DHS conduct the E-Verify program unless modified in writing by the mutual consent of all parties, or terminated by any party upon 30 days prior written notice to the others. Any and all system enhancements to the E-Verify program by DHS or SSA, including but not limited to the E-Verify checking against additional data sources and instituting new verification procedures, will be covered under this MOU and will not cause the need for a supplemental MOU that outlines these changes. DHS agrees to train employers on all changes made to E-Verify through the use of mandatory refresher tutorials and updates to the E-Verify User Manual, the E-Verify User Manual for Federal Contractors or the E-Verify Supplemental Guide for Federal Contractors. Even without changes to E-Verify, DHS reserves the right to require employers to take mandatory refresher tutorials. An Employer that is a Federal contractor with the FAR E-Verify clause may terminate this MOU when the Federal contract that requires its participation in E-Verify is terminated or completed. In such a circumstance, the Federal contractor with the FAR E-Verify clause must provide written notice to DHS. If an Employer that is a Federal contractor with the FAR E-Verify clause fails to provide such notice, that Employer will remain a participant in the E-Verify program, will remain bound by the terms of this MOU that apply to participants that are not Federal contractors with the FAR E-Verify clause, and will be required to use the E-Verify procedures to verify the employment eligibility of all newly hired employees.

- B. Notwithstanding Article V, part A of this MOU, DHS may terminate this MOU if deemed necessary because of the requirements of law or policy, or upon a determination by SSA or DHS that there has been a breach of system integrity or security by the Employer, or a failure on the part of the Employer to comply with established procedures or legal requirements. The Employer understands that if it is a Federal contractor with the FAR E-Verify clause, termination of this MOU by any party for any reason may negatively affect its performance of its contractual responsibilities.
- C. Some or all SSA and DHS responsibilities under this MOU may be performed by contractor(s), and SSA and DHS may adjust verification responsibilities between each other as they may determine necessary. By separate agreement with DHS, SSA has agreed to perform its responsibilities as described in this MOU.



- D. Nothing in this MOU is intended, or should be construed, to create any right or benefit, substantive or procedural, enforceable at law by any third party against the United States, its agencies, officers, or employees, or against the Employer, its agents, officers, or employees.
- E. Each party shall be solely responsible for defending any claim or action against it arising out of or related to E-Verify or this MOU, whether civil or criminal, and for any liability wherefrom, including (but not limited to) any dispute between the Employer and any other person or entity regarding the applicability of Section 403(d) of IIRIRA to any action taken or allegedly taken by the Employer.
- F. The Employer understands that the fact of its participation in E-Verify is not confidential information and may be disclosed as authorized or required by law and DHS or SSA policy, including but not limited to, Congressional oversight, E-Verify publicity and media inquiries, determinations of compliance with Federal contractual requirements, and responses to inquiries under the Freedom of Information Act (FOIA).
- G. The foregoing constitutes the full agreement on this subject between DHS and the Employer.
- H. The individuals whose signatures appear below represent that they are authorized to enter into this MOU on behalf of the Employer and DHS respectively.



To be accepted as a participant in E-Verify, you should only sign the Employer's Section of the signature page. If you have any questions, contact E-Verify at 888-464-4218.

Employer Research Data Serv	vices, Inc.				
Walter Klages					
Name (Please Type or Print)		Title			
Floatronically Signed		10/22/2010			
Electronically Signed Signature		Date			
Department of Homeland Secur	ity – Verification Div	vision			
USCIS Verification Division					
Name (Please Type or Print)		Title			
Electronically Signed		10/22/2010			
Signature		Date			
Inform	nation Required to	or the E-Verify Program			
IIIIOIII	nation Nequired to	of the L-verify Frogram			
Information relating to you	ır Company:				
Company Name	Research Data Servic	es, Inc.			
		·			
Company Facility Address	∖ ·3825 Henderson Boul	levard			
Company Facility Address					
	Suite 300				
	Tampa, FL 33629				
Company Alternate					
Address:					
County or Parish:	HILLSBOROUGH				
Employer Identification					
Number:	592042612				



North American Industry Classification Systems Code:	541
Administrator:	
Number of Employees:	10 to 19
Number of Sites Verified for:	1
	nan 1 site? If yes, please provide the number of sites verified for
in each State:	
• FLORIDA	1 site(s)

Information relating to the Program Administrator(s) for your Company on policy questions or operational problems:

Name: Walter J Klages

Telephone Number: (813) 254 - 2975 Fax Number: (813) 254 - 2986

E-mail Address: research@klagesgroup.com

Name: Anne E Wittine

Telephone Number: (813) 254 - 2975 Fax Number: (813) 254 - 2986

E-mail Address: research@klagesgroup.com



Attachment 7: Vendor Substitute W – 9 Request for Taxpayer Identification Number and Certification

In accordance with the Internal Revenue Service regulations, Collier County is required to collect the following information for tax reporting purposes from individuals and companies who do business with the County (including social security numbers if used by the individual or company for tax reporting purposes). Florida Statute 119.071(5) require that the county notify you in writing of the reason for collecting this information, which will be used for no other purpose than herein stated. Please complete all information that applies to your business and return with your quote or proposal.

