

RESOLUTION NO. 2018 - 374

**A RESOLUTION BY THE BOARD OF COUNTY COMMISSIONERS OF ST. JOHNS COUNTY, FLORIDA, AUTHORIZING THE COUNTY ADMINISTRATOR, OR DESIGNEE, TO AWARD RFP NO. 18-81 AND TO EXECUTE AGREEMENTS FOR ST. JOHNS COUNTY MARKET RESEARCH AND ECONOMIC IMPACT STUDY.**

**RECITALS**

**WHEREAS**, the County desires to enter into contracts with Downs & St. Germain Research, Inc. to provide a comprehensive Market Research and Economic Impact Study in accordance with RFP No. 18-81; and

**WHEREAS**, the scope of the services shall include research to develop a data collection program, facilitate the collection of that data over a one-year period and complete a data analysis and economic impact study at the end of the data collection period. The project will focus on the St. Johns County tourism industry and shall address trends and shifts in visitation which occur throughout the year, the economic impact of tourism on the various sectors of the economy as well as a whole and the overall composition or profile of the day-use and overnight visitors in accordance with RFP No. 18-81; and

**WHEREAS**, through the County's formal RFP process, Downs & St. Germain Research, Inc. was selected as the number one ranked firm to enter into contract to perform the work referenced above; and

**WHEREAS**, the County has reviewed the terms, provisions, conditions and requirements of the proposed contract (attached hereto, an incorporated herein) and finds that entering into contract to complete the work services serves a public purpose.

**WHEREAS**, the contract will be finalized after negotiations but will be in substantial conformance with the attached draft contract.

**NOW, THEREFORE BE IT RESOLVED BY THE BOARD OF COUNTY COMMISSIONERS OF ST. JOHNS COUNTY, FLORIDA**, as follows:

Section 1. The above Recitals are incorporated by reference into the body of this Resolution and such Recitals are adopted as finds of fact.

Section 2. The County Administrator, or designee, is hereby authorized to award RFP 18-81 to Downs & St. Germain Research, Inc. and to execute a contract to provide the services set forth therein.

Section 3. Upon board approval, the County Administrator, or designee, is authorized to enter into negotiations, and upon successfully negotiations, to execute an agreement in substantially the same form and format as the attached draft on behalf of the County to provide the scope of services as specifically provided in RFP 18-81.

Section 4. To the extent that there are typographical and/or administrative errors that do not change the tone, tenor, or concept of this Resolution, then this Resolution may be revised without subsequent approval by the Board of County Commissioners.

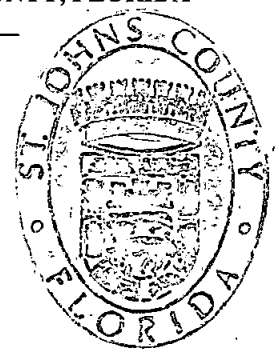
**PASSED AND ADOPTED** by the Board of County Commissioners of St. Johns County, Florida, this 6 day of November, 2018.

**BOARD OF COUNTY COMMISSIONERS OF ST. JOHNS COUNTY, FLORIDA**

By: [Signature]  
Henry Dean, Chair

ATTEST: Hunter S. Conrad, Clerk  
By: [Signature]  
Deputy Clerk

RENDITION DATE 11/8/18





**F CONTRACT AGREEMENT**  
**RFP NO: 18-81; SJC Market Research and Economic Impact Study**  
**Master Contract #:**

This Contract Agreement, ("Agreement") is made as of this \_\_\_\_\_ day of \_\_\_\_\_, 2018 ("Effective Date"), by and between **St. Johns County, FL** ("County"), a political subdivision of the State of Florida, whose principal offices are located at 500 San Sebastian View, St. Augustine, FL 32084, and **Downs and St. Germain Research, Inc** ("Consultant"), authorized to do business in the State of Florida, with offices located at 2992 Habersham Dr., Tallahassee, FL 32309; Phone: (850) 906-3111; Fax: (850) 906-3112; and Email: [joseph@dsg-research.com](mailto:joseph@dsg-research.com), [pd@dsg-research.com](mailto:pd@dsg-research.com).

In consideration of the mutual promises contained herein, the County and the Consultant agree as follows:

**ARTICLE 1 – DURATION AND EXTENSION**

This Agreement shall become effective upon the date of execution by all parties, shall be in effect for an initial contract term of eighteen (18) months, and may be extended as necessary to complete the required services, upon satisfactory performance by the Consultant, mutual agreement by both parties, and the availability of funds. While this Agreement may be renewed and/or extended as stated in this Article, it is expressly noted that the County is under no obligation to renew or extend this Agreement. It is further expressly understood that the option of renewal or extension is exercisable only by the County, and only upon the County's determination that the Consultant satisfactorily performed the Services noted in the Contract Documents.

**ARTICLE 2 - ENUMERATION OF CONTRACT DOCUMENTS**

The term "Contract Documents" shall include all RFP Documents and any addenda/exhibits thereto; all Specifications; this Agreement, any duly executed amendments, addenda, and/or exhibits hereto; and any and all Change Orders.

**ARTICLE 3 - SERVICES**

The Consultant's responsibility under this Agreement is to provide any and all labor, materials, equipment, transportation, and supervision necessary to perform a market research and economic impact study as specified in the Scope of Work, submitted by the Consultant, approved by the County in accordance with RFP No: 18-81 and as otherwise provided in the Contract Documents..

Services provided by the Consultant shall be under the general direction of St. Johns County Tourism and Cultural Development Department or other authorized County designee, who shall act as the County's representative throughout the duration of this Agreement..

**ARTICLE 4 – SCHEDULE**

The Consultant shall perform the required Services according to the schedule submitted and approved by the County. No changes to said schedule shall be made without prior written authorization from the County's representative.