	General Information (provide all information)					
	Taxpayer Name Research Data Services, Inc. (as shown on income tax return) Business Name Same					
	(if different from taxpayer name) Address _777 S. Harbour Island Blvd., Suite 260	City <u>Tampa</u>				
	State Florida	Zip <u>33602</u>	A. M. Martin			
	Telephone <u>(813) 254-2975</u> FAX <u>(813) 223-2</u>	986 Emai	I_WJKlages@ResearchDataLLC.com			
	Order Information	Remit / Payment Inf	ormation			
	Address Same	Address Same	t Information State Zip Partnership illity Company the tax classification inded Entity, C = Corporation, P = Partnership) introduced interpretation in this form is correct to my knowledge. Date Pate			
	City State Zip	City State Zip				
	FAX	FAX				
	Email					
2.	Company Status (check only one) Individual / Sole Proprietor X Corporati	ion	Partnershin			
	Tax Exempt (Federal income tax-exempt entity under Internal Revenue Service guidelines IRC 501 (c) 3)					
3.	Taxpayer Identification Number (for tax reporting	g purposes only)				
	Federal Tax Identification Number (TIN)59-2042612	2				
	(Vendors who do not have a TIN, will be required to pro	ovide a social security r	number prior to an award of the contract.)			
l .	. Sign and Date Form Certification: Under penalties of perjusy receifly that the information shown on this form is correct to my knowledge.					
	Signature		Date February 1, 2016			
	Title President/CEO	_	Phone Number <u>(813) 254-2975</u>			



Attachment 8: Insurance and Bonding Requirements

Ins	surance / Bond Type	Required Limits				
1.		Statutory Limits of Florida Statutes, Chapter Statutory Limits and Requirements	440 and all Fe	deral Government		
2.		\$100,000 single limit per occurrence				
3.	□ Commercial General Liability (Occurrence Form)	Bodily Injury and Property Damage				
	patterned after the current ISO form	\$1,000,000 single limit per occurrence, \$2,00 Liability and Property Damage Liability. T Operations; Independent Contractors; Produand Contractual Liability	his shall inclu	de Premises and		
4.		To the maximum extent permitted by Florida law, the Contractor/Vendor/Consultant shall indemnify and hold harmless Collier County, its officers and employees from any and all liabilities, damages, losses and costs, including, but not limited to, reasonable attorneys' fees and paralegals' fees, to the extent caused by the negligence, recklessness, or intentionally wrongful conduct of the Contractor/Vendor/Consultant or anyone employed or utilized by the Contractor/Vendor/Consultant in the performance of this Agreement. This indemnification obligation shall not be construed to negate, abridge or reduce any other rights or remedies which otherwise may be available to an indemnified party or person described in this paragraph. This section does not pertain to any incident arising from the sole negligence of Collier County.				
4.		\$ 500,000 Each Occurrence; Bodily Injury & P Owned/Non-owned/Hired; Automobile Include		ge,		
5.	Other insurance as	☐ Watercraft	\$	_ Per Occurrence		
	noted:	United States Longshoreman's and Harborworker's Act coverage shall be maintained where applicable to the completion of the work.				
			\$	_ Per Occurrence		
		☐ Maritime Coverage (Jones Act) shall be me the completion of the work.	aintained wher	re applicable to		
			dge or reduce any other rights or remedies which otherwis to an indemnified party or person described in this paragra does not pertain to any incident arising from the sole neglical unity. ach Occurrence; Bodily Injury & Property Damage, owned/Hired; Automobile Included ft	_ Per Occurrence		
		andor tine rigidement.	\$	_ Per Occurrence		
		☐ Pollution	\$	_ Per Occurrence		
		 Professional Liability \$ 500,000 each claim and in the agg \$1,000,000 each claim and in the agg \$2,000,000 each claim and in the agg 	regate regate	Per Occurrence		
		☐ Professional Liability	\$	_ per claim and in		
		 \$1,000,000 per claim and in the aggre 	egate	the aggregate		

- \$1,000,000 per claim and in the aggregate \$2,000,000 per claim and in the aggregate

			☐ Valuable Papers	Insurance		\$	Per C	ccurrence	
			☐ Employee Disho Including Emplo Payee endorsem	yee Theft, Fun-		\$ r Fraud, I		Occurrence Joint Loss	
6.	☐ Bid bond		cashiers' check or a County Clerk, or pro checks shall be made Commissioners on a	ubmitted with proposal response in the form of certified funds, sheck or an irrevocable letter of credit, a cash bond posted with the erk, or proposal bond in a sum equal to 5% of the cost proposal. All all be made payable to the Collier County Board of County oners on a bank or trust company located in the State of Florida and the Federal Deposit Insurance Corporation.					
7.						1% of the n award. rety ptable to r as to cial size ed policy Guide,			
8.	☑ Vendor shall ensure that all subcontractors comply with the same insurance requirements that he is required to meet. The same Vendor shall provide County with certificates of insurance meeting the required insurance provisions.								
9.		ounty must be n ility where requi	amed as " ADDITION red.	IAL INSURED" (on the Insur	ance Cert	ificate for C	commercial	
10.	The Certificate Holder shall be named as Collier County Board of County Commissioners, OR, Board of County Commissioners in Collier County, OR Collier County Government, OR Collier County. The Certificates of Insurance must state the Contract Number, or Project Number, or specific Project description, or must read: For any and all work performed on behalf of Collier County.								
	⊠ Thirty (3 A 1/6/2016	0) Days Cancel	lation Notice require	ed.					
			Vendor's quirements of these sof this solicitation.	Insurance State pecifications and		vidence of	insurability	may be required	
Nar	me of Firm	Research Data	Services Inc.	Ī	Date Fe	bruary 1,	2016		
	ndor nature	1							
Prir	nt Name	Walter J. Klage	s, Ph.D.						
	urance ency	Carlock & Asso	ociates Insurance NC	(Liability and W	orkers Con	np) / Lovin	ger Insurar	nce (Auto)	
_	ent Name	Steve Poole / L	ynne Lovinger	Telephon	e Number	(239) 54	9-0221 / (8	13) 258-8909	



Dynamic Data for Decision Making!

Research Data Services, Inc.

777 South Harbour Island Boulevard Suite 260 Tampa, Florida 33602

> Phone: (813) 254-2975 Fax: (813) 223-2986

www.ResearchDataLLC.com WJKlages@ResearchDataLLC.com Collier County Purchasing Department Selection Committee Individual Score and Rank Form

RFP #: 16-6563

Title: TDC Research Services

Step 1: Selection committee members will independently review and assign points/score each proposal based on the evaluation criteria stated below using the Individual Selection Committee Score and Rank Form - Step 1; and prepare comments for discussion at the next meeting.

Step 2: Upon direction by the Procurement professional, the individual selection committee member should review the individual vendor total scores and take into account all other information including: the proposals, recommendations, County evaluations and any other information discussed in the public meeting(s). Rank order each of the vendor's proposals from 1 (being the highest ranked proposal), 2 being the next highest ranked vendor's proposal and so forth based on information obtained.

Name	Rusiness	Tab III, Cost of Services (Points 15)	Tab IV, Experience (Points 20)	of Team (Points	Tab VI, References – 5 Completed and Returned (Points 10)	Preference	Step 1:Total Individual Scoring (Criteria points should be added together)	Step 2: Individual Rank Order (Do not complete until directed by the Procurement professional)
Downs & St. Germain Research		14.7		15.4	10	0	40.1	
Research Data Services, Inc.		15	•	20	9.9	0	44.9	

I have identified my individual scoring and rank for the firms who have submitted proposals for this solicitation on the Selection Committee Individual Score and Rank Form. Sign and date the form below.

Signature	
Signature	

AGREEMENT #16-6563

for

Tourism Research Services

THIS AGREEMENT, made and entered into on this day of	2016, by
and between Research Data Services, Inc., authorized to do business in the S	tate of Florida,
whose business address is 777 South Harbour Island blvd, Suite 260, Tampa,	FL 33602, (the
"Contractor") and Collier County, a political subdivision of the State of	f Florida, (the
"County"):	8.

WITNESSETH:

1. <u>CONTRACT TERM.</u> The contract shall be for a one (1) year period, commencing on May 1, 2016 and terminating one (1) year from that date.

The County may, at its discretion and with the consent of the Contractor, renew the Agreement under all of the terms and conditions contained in this Agreement for four (4) additional one (1) year periods. The County shall give The Contractor written notice of the County's intention to renew the Agreement term not less than ten (10) days prior to the end of the Agreement term then in effect.

The County Manager, or his designee, may, at his discretion, extend the Agreement under all of the terms and conditions contained in this Agreement for up to 180 days. The County Manager, or his designee, shall give The Contractor written notice of the County's intention to extend the Agreement term not less than ten (10) days prior to the end of the Agreement term then in effect.

- 2. STATEMENT OF WORK. The Contractor shall provide Tourism Research Services in accordance with the terms and conditions of RFP #16-6563, Exhibit A Scope of Services, and the Contractor's proposal referred to herein and made an integral part of this agreement. This Agreement contains the entire understanding between the parties and any modifications to this Agreement shall be mutually agreed upon in writing by the Parties, in compliance with the County Procurement Ordinance, as amended, and Procurement Procedures in effect at the time such services are authorized.
- 3. <u>COMPENSATION.</u> The County shall pay the Contractor for the performance of this Agreement an estimated annual amount of one hundred twenty thousand eight hundred dollars (\$120,800.00), based on the prices set forth in the Contractor's proposal, subject to Change Orders as approved in advance by the County. Payments shall be made to the Contractor in the form of monthly lump sum payments (lump sum is further defined in Section 3.1 Price Methodology) in the amount of ten thousand sixty-six dollars and sixty-seven cents (\$10,066.67) plus travel and Page 1 of 16



March 28, 2016 New Business 7-c 142 of 156

reimbursables (out-of-pocket expenses) not-to-exceed six thousand dollars (\$6,000.00) per year. Payment will be made upon receipt of a proper invoice and in compliance with Chapter 218 Fla. Stats., otherwise known as the "Local Government Prompt Payment Act".