**ARTICLE 5 – COMPENSATION/BILLING/INVOICES**

- A. The County shall compensate the Consultant an amount not to exceed **Forty Seven Thousand Dollars (\$47,000.00)**, in accordance with the pricing proposal attached hereto as Exhibit "A", which shall include any and all direct and indirect costs, and reimbursable expenses. The maximum amount available as compensation to Consultant under this Agreement shall not exceed the amount stated above without the County's express written approval, and amendment to this Agreement.
- B. It is strictly understood that Consultant is not entitled to the above-referenced amount of compensation. Rather, the Consultant's compensation is based upon the Consultant's adhering to the Scope of Work, detailed in this Agreement. As such, the Consultant's compensation is dependent upon satisfactory completion and delivery of all work product and deliverables noted in the Scope of Work, and detailed in this Agreement.
- C. The Consultant shall bill the County for services satisfactorily performed, and materials satisfactorily delivered on a monthly basis. The signature of the Consultant's authorized representative on the submitted invoice shall constitute

the Consultant's certification to the County that:

1. The Consultant has billed the County for all services rendered by it and any of its consultants or sub-consultants through the date of the invoice;
  2. As of the date of the invoice, no other outstanding amounts are due from the County to the Consultant for services rendered;
  3. The reimbursable expenses, if any, have been reasonably incurred; and
  4. The amount requested is currently due and owing.
- D. Though there is no billing form or format pre-approved by either the County, or the Consultant, bills/invoices submitted by the Consultant shall include a detailed written report of the Work accomplished in connection with the Scope of Work, and must be submitted with a Monthly Invoicing Form 1551, as provided by the County. The County may return a bill/invoice from the Consultant, and request additional documentation/information. Under such circumstances, the timeframe for payment will be extended by the time necessary to receive a verified bill/invoice.
- E. The Consultant's acceptance of the County's payment of an invoiced amount shall release the County from any claim by the Consultant, or by the Consultant's consultants or sub-consultants, for work performed but not invoiced during the time period indicated on the invoice for which payment was issued.
- F. Unless otherwise notified, bills/invoices should be delivered to:
- St. Johns County Tourism and Cultural Development Department  
ATTN: Dena Masters  
500 San Sebastian View  
St. Augustine, FL 32084
- G. FINAL INVOICE: In order for the County and the Consultant to reconcile/close their books and records, the Consultant shall clearly indicate "Final Invoice" on the Consultant's final bill/invoice to the County. Such indication establishes that all services have been satisfactorily performed and that all charges and costs have been invoiced to the County and that there is no further Work to be performed under this Agreement.

#### **ARTICLE 6 – TRUTH-IN-NEGOTIATION CERTIFICATE**

The signing of this Agreement by the Consultant shall act as the execution of a truth-in-negotiation certificate certifying that wage rates and other factual unit costs supporting the compensation are accurate, complete, and current as of the date of this Agreement.

The original contract price and any additions thereto shall be adjusted to exclude any significant sums by which the County determines the contract price was increased due to inaccurate, incomplete, or noncurrent wage rates and other factual unit costs. All such contract adjustments shall be made within one (1) year following the end of the Agreement.

#### **ARTICLE 7 – ARREARS**

The Consultant shall not pledge the County's credit or make it a guarantor of payment or surety for any contract, debt, obligation, judgement, lien, or any form of indebtedness. The Consultant further warrants and represents that it has no obligation or indebtedness that would impair its ability to fulfill the terms of this Agreement.

#### **ARTICLE 8 – TERMINATION**

- A. This Agreement may be terminated by the County without cause upon at least thirty (30) calendar days advance written notice to the Consultant of such termination without cause.
- B. This Agreement may be terminated by the County with cause upon at least seven (7) calendar days advance written notice of such termination with cause. Such written notice shall indicate the exact cause for termination.

#### **ARTICLE 9 – NOTICE OF DEFAULT/RIGHT TO CURE**

- A. Should the County fail to perform (default) under the terms of this Agreement, then the Consultant shall provide written notice to the County, which such notice shall include a timeframe of no fewer than fifteen (15) business days in which to cure the default. Failure to cure the default within the timeframe provided in the notice of default (or any

such amount of time as mutually agreed to by the parties in writing), shall constitute cause for termination of this Agreement.

- B. Should the Consultant fail to perform (default) under the terms of this Agreement, then the County shall provide written notice to the Consultant, which such notice shall include a timeframe of no fewer than seven (7) calendar days in which to cure the default. Failure to cure the default within the timeframe provided in the notice of default (or any such amount of time as mutually agreed to by the parties in writing), shall constitute cause for termination of this Agreement.
- C. Consistent with other provisions in this Agreement, Consultant shall be paid for services authorized and satisfactorily performed under this Contract up to the effective date of termination.
- D. Upon receipt of a notice of termination, except as otherwise directed by the County in writing, the Consultant shall:
  - 1. Stop work on the date to the extent specified.
  - 2. Terminate and settle all orders and subcontracts relating to the performance of the terminated work.
  - 3. Transfer all work in process, completed work, and other material related to the terminated work to the County.
  - 4. Continue and complete all parts of the work that have not been terminated.

#### **ARTICLE 10 – PERSONNEL**

The Consultant represents that it has, or shall secure at its own expense, all necessary personnel required to perform the Work as provided in the Contract Documents. It is expressly understood that such personnel shall not be employees of, or have any contractual relationship with the County.

All Work required hereunder shall be performed by the Consultant, or under its supervision. All personnel engaged in performing the Work shall be fully qualified and, if required, authorized or permitted under federal, state and local law to perform such Work.

Any changes or substitutions in the Consultant's key personnel must be made known to the County's representative and written approval granted by the County before said change or substitution can become effective.

The Consultant warrants that all Work shall be performed by skilled and competent personnel to the highest professional standards in the field. The Consultant is responsible for the professional quality, technical accuracy, and timely completion of all work performed hereunder, and shall correct or revise any errors or deficiencies in the Work, without additional compensation.

#### **ARTICLE 11 – SUBCONTRACTING**

The County reserves the right to approve the use of any subcontractor, or to reject the selection of a particular subcontractor, and to inspect all facilities of any subcontractors in order to make a determination as to the capability of the subcontractor to perform the Work described in the Contract Documents. The Consultant is encouraged to seek minority and women business enterprises for participation in subcontracting opportunities.

If a subcontractor fails to satisfactorily perform in accordance with the Contract Documents, and it is necessary to replace the subcontractor to complete the Work in a timely fashion, the Consultant shall promptly do so, subject to approval by the County.

The County reserves the right to disqualify any subcontractor, vendor, or material supplier based upon prior unsatisfactory performance.

#### **ARTICLE 12 – FEDERAL AND STATE TAX**

In accordance with Local, State, and Federal law, the County is exempt from the payment of Sales and Use Taxes. The County shall provide a tax exemption certificate to the Consultant upon request. The Consultant shall not be exempt from the payment of all applicable taxes in its performance under this Agreement. It is expressly understood by the County and by the Consultant that the Consultant shall not be authorized to use the County's Tax Exemption status in any manner.

The Consultant shall be solely responsible for the payment and accounting of any and all applicable taxes and/or withholdings including but not limited to Social Security payroll taxes (FICA), associated with or stemming from Consultant's performance under this Agreement.

**ARTICLE 13 -- AVAILABILITY OF FUNDS**

The County's obligations under this Agreement are contingent upon the lawful appropriation of sufficient funds, for that purpose, by the St. Johns County Board of County Commissioners. Pursuant to the requirements of Section 129.07, Florida Statutes, payment made under this Agreement shall not exceed the amount appropriate in the County's budget for such purpose in that fiscal year. Nothing in this Agreement shall create any obligation on the part of the Board of County Commissioners to appropriate such funds for the payment of services provided under this Agreement during any given County fiscal year. Moreover, it is expressly noted that the Consultant cannot demand that the County provide any such funds in any given County Fiscal Year.

**ARTICLE 14 - INSURANCE**

The Consultant shall not commence work under this Agreement until he/she has obtained all insurance required under this section and such insurance has been approved by the County. All insurance policies shall be issued by companies authorized to do business under the laws of the State of Florida. The Consultant shall furnish proof of Insurance to the County prior to the commencement of operations. The Certificate(s) shall clearly indicate the Consultant has obtained insurance of the type, amount, and classification as required by contract and that no material change or cancellation of the insurance shall be effective without thirty (30) days prior written notice to the County. Certificates shall specifically include the County as Additional Insured for all lines of coverage except Workers' Compensation and Professional Liability. A copy of the endorsement must accompany the certificate. Compliance with the foregoing requirements shall not relieve the Consultant of its liability and obligations under this Agreement.

Certificate Holder Address: St. Johns County, a political subdivision of the State of Florida  
500 San Sebastian View  
St. Augustine, FL 32084

The Consultant shall maintain during the life of this Agreement, Comprehensive General Liability Insurance with minimum limits of \$1,000,000 per occurrence, \$2,000,000 aggregate to protect the Consultant from claims for damages for bodily injury, including wrongful death, as well as from claims of property damages which may arise from any operations under this Agreement, whether such operations be by the Consultant or by anyone directly employed by or contracting with the Consultant.

The Consultant shall maintain during the life of this Agreement, Professional Liability or Errors and Omissions Insurance with minimum limits of \$1,000,000.

The Consultant shall maintain during the life of this Agreement, Comprehensive Automobile Liability Insurance with minimum limits of \$300,000 combined single limit for bodily injury and property damage liability to protect the Consultant from claims for damages for bodily injury, including the ownership, use, or maintenance of owned and non-owned automobiles, including rented/hired automobiles whether such operations be by the Consultant or by anyone directly or indirectly employed by a Consultant.

The Consultant shall maintain during the life of this Agreement, adequate Workers' Compensation Insurance in at least such amounts as are required by the law for all of its employees (if three or more) per Florida Statute 440.02.

In the event of unusual circumstances, the County Administrator, or his designee, may adjust these insurance requirements.

**ARTICLE 15 - INDEMNIFICATION**

The Consultant shall indemnify and hold harmless the County and its officers and employees from claims, liabilities, damages, losses, and costs, including court costs, expert witness and reasonable professional consultation services, and reasonable attorneys' fees, arising out of and to the extent of the Consultant's errors, omissions, or negligence. The Consultant shall not be liable to, nor be required to indemnify the County for, any portions of damages arising out of any error, omission, or negligence of the County or its officers and employees.

## **ARTICLE 16 – SUCCESSORS AND ASSIGNS**

The County and the Consultant each binds itself and its partners, successors, executors, administrators and assigns to the other party of this Agreement and to the partners, successors, executors, administrators and assigns of such other party, in respect to all covenants of this Agreement. Except as above, neither the County nor the Consultant shall assign, sublet, convey or transfer its interest in this Agreement without the written consent of the other. Nothing herein shall be construed as creating any personal liability on the part of any officer or agent of the County, which may be a party hereto, nor shall it be construed as giving any rights or benefits hereunder to anyone other than the County and the Consultant.

## **ARTICLE 17 – NO THIRD PARTY BENEFICIARIES**

It is expressly understood by the County, and the Consultant, and this Agreement explicitly states that no third party beneficiary status or interest is conferred to, or inferred to, any other person or entity.

## **ARTICLE 18 – REMEDIES**

No remedy herein conferred upon any party is intended to be exclusive, or any other remedy, and each and every such remedy shall be cumulative and shall be in addition to every other remedy given hereunder or nor or hereafter existing at law or in equity or by statute or otherwise. No single or partial exercise by any party or any right, power, or remedy hereunder shall preclude any other or further exercise thereof.

In any action brought by either party for the enforcement of the obligations of the other party, the prevailing party shall be entitled to recover reasonable attorney's fees.

## **ARTICLE 19 – CONFLICT OF INTEREST**

The Consultant represents that it presently has no interest and shall acquire no interest, either directly or indirectly, which would conflict in any manner with the performance of services required hereunder. The Consultant further represents that no person having any interest shall be employed for said performance.

The Consultant shall promptly notify the County, in writing, by certified mail, of all potential conflicts of interest for any prospective business association, interest or other circumstance, which may influence or appear to influence the Consultant's judgment or quality of services being provided hereunder. Such written notification shall identify the prospective business association, interest or circumstance, the nature of work that the Consultant may undertake and request an opinion of the County, whether such association, interest, or circumstance constitutes a conflict of interest if entered into by the Consultant.

The County agrees to notify the Consultant of its opinion by certified mail within thirty (30) days of receipt of notification by the Consultant. If, in the opinion of the County, the prospective business association, interest or circumstance would not constitute a conflict of interest by the Consultant, the County shall so state in the notification and the Consultant shall, at his/her option enter into said association, interest or circumstance and it shall be deemed not in conflict of interest with respect to services provided to the County by the Consultant under the terms of this Agreement.

## **ARTICLE 20 – EXCUSABLE DELAYS**

The Consultant shall not be considered in default by reason of any delay in performance if such delay arises out of causes reasonably beyond the Consultant's control and without its fault or negligence. Such cases may include, but are not limited to: acts of God; the County's ommissive and commissive failures; natural or public health emergencies; freight embargoes; and severe weather conditions.

If delay is caused by the failure of the Consultant's subcontractor(s) to perform or make progress, and if such delay arises out of causes reasonably beyond the control of the Consultant and its subcontractor(s) and is without the fault or negligence of either of them, the Consultant shall not be deemed to be in default.

Upon the Consultant's request, the County shall consider the facts and extent of any delay in performing the work and, if the Consultant's failure to perform was without its fault or negligence, the Contract Schedule and/or any other affected provision of this Agreement shall be revised accordingly; subject to the County's right to change, terminate, or stop any or all of the Work at any time.

## **ARTICLE 21 – DISCLOSURE AND OWNERSHIP OF DOCUMENTS**

The Consultant shall deliver to the County for approval and acceptance, and before being eligible for final payment of any amounts due, all documents and materials prepared by and for the County under this Agreement.

All written and oral information not in the public domain, or not previously known, and all information and data obtained, developed, or supplied by the County, or at its expense, shall be kept confidential by the Consultant and shall not be disclosed to any other party, directly or indirectly, without the County's prior written consent, unless required by a lawful order. All drawings, maps, sketches, and other data developed, or purchased under this Agreement, or at the County's expense, shall be and remains the County's property and may be reproduced and reused at the discretion of the County.