- 3.1 Price Methodology. Lump Sum (Fixed Price): a firm fixed total price offering for a project; the risks are transferred from the County to the Contractor; and, as a business practice there are no hourly or material invoices presented, rather, the Contractor must perform to the satisfaction of the County's project manager before payment for the fixed price contract is authorized.
 - 3.2 The County reserves the right to deduct portions of the (monthly) invoiced (task) amount for the following: Tasks not completed within the expressed time frame, including required deliverables, incomplete and/or deficient documents, failure to comply with local, state and/or federal requirements and/or codes and ordinances applicable to Contractor's performance of the work as related to the project. This list is not deemed to be all-inclusive, and the County reserves the right to make sole determination regarding deductions. After notification of deficiency, if the Contractor fails to correct the deficiency within the specified timeframe, these funds would be forfeited by the Contractor. The County may also deduct or charge the Contractor for services and/or items necessary to correct the deficiencies directly related to the Contractor's non-performance whether or not the County obtained substitute performance.
 - 3.3 Payments will be made for services furnished, delivered, and accepted, upon receipt and approval of invoices submitted on the date of services or within six (6) months after completion of contract. Any untimely submission of invoices beyond the specified deadline period is subject to non-payment under the legal doctrine of "laches" as untimely submitted. Time shall be deemed of the essence with respect to the timely submission of invoices under this agreement.
 - 3.4 Travel and Reimbursable Expenses. Travel and Reimbursable Expenses (out of pocket expenses) must be approved in advance in writing by the County. Travel expenses shall be reimbursed at actual cost in accordance with Collier County Resolution No. 2006-40 "Travel Expenses for Persons Conducting Official Tourism Business" and §125.0104, Fla. Stat. Contractor's travel time will be included in the monthly service fee.

Reimbursable items (out of pocket expenses) other than travel expenses shall be include but not limited to; telephone long-distance charges, fax charges, parking fees, reasonable commercial transportation, reasonable gratuities, taxes, tolls, entertainment, location rental and catering for events, photocopying charges, shipping and postage. Reimbursable items will be paid only after Contractor has provided all

receipts. Contractor shall be responsible for all other costs and expenses associated with activities and solicitations undertaken pursuant to this Agreement.

- 4. <u>SALES TAX.</u> Contractor shall pay all sales, consumer, use and other similar taxes associated with the Work or portions thereof, which are applicable during the performance of the Work. Collier County, Florida as a political subdivision of the State of Florida, is exempt from the payment of Florida sales tax to its vendors under Chapter 212, Florida Statutes, Certificate of Exemption # 85-8015966531C-2.
- 5. **NOTICES.** All notices from the County to the Contractor shall be deemed duly served if mailed or faxed to the Contractor at the following Address:

Research Data Services, Inc. Attn: Walter J. Klages, Ph.D., President 777 South Harbour Blvd., Suite 260 Tampa, FL 33602 Telephone: 813-254-2975

Facsimile: 813-223-2986 Email: WJKlages@KlagesGroup.com

All Notices from the Contractor to the County shall be deemed duly served if mailed or faxed to the County to:

Collier County Government Center Procurement Services Division 3327 Tamiami Trail, East Naples, Florida 34112

Attention: Joanne Markiewicz, Director, Procurement Services Division

Telephone: 239-252-8407 Facsimile: 239-252-6480

The Contractor and the County may change the above mailing address at any time upon giving the other party written notification. All notices under this Agreement must be in writing.

- 6. **NO PARTNERSHIP**. Nothing herein contained shall create or be construed as creating a partnership between the County and the Contractor or to constitute the Contractor as an agent of the County.
- 7. <u>PERMITS: LICENSES: TAXES</u>. In compliance with Section 218.80, F.S., all permits necessary for the prosecution of the Work shall be obtained by the Contractor. The County will not be obligated to pay for any permits obtained by Subcontractors.

March 28, 2016 New Business 7-c

Payment for all such permits issued by the County shall be processed internally by the County. All non-County permits necessary for the prosecution of the Work shall be procured and paid for by the Contractor. The Contractor shall also be solely responsible for payment of any and all taxes levied on the Contractor. In addition, the Contractor shall comply with all rules, regulations and laws of Collier County, the State of Florida, or the U. S. Government now in force or hereafter adopted. The Contractor agrees to comply with all laws governing the responsibility of an employer with respect to persons employed by the Contractor.

- 8. NO IMPROPER USE. The Contractor will not use, nor suffer or permit any person to use in any manner whatsoever, County facilities for any improper, immoral or offensive purpose, or for any purpose in violation of any federal, state, county or municipal ordinance, rule, order or regulation, or of any governmental rule or regulation now in effect or hereafter enacted or adopted. In the event of such violation by the Contractor or if the County or its authorized representative shall deem any conduct on the part of the Contractor to be objectionable or improper, the County shall have the right to suspend the contract of the Contractor. Should the Contractor fail to correct any such violation, conduct, or practice to the satisfaction of the County within twenty-four (24) hours after receiving notice of such violation, conduct, or practice, such suspension to continue until the violation is cured. The Contractor further agrees not to commence operation during the suspension period until the violation has been corrected to the satisfaction of the County.
- 9. <u>TERMINATION</u>. Should the Contractor be found to have failed to perform his services in a manner satisfactory to the County as per this Agreement, the County may terminate said agreement for cause; further the County may terminate this Agreement for convenience with a thirty (30) day written notice. The County shall be sole judge of non-performance.