The County and the Consultant shall comply with the provisions of Chapter 119, Florida Statutes (Public Records Law).

All covenants, agreements, representations and warranties made herein, or otherwise made in writing by any party pursuant hereto, including but not limited to, any representations made herein relating to disclosure or ownership of documents, shall survive the execution and delivery of this Agreement and the consummation of the transactions contemplated hereby.

## **ARTICLE 22 – INDEPENDENT CONSULTANT RELATIONSHIP**

The Consultant is, and shall be, in the performance of all work services and activities under this Agreement, an independent consultant, and not an employee, agent, or servant of the County. All persons engaged in any of the work or services performed pursuant to this Agreement shall at all times and in all places be subject to the Consultant's sole direction, supervision, and control.

The Consultant shall exercise control over the means and manner in which it and its employees perform the work, and in all respects the Consultant's relationship and the relationship of its employees to the County shall be that of an independent consultant and not as employees or agents of the County. The Consultant does not have the power or authority to bind the County in any promise, agreement or representation other than specifically provided for in this Agreement.

## **ARTICLE 23 – CONTINGENT FEES**

Pursuant to Section 287.055(6), Florida Statutes, the Consultant warrants that it has not employed or retained any company or person, other than a bona fide employee working solely for the Consultant to solicit or secure this Agreement and that it has not paid or agreed to pay any person, company, corporation, individual, or firm, other than a bona fide employee working solely for the Consultant, any fee, commission, percentage, gift, or any other consideration contingent upon or resulting from the award or making of this Agreement.

Violation of this section shall be grounds for termination of this Agreement. If this Agreement is terminated for violation of this section, the County may deduct from the contract price, or otherwise recover, the full amount of such fee, commission, percentage, gift, or other consideration.

## **ARTICLE 24 – ACCESS AND AUDITS**

The Consultant shall maintain adequate records to justify all charges, expenses, and costs incurred in performing the work for at least three (3) years after completion of this Agreement. The County shall have access to such books, records, and documents as required in this section for the purpose of inspection or audit during normal business hours, at the County's cost, upon five (5) days written notice.

## **ARTICLE 25 – NONDISCRIMINATION**

The Consultant warrants and represents that all of its employees are treated equally during employment without regard to race, color, religion, physical handicap, sex, age or national origin.

## **ARTICLE 26 – ENTIRETY OF CONTRACTUAL AGREEMENT**

The County and the Consultant agree that this Agreement, signed by both parties sets forth the entire agreement between the parties, and that there are no promises or understandings other than those stated herein, or are incorporated by reference into this Agreement. None of the provisions, terms, conditions, requirements, or responsibilities noted in this Agreement may be amended, revised, deleted, altered, or otherwise changed, modified, or superseded, except by written

instrument, duly executed by authorized representatives of both the County, and the Consultant.

**ARTICLE 27 – ENFORCEMENT COSTS**

If any legal action or other proceeding is brought for the enforcement of this Agreement, or because of an alleged dispute, breach, default or misrepresentation in connection with any provisions of this Agreement, the successful or prevailing party or parties shall be entitled to recover reasonable attorney's fees, court costs and all reasonable expenses even if not taxable as court costs (including, without limitation, all such reasonable fees, costs and expenses incident to appeals), incurred in that action or proceedings, in addition to any other relief to which such party or parties may be entitled.

**ARTICLE 28 – COMPLIANCE WITH APPLICABLE LAWS**

Both the County and the Consultant shall comply with any and all applicable laws, rules, regulations, orders, and policies of the County, State, and Federal Governments.

**ARTICLE 29 – AUTHORITY TO PRACTICE**

The Consultant hereby represents and warrants that it has and shall continue to maintain all licenses and approvals required to conduct its business, and that it shall at all times, conduct its business activities in a reputable manner.

**ARTICLE 30 – SEVERABILITY**

If any term or provision of this Agreement, or the application thereof to any person or circumstances shall, to any extent, be held invalid or unenforceable, the remainder of this Agreement, or the application of such items or provision, to persons or circumstances other than those as to which it is held invalid or unenforceable, shall not be affected and every other term and provision of this Agreement shall be deemed valid and enforceable to the extent permitted by law.

**ARTICLE 31 - AMENDMENTS AND MODIFICATIONS**

No amendments or modifications of this Agreement shall be valid unless in writing and signed by each of the parties.

The County reserves the right to make changes in the work, including alterations, reductions therein or additions thereto. Upon receipt by the Consultant of the County's notification of a contemplated change, the Consultant shall: (1) if requested by the County, provide an estimate for the increase or decrease in cost due to the contemplated change; (2) notify the County of any estimated change in the completion date; and (3) advise the County in writing if the contemplated change shall effect the Consultant's ability to meet the completion dates or schedules of this Agreement. If the County instructs in writing, the Consultant shall suspend work on that portion of the project, pending the County's decision to proceed with the change. If the County elects to make the change, the County shall issue a Change Order for changes, or a contract change order, if the original contract is to be changed or amended the Consultant shall not commence work on any such change until such written change order has been issued and signed by each of the parties.

**ARTICLE 32 – FLORIDA LAW & VENUE**

This Agreement shall be governed by the laws of the State of Florida. Any and all legal action necessary to enforce this Agreement shall be held in St. Johns County, Florida.

**ARTICLE 33 – ARBITRATION**

The County shall not be obligated to arbitrate or permit any arbitration binding on the County under any of the Contract Documents or in connection with the project in any manner whatsoever.

**ARTICLE 34 - NOTICES**

All notices required in this Agreement shall be sent by certified mail, return receipt requested, and if sent to the County shall be mailed to:

St. Johns County Purchasing Department  
Attn: Leigh A. Daniels, CPPB  
Procurement Supervisor / Acting Purchasing Manager  
500 San Sebastian View  
St. Augustine, FL 32084

and if sent to the Consultant shall be mailed to:

Downs and St. Germain Research, Inc.  
Attn: Joseph St. Germain  
2992 Habersham Dr.  
Tallahassee, FL 32309

#### **ARTICLE 35 - HEADINGS**

The heading preceding the articles and sections herein are solely for convenience of reference and shall not constitute a part of this Agreement, or affect its meaning, construction or effect.

#### **ARTICLE 36 –PUBLIC RECORDS**

- A. The cost of reproduction, access to, disclosure, non-disclosure, or exemption of records, data, documents, and/or materials, associated with this Agreement shall be subject to the applicable provisions of the Florida Public Records Law (Chapter 119, Florida Statutes), and other applicable State and Federal provisions. Access to such public records, may not be blocked, thwarted, and/or hindered by placing the public records in the possession of a third party, or an unaffiliated party.
- B. In accordance and may be extended as necessary to complete the required services, upon satisfactory performance by the Consultant, mutual agreement by both parties, and the availability of funds. While this Agreement may be renewed and/or extended as stated in this Article, it is expressly noted that the County is under no obligation to renew or extend this Agreement. It is further expressly understood that the option of renewal or extension is exercisable only by the County, and only upon the County's determination that the Consultant satisfactorily performed the Services noted in the Contract Documents., and acts on behalf of the County under this Agreement, Contractor shall:
- (1) Keep and maintain public records that ordinarily and necessarily would be required by the County in order to perform the Services;
  - (2) Upon request from the County's custodian of public records, provide the County with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost as provided in Chapter 119, Florida Statutes, or as otherwise provided by law;
  - (3) Ensure that public records related to this Agreement that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by applicable law for the duration of this Agreement and following completion of this Agreement if the Contractor does not transfer the records to the County; and
  - (4) Upon completion of this Agreement, transfer, at no cost, to the County all public records in possession of the Contractor or keep and maintain public records required by the County to perform the Services.

If the Contractor transfers all public records to the County upon completion of this Agreement, the Contractor shall destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. If the Contractor keeps and maintains public records upon completion of this Agreement, the Contractor shall meet all applicable requirements for retaining public records. All records stored electronically must be provided to the County, upon request from the County's custodian of public records, in a format that is compatible with the County's information technology systems.

Failure by the Contractor to comply with the requirements of this section shall be grounds for immediate, unilateral termination of this Agreement by the County.

**IF THE CONTRACTOR HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO ITS DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS AGREEMENT, CONTACT THE CUSTODIAN OF PUBLIC RECORDS AT: 500 San Sebastian View, St. Augustine, FL 32084, (904) 209-0805, [publicrecords@sjcfl.us](mailto:publicrecords@sjcfl.us)**

**ARTICLE 37 – USE OF COUNTY LOGO**

Pursuant to, and consistent with, County Ordinance 92-2 and County Administrative Policy 101.3, the Consultant may not manufacture, use, display, or otherwise use any facsimile or reproduction of the County Seal/Logo without express written approval St. Johns County, Florida.

**ARTICLE 38 – SURVIVAL**

It is explicitly noted that the following provisions of this Agreement, to the extent necessary, shall survive any suspension, termination, cancellation, revocation, and/or non-renewal of this Agreement, and therefore shall be both applicable and enforceable beyond any suspension, termination, cancellation, revocation, and/or non-renewal: (1) Truth-in-Negotiation; (2) Federal and State Taxes; (3) Insurance; (4) Indemnification; (5) Access and Audits; (6) Enforcement Costs; and (7) Access to Records.

**ARTICLE 39 – AUTHORITY TO EXECUTE**

Each party represents that it has the lawful authority to enter into this Agreement and has authorized the execution of this Agreement by the party’s authorized representative shown below.

IN WITNESS WHEREOF, authorized representatives of the COUNTY, and CONSULTANT have executed this Contract Agreement on the day and year below noted.

-----  
**ST. JOHNS COUNTY, FL:**

**CONSULTANT:**

Leigh Daniels, CPPB  
Printed Name of County Representative

Downs and St. Germaine, Inc.  
Company Name

Acting Purchasing Manager  
Title of County Representative

\_\_\_\_\_  
Signature of Consultant Representative

\_\_\_\_\_  
Signature County Representative

\_\_\_\_\_  
Printed Name & Title

\_\_\_\_\_  
Date of Execution

\_\_\_\_\_  
Date of Execution

**ATTEST:  
ST. JOHNS COUNTY, FL  
CLERK OF COURT**

\_\_\_\_\_  
Deputy Clerk

\_\_\_\_\_  
Date of Execution

**LEGALLY SUFFICIENT**

\_\_\_\_\_  
Deputy County Attorney

Date of Execution

**RFP NO: 18-81; SJC MARKET RESEARCH AND ECONOMIC IMPACT STUDY**

**EXHIBIT "A" – CONSULTANT'S PRICING PROPOSAL**

The following proposal is presented for:

**SJC TOURISM MARKET RESEARCH AND ECONOMIC IMPACT STUDY**

**TOTAL PROPOSED AMOUNT: \$ 47,000.00**  
(Cost of all deliverables)

Total Proposed Amount: \$ Forty Seven Thousand Dollars Forty Seven Thousand Dollars / 00  
(Amount Written in Words)

Each Respondent shall insert the Total Proposed Amount in both numerals and words for services requested under this sealed RFP. If there is a discrepancy, the amount written in words shall prevail as the correct proposed amount.

In the event of a discrepancy, the County shall calculate the Total Proposed Amount to determine the lowest, responsive, responsible Respondent.

Each Respondent shall submit the unit hourly rates per deliverable and total number of hours proposed in the table below. Hourly rates shall dictate the total proposed amount submitted on the Official County Pricing Proposal Form above. Failure to submit hourly prices for the identified deliverables may result in removal from consideration for award of a contract. The County also reserves the right to utilize the Hourly Rates submitted below for additional, as needed, services.

**PRICING PROPOSAL FORM**  
**ITEMIZED PRICING SCHEDULE FOR TASK DELIVERABLES**  
**HOURLY RATES PER DELIVERABLE**

TASK/DELIVERABLE	HOURLY RATE	X	TOTAL # OF HOURS PROPOSED	=	TOTAL COST TO COUNTY
<b>Task # 1: Familiarization and Development of Survey and Methodology</b>					
Initial Meetings	\$100	X	20	=	\$2,000
Survey Development	\$100	X	20	=	\$2,000
Research design development	\$100	X	20	=	\$2,000
Develop relationships with industry partners	\$100	X	30	=	\$3,000
<b>Task # 2: Data Collection</b>					
In-person interviews	\$40	X	600	=	\$24,000
Other data collection efforts	\$40	X	50	=	\$2,000
<b>Task # 3: Evaluation and Reporting</b>					
Preparing quarterly reports	\$100	X	80	=	\$8,000
Preparing annual reports	\$100	X	20	=	\$2,000
Presenting reports and meetings	\$100	X	20	=	\$2,000
<b>TOTAL COST FOR ALL DELIVERABLES (TASK #s 1 – 3)</b>					<b>\$47,000</b>
*Total of itemized deliverables must equal Total Proposed Amount on previous page of the official Pricing Proposal Form					