In the event that the County terminates this Agreement, Contractor's recovery against the County shall be limited to that portion of the Contract Amount earned through the date of termination. The Contractor shall not be entitled to any other or further recovery against the County, including, but not limited to, any damages or any anticipated profit on portions of the services not performed.

- 10. **NO DISCRIMINATION.** The Contractor agrees that there shall be no discrimination as to race, sex, color, creed or national origin.
- 11. <u>INSURANCE</u>. The Contractor shall provide insurance as follows:
 - A. <u>Commercial General Liability:</u> Coverage shall have minimum limits of \$1,000,000 Per Occurrence, \$2,000,000 aggregate for Bodily Injury Liability and Property Damage Liability. This shall include Premises and Operations; Independent Contractors; Products and Completed Operations and Contractual Liability.

- B. <u>Business Auto Liability:</u> Coverage shall have minimum limits of \$500,000 Per Occurrence, Combined Single Limit for Bodily Injury Liability and Property Damage Liability. This shall include: Owned Vehicles, Hired and Non-Owned Vehicles and Employee Non-Ownership.
- C. <u>Workers' Compensation</u>: Insurance covering all employees meeting Statutory Limits in compliance with the applicable state and federal laws.

The coverage must include Employers' Liability with a minimum limit of \$100,000 for each accident.

D. <u>Professional Liability:</u> Shall be maintained by the Contractor to ensure its legal liability for claims arising out of the performance of professional services under this Agreement. Contractor waives its right of recovery against County as to any claims under this insurance. Such insurance shall have limits of not less than \$1,000,000 each claim and in the aggregate.

<u>Special Requirements</u>: Collier County Government shall be listed as the Certificate Holder and included as an <u>Additional Insured</u> on the Comprehensive General Liability Policy.

Current, valid insurance policies meeting the requirement herein identified shall be maintained by Contractor during the duration of this Agreement. The Contractor shall provide County with certificates of insurance meeting the required insurance provisions. Renewal certificates shall be sent to the County ten (10) days prior to any expiration date. Coverage afforded under the policies will not be canceled or allowed to expire until the greater of: ten (10) days prior written notice, or in accordance with policy provisions. Contractor shall also notify County, in a like manner, within twenty-four (24) hours after receipt, of any notices of expiration, cancellation, non-renewal or material change in coverage or limits received by Contractor from its insurer, and nothing contained herein shall relieve Contractor of this requirement to provide notice.

Contractor shall ensure that all subcontractors comply with the same insurance requirements that he is required to meet.

12. <u>INDEMNIFICATION</u>. To the maximum extent permitted by Florida law, the Contractor shall indemnify and hold harmless Collier County, its officers and employees from any and all liabilities, damages, losses and costs, including, but not limited to, reasonable attorneys' fees and paralegals' fees, whether resulting from any claimed breach of this Agreement by Contractor, any statutory or regulatory violations, or from personal injury, property damage, direct or consequential

damages, or economic loss, to the extent caused by the negligence, recklessness, or intentionally wrongful conduct of the Contractor or anyone employed or utilized by the Contractor in the performance of this Agreement. This indemnification obligation shall not be construed to negate, abridge or reduce any other rights or remedies which otherwise may be available to an indemnified party or person described in this paragraph.

This section does not pertain to any incident arising from the sole negligence of Collier County.

- 12.1 The duty to defend under this Article 12 is independent and separate from the duty to indemnify, and the duty to defend exists regardless of any ultimate liability of the Contractor, County and any indemnified party. The duty to defend arises immediately upon presentation of a claim by any party and written notice of such claim being provided to Contractor. Contractor's obligation to indemnify and defend under this Article 12 will survive the expiration or earlier termination of this Agreement until it is determined by final judgment that an action against the County or an indemnified party for the matter indemnified hereunder is fully and finally barred by the applicable statute of limitations.
- 13. <u>CONTRACT ADMINISTRATION</u>. This Agreement shall be administered by the Collier County Tourism Department, on behalf of the Naples, Marco Island, Everglades Convention and Visitors Bureau (CVB).
- 14. <u>CONFLICT OF INTEREST.</u> Contractor represents that it presently has no interest and shall acquire no interest, either direct or indirect, which would conflict in any manner with the performance of services required hereunder. Contractor further represents that no persons having any such interest shall be employed to perform those services.
- 15. <u>COMPONENT PARTS OF THIS CONTRACT.</u> This Contract consists of the following component parts, all of which are as fully a part of the contract as if herein set out verbatim: Contractor's Proposal, Insurance Certificate(s), Exhibit A Scope of Services, Exhibit B Fee Schedule, RFP #16-6563 and Addenda.
- 16. <u>SUBJECT TO APPROPRIATION</u>. It is further understood and agreed by and between the parties herein that this agreement is subject to appropriation by the Board of County Commissioners.
- 17. PROHIBITION OF GIFTS TO COUNTY EMPLOYEES. No organization or individual shall offer or give, either directly or indirectly, any favor, gift, loan, fee, service or other item of value to any County employee, as set forth in Chapter 112, Part III, Florida Statutes, Collier County Ethics Ordinance No. 2004-05, as amended, and County Administrative Procedure 5311. Violation of this provision may result in one or more of the following consequences: a. Prohibition by the individual, firm,

and/or any employee of the firm from contact with County staff for a specified period of time; b. Prohibition by the individual and/or firm from doing business with the County for a specified period of time, including but not limited to: submitting bids, RFP, and/or quotes; and, c. immediate termination of any contract held by the individual and/or firm for cause.

- 18. COMPLIANCE WITH LAWS. By executing and entering into this agreement, the Contractor is formally acknowledging without exception or stipulation that it agrees to comply, at its own expense, with all federal, state and local laws, codes, statutes, ordinances, rules, regulations and requirements applicable to this Agreement, including but not limited to those dealing with the Immigration Reform and Control Act of 1986 as located at 8 U.S.C. 1324, et seq. and regulations relating thereto, as either may be amended; taxation, workers' compensation, equal employment and safety (including, but not limited to, the Trench Safety Act, Chapter 553, Florida Statutes), and the Florida Public Records Law Chapter 119, including specifically those contractual requirements at F.S. § 119.0701(2)(a)-(d) and (3) stated as follows:
 - (2) In addition to other contract requirements provided by law, each public agency contract for services must include a provision that requires the contractor to comply with public records laws, specifically to:
 - (a) Keep and maintain public records that ordinarily and necessarily would be required by the public agency in order to perform the service.
 - (b) Provide the public with access to public records on the same terms and conditions that the public agency would provide the records and at a cost that does not exceed the cost provided in this chapter 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.
 - (d) Meet all requirements for retaining public records and transfer, at no cost, to the public agency all public records in possession of the contractor upon termination of the contract and destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. All records stored electronically must be provided to the public agency in a format that is compatible with the information technology systems of the public agency.
 - (3) If a contractor does not comply with a public records request, the public agency shall enforce the contract provisions in accordance with the contract.

If Contractor observes that the Contract Documents are at variance therewith, it shall promptly notify the County in writing. Failure by the Contractor to comply with the laws referenced herein shall constitute a breach of this agreement and the County shall have the discretion to unilaterally terminate this agreement immediately.

- 19. OFFER EXTENDED TO OTHER GOVERNMENTAL ENTITIES. Collier County encourages and agrees to the successful proposer extending the pricing, terms and conditions of this solicitation or resultant contract to other governmental entities at the discretion of the successful proposer.
- 20. <u>AGREEMENT TERMS.</u> If any portion of this Agreement is held to be void, invalid, or otherwise unenforceable, in whole or in part, the remaining portion of this Agreement shall remain in effect.
- 21. <u>ADDITIONAL ITEMS/SERVICES.</u> Additional items and/or services may be added to this contract in compliance with the Procurement Ordinance, as amended, and Procurement Procedures.
- 22. DISPUTE RESOLUTION. Prior to the initiation of any action or proceeding permitted by this Agreement to resolve disputes between the parties, the parties shall make a good faith effort to resolve any such disputes by negotiation. The negotiation shall be attended by representatives of Contractor with full decision-making authority and by County's staff person who would make the presentation of any settlement reached during negotiations to County for approval. Failing resolution, and prior to the commencement of depositions in any litigation between the parties arising out of this Agreement, the parties shall attempt to resolve the dispute through Mediation before an agreed-upon Circuit Court Mediator certified by the State of Florida. The mediation shall be attended by representatives of Contractor with full decision-making authority and by County's staff person who would make the presentation of any settlement reached at mediation to County's board for approval. Should either party fail to submit to mediation as required hereunder, the other party may obtain a court order requiring mediation under section 44.102, Fla. Stat.
- 23. <u>VENUE.</u> Any suit or action brought by either party to this Agreement against the other party relating to or arising out of this Agreement must be brought in the appropriate federal or state courts in Collier County, Florida, which courts have sole and exclusive jurisdiction on all such matters.
- 24. <u>KEY PERSONNEL</u>. The Contractor's personnel and management to be utilized for this project shall be knowledgeable in their areas of expertise. The County reserves the right to perform investigations as may be deemed necessary to ensure that competent persons will be utilized in the performance of the contract. The Contractor shall assign as many people as necessary to complete the services on a timely basis, and each

March 28, 2016 New Business 7-c

person assigned shall be available for an amount of time adequate to meet the required service dates. The Contractor shall not change Key Personnel unless the following conditions are met: (1) Proposed replacements have substantially the same or better qualifications and/or experience. (2) that the County is notified in writing as far in advance as possible. The Contractor shall make commercially reasonable efforts to notify Collier County within seven (7) days of the change. The County retains final approval of proposed replacement personnel.

- 25. ORDER OF PRECEDENCE. In the event of any conflict between or among the terms of any of the Contract Documents and/or the County's Board approved Executive Summary, the terms of the Agreement shall take precedence over the terms of all other Contract Documents.
- 26. ASSIGNMENT. Contractor shall not assign this Agreement or any part thereof, without the prior consent in writing of the County. Any attempt to assign or otherwise transfer this Agreement, or any part herein, without the County's consent, shall be void. If Contractor does, with approval, assign this Agreement or any part thereof, it shall require that its assignee be bound to it and to assume toward Contractor all of the obligations and responsibilities that Contractor has assumed toward the County.

IN WITNESS WHEREOF, the parties hereto, have each, respectively, by an authorized person or agent, have executed this Agreement on the date and year first written above.