## RFP NO: 18-81; SJC MARKET RESEARCH AND ECONOMIC IMPACT STUDY

### EXHIBIT "C" – SCOPE OF SERVICES

#### C. SCOPE OF SERVICES

##### Task 1 – Familiarization and development of survey and methodology

- Preliminary meeting or phone conference with County staff to confirm goals and timeline of the project.
- Review existing available County specific data supplied by the County including Smith Travel Research, VisaVue, 2016 Brand Perception Study, Tax Collector data, etc.
- Interview Tourism Development Council board members, St. Johns County staff and community industry leaders as appropriate to determine tourism related areas of interest which the data collection efforts should address. At a minimum, the collected data must be sufficient for the Consultant to:
  1. Estimate a total overnight capacity for visitors in the County.
  2. Estimate total number of visitors to the County annually with a breakdown of day-use visitors vs. overnight visitors.
  3. Create a visitor profile for the overall visitor, the day-use visitor and the overnight visitor.
  4. Establish and assess annual and seasonal tourism trends.
  5. Assess the economic impact of tourism as a whole and by specific industry (e.g. accommodations and lodging, restaurants and dining, attractions, shopping and souvenirs, etc.)
- With input from County staff, develop a methodology that collects tourism industry specific data from across the County at a minimum of one week (Sunday through Saturday) a month for a 12-month period.

##### Task 2 - Data collection

- In accordance with the County approved methodology from Task 1, collect tourism industry specific data from across the County a minimum of one week (Sunday through Saturday) a month for a 12-month period.
- Interview County industry leaders as appropriate to determine observed tourism use patterns, trends and impacts in the St. Johns County market.

##### Task 3 – Evaluation and Reporting

- Utilize data available to the County (e.g. Smith Travel Research, VisaVue, Brand Perception Study 2016, Tax Collector data, etc.) along with data collected in task 2 to draft a report which:
  1. Estimate a total overnight capacity for visitors in the County.
  2. Estimate total number of visitors to the County annually with a breakdown of day-use visitors and overnight visitors.
  3. Details visitor profiles for the overall St. Johns County Tourist as well as a breakdown of overnight visitor profiles vs. day-use visitor profiles.
  4. Identifies annual and seasonal trends and shifts in tourism.
  5. Assess the economic impact of tourism as a whole and by specific industry (e.g. accommodations and lodging, restaurants and dining, attractions, shopping and souvenirs, etc.)
- Provide a copy of the draft report to County staff for initial review and present the draft report to the Tourist development Council at a regularly scheduled meeting.
- Revise/clarify the draft report incorporating as appropriate input from County staff and the Tourist Development Council.
- Provide five hard copies and an electronic copy of the revised final report to the County.



## St. Johns County Board of County Commissioners

Purchasing Division

### NOTICE OF INTENT TO AWARD

September 24, 2018

**RE:** RFP 18-81; St. Johns County Tourism Market Research and Economic Impact Study

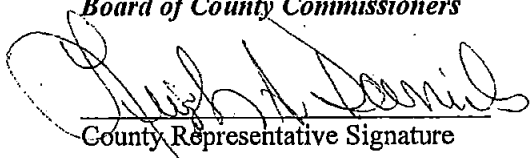
Please be advised that the Purchasing Department of St. Johns County is issuing this notice of its Intent to Award a contract, after successful negotiations, to Downs and St. Germain, Inc. as the top ranked firm under RFP 18-81; St. Johns County Tourism Market Research and Economic Impact Study. This notice will remain posted on the **St. Johns County Purchasing Department bulletin board** until 10:00AM, Thursday, September 27, 2018.

Any person (including any bidder or proposer) who is, or claims to be, adversely affected by the County's decision or proposed decision shall file a written Notice of Protest with the Purchasing Department of St. Johns County within 72 hours after the posting of the notice of decision or proposed decision. Failure to file a Notice of Protest within the time prescribed in Section 304.10 of the St. Johns County Purchasing Manual (the Bid Protest Procedure), or failure to post the bond or other security required by the County within the time allowed for filing a bond, shall constitute a waiver of proceedings and a waiver of the right to protest. The protest procedures may be obtained from the Purchasing Department and are included in the County's Purchasing Manual. All of the terms and conditions of the County Purchasing Manual are incorporated herein by reference and are fully binding.

Should the Purchasing Department receive no protests in response to this notice, an agenda item will be submitted to the St. Johns County Board of County Commissioners for their consideration and subsequent approval to award a contract.

Please forward all correspondence, requests or inquiries directly to Travis Hembree Procurement Coordinator at [thembree@sjcfl.us](mailto:thembree@sjcfl.us).

Sincerely,  
*St. Johns County*  
*Board of County Commissioners*

  
County Representative Signature

Date: 9/24/18

Leigh A. Daniels, CPPB  
Procurement Supervisor/Acting Purchasing Manager  
Purchasing Division  
(904) 209-0154 – Direct  
(904) 209-0155 – Fax  
[ldaniels@sjcfl.us](mailto:ldaniels@sjcfl.us)



**ST. JOHNS COUNTY  
PURCHASING DEPARTMENT**  
500 San Sebastian View  
St. Augustine, Florida 32084

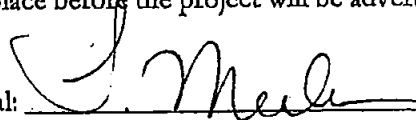
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**I N T E R O F F I C E   M E M O R A N D U M**

---

**TO:** Tera Meeks, Tourism and Cultural Development Director  
**FROM:** Travis Hembree, Procurement Coordinator  
**SUBJECT:** RFP No. 18-81, SJC Market Research and Economic Impact Study  
**DATE:** September 20, 2018

By signing below, the above referenced Project Manager acknowledges receipt of the final RFP Documents for the above project, and approves the advertisement of the RFP as it has been provided. Budget must be in place before the project will be advertised.

Approval: 

Date: 9/20/18

Budget Amount: \$47,000

GL # and/or Project #: 1116 1148 53100

ST JOHNS COUNTY  
SEP 21 '18  
PURCHASING

ST. JOHNS COUNTY, FLORIDA

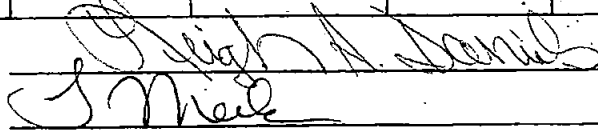
September 20, 2018  
RFP #18-81 SJC Market Research  
and Economic Impact Study

ST. JOHNS COUNTY  
PURCHASING  
SEP 21 11 27 AM '18

FIRM	RATER	RATER	RATER	Total	Rank
	Tera Meeks	Teddy Meyer	Dianya Markovits		
Smart Advantage	57	48	48	153	4
C.H. Johnson Consulting, Inc.	74	70	84	228	2
Downs & St. Germain, Inc.	100	90	90	280	1
MMGY Global, LLC	45	82	67	194	3

APPROVED: Purchasing Manager

Tourism and Cultural Development Director



**NOTE:**

THE RANKING SHOWN ABOVE MUST BE FOLLOWED UNLESS SPECIAL CONDITIONS MERIT A CHANGE IN THE NEGOTIATING ORDER, IN THIS CASE, THE SPECIAL CONDITIONS MUST BE EXPLAINED IN DETAIL IN THE COMMENTS SECTION OR ATTACHED TO THIS RANKING SHEET.

POSTING TIME/DATE FROM 1:00 PM September 24, 2018, UNTIL 1:00 PM September 27, 2018.

ANY RESPONDENT AFFECTED ADVERSELY BY AN INTENDED DECISION WITH RESPECT TO THE AWARD OF ANY REQUEST FOR PROPOSAL, SHALL FILE WITH THE PURCHASING DEPARTMENT FOR ST. JOHNS, A WRITTEN NOTICE OF INTENT TO FILE A PROTEST NOT LATER THAN SEVENTY-TWO (72) HOURS (EXCLUDING SATURDAY, SUNDAY AND LEGAL HOLIDAYS) AFTER THE POSTING OF THE NOTICE OF INTENT TO AWARD. PROTEST PROCEDURES MAY BE OBTAINED IN THE PURCHASING DEPARTMENT.

**Part VII: ATTACHMENTS/FORMS**

**REQUEST FOR PROPOSALS (RFP) NO: 18-81  
SJC TOURISM MARKET RESEARCH AND ECONOMIC IMPACT STUDY**

**COVER PAGE**

**SUBMIT ONE (1) HARD-COPY ORIGINAL  
AND ONE (1) EXACT ELECTRONIC COPY ON USB DRIVE TO:**

**PURCHASING DEPARTMENT  
ST. JOHNS COUNTY  
500 SAN SEBASTIAN VIEW  
ST. AUGUSTINE FLORIDA 32084  
ATTN: Travis Hembree, Procurement Coordinator**

**FULL LEGAL NAME OF COMPANY: Downs & St. Germain Research, INC**

**MAILING ADDRESS: 2992 Habersham Drive, Tallahassee, FL 32309**

**CONTACT EMAIL ADDRESS: Joseph@dsg-research.com**

**DATE: August 21, 2018**

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Cover Letter RFP 18-81 St. Johns County Tourism Market Research

**Legal Name:** Downs & St. Germain Research, Inc.

**Address:** 2992 Habersham Drive Tallahassee, FL 32309

**Contacts:** 850.906.3111 850.906.3112 (fax) [Joseph@dsg-research.com](mailto:Joseph@dsg-research.com)  
[pd@dsg-research.com](mailto:pd@dsg-research.com)

**Company:** S-Corporation

**Principals:** Joseph St. Germain, Ph.D., President & Phillip Downs, Ph.D., Senior Partner

**Company History:**

Phillip E. Downs, Ph.D., and John R. Kerr, D.B.A. were the founding principals of Downs & St. Germain Research (then Kerr & Downs Research) in 1983. Joseph St. Germain, Ph.D. joined the firm in 2004 and is now President. Roger Formisano, Ph.D., joined the firm as an associate partner in 1999.

In the late 1970s, Drs. Kerr and Downs worked on local government studies for the City of Tallahassee and Leon County governments. From this work, Downs & St. Germain Research was formed and other non-profit clients including state government departments and associations were added to the client list.

Since the mid 1980s, Downs & St. Germain Research has maintained its government and association clients while branching out into national and international association clients for whom we have conducted research in the US, Canada, South America, Europe, and Asia. Government clients include a dozen or so departments of The State of Florida, New York City and State, Delaware, New Jersey, Louisiana, and dozens of city and county governments. We have surveyed over 1,000,000 citizens in seven languages on three continents.

Since 1990, the firm has focused on tourism research working with over 30 Destination Marketing Organizations and other tourism companies.

The firm currently operates out of its Florida office that contains a 30-station CATI (computer assisted telephone interviewing) system and a focus group facility. All analysis and report preparation are conducted from this site.

**Business Philosophy:**

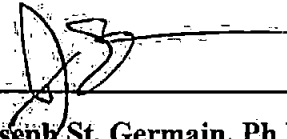
Our philosophy has always been to provide high quality market research by controlling all facets of the research process. We have kept a manageable client list so we can over serve every client. We stress on-time, on-budget, high quality and usable deliverables. We respond to clients' needs within 24 hours, and we visit all of our tourism clients at least 6 times a year. With three Ph.D.s on staff, we position our firm as having the most sophisticated research and statistical tools.

Given our practical business backgrounds, we also position our firm as offering pragmatic strategic recommendations to accompany our research reports.

**Reason for Submittal:**

In the past several years, Downs & St. Germain Research has arguably become the number one tourism research firm in Florida. Through our real-world research with DMOs (Destination Marketing Organizations) and our theoretical advances with FADMO (Florida Association of Destination Marketing Organizations) and TTRA (Travel & Tourism Research Association), we strive to advance the professionalism of the tourism research industry. Many DMOs count their visitors in different ways and many consultants use questionable practices in data collection, modeling, analysis, and reporting. Our goal is to bring more professionalism to the industry and to each DMO including St. Johns County.

**Submitted by:**

  
\_\_\_\_\_  
Joseph St. Germain, Ph.D., President

**8.21.2018**

**DATE**

**REQUEST FOR PROPOSALS (RFP) NO: 18-81  
SJC TOURISM MARKET RESEARCH AND ECONOMIC IMPACT STUDY  
ATTACHMENT "3-A"**

**LICENSES, PERMITS, CERTIFICATIONS**

In the space below, each Respondent shall list all current licenses, permits and/or certifications held relative to the required services as provided herein.

*Each Respondent shall attach a copy of each current license, permit and/or certification listed below to his/her proposal as instructed.*

License Name	License #	Issuing Agency	Expiration Date
NA	NA	NA	NA

**Detail by Entity Name**

Florida Profit Corporation  
DOWNS & ST. GERMAIN RESEARCH, INC.

Filing Information

<b>Document Number</b>	P15000101649
<b>FEI/EIN Number</b>	59-2958952
<b>Date Filed</b>	12/22/2015
<b>Effective Date</b>	01/01/2016
<b>State</b>	FL
<b>Status</b>	ACTIVE

Principal Address

2992 HABERSHAM DR  
TALLAHASSEE, FL 32309

Mailing Address

2992 HABERSHAM DR  
TALLAHASSEE, FL 32309

Registered Agent Name & Address

ST. GERMAIN, JOSEPH I  
2795 SUMMER MEADOW DR  
TALLAHASSEE, FL 32303

Officer/Director Detail

**Name & Address**

**Title P**

ST. GERMAIN, JOSEPH I  
2795 SUMMER MEADOW DR  
TALLAHASSEE, FL 32303

**Title C**

DOWNS, PHILLIP E  
6027 HEARTLAND CIRCLE  
TALLAHASSEE, FL 32312

REQUEST FOR PROPOSALS (RFP) NO: 18-81  
SJC TOURISM MARKET RESEARCH AND ECONOMIC IMPACT STUDY

Full Legal Company Name: Downs & St. Germain Research, Inc.