ATTEST:	BOARD OF COUNTY COMMISSIONERS
Dwight E. Brock, Clerk of Courts	COLLIER COUNTY, FLORIDA
Ву:	By: Donna Fiala, Chairman
Datada	Donna Fiala, Chairman
Dated:(SEAL)	
	Research Data Services, Inc.
	By:
First Witness	Signature
↑Type/print witness name↑	↑Type/print signature and title↑
Second Witness	
↑Type/print witness name↑	
Approved as to Form and Legality:	
3	
Assistant County Attorney	
Print Name	

Exhibit A

Agreement #16-6563 "Tourism Research Services"

Scope of Services

The Contractor, at a minimum, must achieve the requirements of the Scope of Services stated herein.

Task 1a Visitor Profile Study: Commercial Lodging (H/M/C/C)

- The Commercial Lodging Visitor Profile studies will poll and provide the following information to the County.
- The number of visitors staying in commercial lodgings, the related direct expenditures and economic impact, lodging occupancy, average daily rates (ADR), and revenue per available room (RevPAR);
- · Visitor origin numerosity by region,
- Transportation modes including airports of deplanement;
- Motivations and purpose of trip, including leisure, individual business, and meeting/conference travel;
- Incidence of first time visitation;
- · Competing Florida destinations considered;
- Information used in planning visits to Collier;
- Reliance on and usage of the Internet for travel information and/or booking including use
 of Collier's website. We will also include URL's used to get information and to book
 travel. Additionally, we will query about respondents' involvement with social
 media/networking sites and smartphone use;
- · Length of stay, party size, and party composition;
- · Satisfaction with trip, word-of-mouth recommendation, and likelihood of repeat visit;
- Activities enjoyed in the area, including the Everglades, water tourism, culture, sporting events, etc.;
- Average age, age distribution, household income, and occupation categories;
- Party budgets by major expenditure categories, including prepaid expenses. The
 proposed approach provides more accurate and complete estimates of spending because
 expenditures are itemized within major budget categories to aid respondent recall.
 Budgets will be further validated by post visitation responses;
- Exposure to the area's promotional messages and their impact on destination visitation;
- Influential motivators that attract visitors to the Naples, Marco Island, Everglades area;
- Primary international origin markets of interest;
- Visitor generated input reflecting the destination's brand image (open ended destination attributes);

- Tourism industry employment statistics within Collier County;
- Third party reports for economic trends, competitive destination information, and group/meeting impacts.

Task 1b Visitor Impact Study: In Home (V F/R)

In-home visitor profile will be developed by means of a systematic random sample Internet survey of a minimum of 384 Collier County households, with a telephone-based control group. The results of the will be reported in tandem with the Commercial Lodging Visitor Profile data as part of the annual Value of Tourism report. The reports and presentations will detail:

- The number of visitors staying with friends and relatives in Collier County;
- Estimated expenditures;
- In-Home visitor's economic impact on Collier County.

Task 1c Visitor Impact Study: Regional (Day-Tripper)

Throughout a typical year, the County attracts visitors from a regional area within an approximately 50 mile radius of the destination. Such visitors are referred to as "day-trippers." By definition, day-trippers do not spend the night in Collier County. However, day-trippers do use County assets such as public transportation, parks, parking facilities, beaches, causeways, piers, restaurants, retail facilities, entertainment venues, etc.

To capture and quantify the numerosity and related value-added of this visitor segment requires an annual Internet-based study conducted with a random cross section of regional households (minimum sample size 384), with a telephone-based control group. The Contractor will obtain a random sample of email addresses of non-Collier residents located within the ZIP codes defined by a 50 mile radius of the County from a highly reputable national sampling company.

The results of the Day-Tripper Research will be reported with the annual Value of Tourism findings. The report will detail:

- Numerosity;
- · Estimated expenditures;
- Economic impact.

Task 2: Hotel Occupancy and Average Daily Rate Study

Monthly survey of hotels will be performed to determine Occupancy, ADR, Rev Par, Room Demand, Number of Visitors, Visitor Spending, Visitor Economic Impact, Hotel Room Nights. Other information provided will include:



- Location of property;
- Property type;
- The property's total number of lodging units and number of units in the rental pool for the current research month;
- Average occupancy and ADR for the prior month, as well as current occupancy trending;
- Average party size and guests per room;
- Distribution of guests by geographic origin and purpose of trip (i.e., business, meeting/group, leisure, etc.);
- Current levels of reservations and three month forward business level expectations.

Task 3: Impact of Tourism Study

The purpose of the proposed Value of Tourism Study is to develop an up-to-date assessment of the impact of tourism on the economy of Collier County. The Value of Tourism analysis will tie together data from our Visitor Profile (Commercial Lodging, In-Home/V F/R, and Day-Tripper), Occupancy Research, and salient secondary information (i.e., sales tax collections, resort tax collections, NAICS data on employment and wages, etc.)

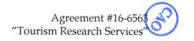
An annual in-depth Value of Tourism report will be provided based on multiple data inputs that will estimate and detail:

- The seasonal and annual volume of overnight visitors to the Naples, Marco Island, Everglades area by geographic origin, nationality, transportation mode, and visit motivation;
- The budget of the typical visitor party by key demographic variables, including spending at hotels, restaurants, shopping, attractions, and gas stations;
- The proportion of taxable retail sales generated by visitors;
- The sales tax, gasoline tax, and local option taxes contributed by visitors and the related savings to Collier County residents;
- Additional employment generated by tourism in the Naples, Marco Island, Everglades area by sector of the economy and tourism related wages;
- Visitor expenditures by sectors of the economy (i.e., restaurants, hotels/motels, etc.).

Task 4. Inquiry Conversion Study

Annual report of random sampling of inquiries for information from toll free number and web site, and direct inquiries to ads. The primary purpose of the conversion research is to assess:

How and why visitors decide on their visitation targets;



- Consumer motivations involved in seeking destination information and making an inquiry relative to household travel planning;
- The proportion of inquiring consumers familiar with the Naples, Marco Island, Everglades area;
- The brand perceptions and location identification current among travel parties who seek information from the CVB;
- The proportion of information seekers with prior Collier visitation experience;
- The proportion of inquiring parties with firm Naples, Marco Island, Everglades area reservation commitments prior to inquiry;
- The proportion of inquirers who at the time of the survey had already completed the planned trip to Collier, their motivations, levels of satisfaction, and planning decisions;
- The proportion of inquirers who are still planning to take their trip to Collier at the time of survey contact, their motivations and planning decisions;
- The proportion of consumers who did not take a trip to Collier, but visited competing destinations, their motivations, experiences, and planning horizons;
- The proportion of people who did not take a trip and are not currently planning to travel;
- The role and effectiveness of advertising in directing travelers to the Naples, Marco Island, Everglades area;
- Details of other social networking and consumer generated media sources consulted (i.e., Facebook, Twitter, blogs, TripAdvisor, discussion boards, YouTube, etc.);
- A profile of competing destinations defined by inquiry respondents, identifying those factors that differentiate these places from the Naples, Marco Island, Everglades area as a destination.

Task 5: Focus Group Research

Qualitative research on an as needed basis to measure or test the following:

- Rate latent consumer motivations and attractability factors that prompt visitation among core markets.
- Obtain a measure of images and preferences for the Naples, Marco Island, Everglades area as a destination, vis à vis the destination's primary competitors.
- Quantify the visitation generation effect of area attractions and events.
- Determine how well advertising and promotional materials "sell" and persuade consumers to visit the destination.
- Test and rate the effectiveness of new creative concepts and positioning platforms.
- Explore the effectiveness of the destination's brand identity among its core visitor markets.
- Test consumers' reactions to websites, their messages and usability.
- Assess awareness of the area as a potential venue for group and meeting business in the meeting planner community.



March 28, 2016 New Business 7-c

The Contractor will implement four (4) domestic or international focus groups each year as part of the research contract. The summary reports for these groups will include an executive summary of the findings and detailed tabulations of the results of the sessions.

Markets targeted for qualitative research will be determined in consultation with CVB staff.

Special Projects

Collier County reserves the right to task the Contractor to perform services that are deemed necessary to be performed as "Special Projects", which are related to the services outlined herein, but which are not specifically set out in this Agreement. All Special Projects must be approved in advance in writing by the County. Payment for Special Projects shall be in accordance with the hourly rate identified in Exhibit "B", together with any properly preapproved Travel and Reimbursable Expenses as defined in this Agreement.

The County reserves the right to order such services from the Contractor as may be required during the contract period, but does not guarantee any minimum or maximum services to be ordered during the contract period specified. Task assignments shall be at the sole discretion of the County as directed by the Tourism Director.

Exhibit "B"

Agreement #16-6563 "Tourism Research Services"

Fee Schedule

Task	Task Description	Number of Surveys	Methodology
1a	Visitor Profile Study Commercial Lodging (H/M/C/C)	150/month	In person, face-to-face and post visitation surveys
1b	In-Home (V F/R)	384/year	Internet with telephone control group
1c	Regional (Day-Tripper)	384/year	Internet with telephone control group
2	Hotel Occupancy and Average Daily Rate Study	80/month	Internet/email, fax, telephone, and/or in-person
3	Impact of Tourism Study	N/A	Part of visitor profile and occupancy research
4	Inquiry Conversion Study	384/biannually	Internet with telephone control group
5	Focus Group Research	8 – 10 groups	Internet and telephone

Total Core Research Program Tasks 1 through 5 Estimated Annual Fee \$120,800.00 to be paid in equal monthly amounts of \$10,066.67 plus travel and reimbursables (out-of-pocket expenses) not-to-exceed six thousand dollars (\$6,000.00) per year.

Hourly billing rate for Special Projects is \$150.00 and is applicable to Time and Materials projects only. Time and Materials: the County agrees to pay the contractor for the amount of labor time spent by the Consultant 's employees and subcontractors to perform the work (number of hours times hourly rate), and for materials and equipment used in the project (cost of materials plus the contractor's mark up). This methodology is generally used in projects in which it is not possible to accurately estimate the size of the project, or when it is expected that the project requirements would most likely change. As a general business practice, these contracts include back-up documentation of costs; invoices would include number of hours worked and billing rate by position (and not company (or subcontractor) timekeeping or payroll records), material or equipment invoices, and other reimbursable documentation for the project.