ATTACHMENT "3-B" CERTIFICATES OF  
INSURANCE

**(Attach or insert copy here)**



DOWN&ST-01

THEAUDOIN

### CERTIFICATE OF LIABILITY INSURANCE

DATE (mm/dd/yyyy)  
02/1/2016

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsements.

<b>PRODUCER</b> Hub International Florida 1117 Thomasville Road Tallahassee, FL 32303	<b>CONTACT NAME</b> PHONE (A/C, H/O, Ext): (850) 386-1111	FAX (A/C, H/O): (850) 395-9827
	<b>ADDRESS:</b>	
<b>INSURED</b> Downe & St. Germain Research, Inc. 2992 Hahorahua Dr. Tallahassee, FL 32309	<b>INSURER(S) AFFORDING COVERAGE</b>	
	insurance A: AmGuard Insurance Company	NAIC # 42390
	insurance B: NorGuard Insurance Company	31470
	insurance C: Underwriters at Lloyd's London	15792
	insurance D: insurance E: insurance F:	

**COVERAGES**      **CERTIFICATE NUMBER:**      **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE DEASURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

TYPE OF INSURANCE	ADDL. INSR. (M/D/Y)	POLICY NUMBER	POLICY EFF. (M/D/Y)	POLICY EXP. (M/D/Y)	Limits
<b>A</b> <input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GENL. AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:		DOBP995471	04/03/2016	04/03/2019	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Per occurrence) \$ 100,000 MED./EXP. (Any one person) \$ Included PERSONAL & ADW. INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS-COMP. PROP. AGG. \$ 2,000,000
<b>A</b> AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input checked="" type="checkbox"/> HIRE/AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY		DOBP995471	04/03/2016	04/03/2019	COMBINED SINGLE LIMIT (Per accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
<b>A</b> <input checked="" type="checkbox"/> UNDERWRITERS <input type="checkbox"/> PROFESSIONAL <input checked="" type="checkbox"/> DEF. <input checked="" type="checkbox"/> REVENUE \$ 10,000		DOWNB29922	04/03/2016	04/03/2019	EACH OCCURRENCE \$ 1,000,000 AGGREGATE \$ AGGREGATE \$ 1,000,000
<b>B</b> PRODUCERS COMPENSATION AND EMPLOYERS LIABILITY ANY CONTRACTOR, PARTNER OR EXECUTIVE OFFICER/OWNER EXCLUSION (Mandatory to 2015) If yes, describe under DESCRIPTION OF OPERATIONS below Y/N N/A		DOWC995066	04/03/2016	04/03/2019	<input checked="" type="checkbox"/> PER CLAIMS <input type="checkbox"/> EITHER EL EACH ACCIDENT \$ 100,000 EL DISEASE - EA EMPLOYEE \$ 100,000 EL DISEASE - POLICY LIMIT \$ 500,000
<b>C</b> Professional Legal		MLC80555	07/10/2016	07/10/2019	Each Occurrence \$ 2,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

<b>CERTIFICATE HOLDER</b> Proposal Purpose	<b>CANCELLATION</b> SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.
	AUTHORIZED REPRESENTATIVE <i>Andrea Beaulain</i>

**REQUEST FOR PROPOSALS (RFP) NO: 18-81  
SJC TOURISM MARKET RESEARCH AND ECONOMIC IMPACT STUDY**

**Full Legal Company Name: Downs & St. Germain Research, Inc.**

**ATTACHMENT "3-C"  
CLAIMS, LIENS, LITIGATION HISTORY**

1. Within the past 7 years, has your organization filed a suit or a formal claim against a project owner as a prime or Sub-Consultant) or been sued by or had a formal claim filed by an owner, Sub-Consultant or supplier resulting from a construction dispute? Yes \_\_\_\_\_ No X If yes, please attach additional sheet(s) to include:

Description of every action Captions of the Litigation or Arbitration

Amount at issue: \_\_\_\_\_ Name(s) of the attorneys representing all parties:

Amount actually recovered, if any: \_\_\_\_\_

Name(s) of the project owner(s)/manager(s) to include address and phone number:

2. List all pending litigation and or arbitration.
3. List and explain all litigation and arbitration within the past seven (7) years – pending, resolved, dismissed, etc.
4. Within the past 7 years, please list all Liens, including Federal, State and Local, which have been filed against your Company. List in detail the type of Lien, date, amount and current status of each lien.

5. Have you ever abandoned a job, been terminated or had a performance/surety bond called to complete a job?

Yes \_\_\_\_\_ No X If yes, please explain in detail:

6. For all claims filed against your company within the past five (5) years, have all been resolved satisfactorily with final judgment in favor of your company within 90 days of the date of judgement became final? Yes \_\_\_\_\_ No \_\_\_\_\_  
If no, explain why? \_\_\_\_\_

7. List the status of all pending claims currently filed against your company:

**Liquidated Damages**

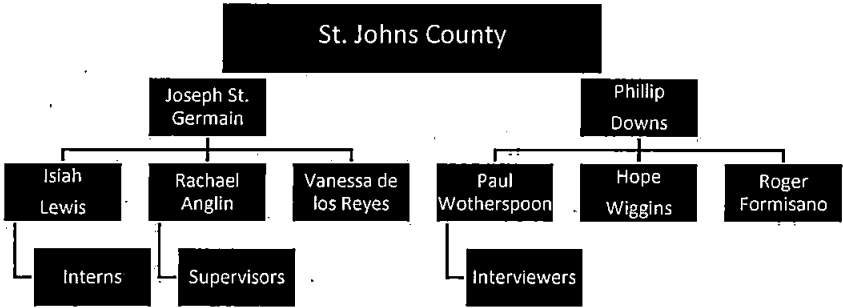
1. Has a project owner ever withheld retainage, issued liquidated damages or made a claim against any Performance and Payment Bonds? Yes \_\_\_\_\_ No X If yes, please explain in detail:

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**REQUEST FOR PROPOSALS (RFP) NO: 18-81**  
**SJC TOURISM MARKET RESEARCH AND ECONOMIC IMPACT STUDY**

**Full Legal Company Name: Downs & St. Germain Research, Inc.**

**ATTACHMENT "3-D"**  
**COMPANY ORGANIZATIONAL CHART**

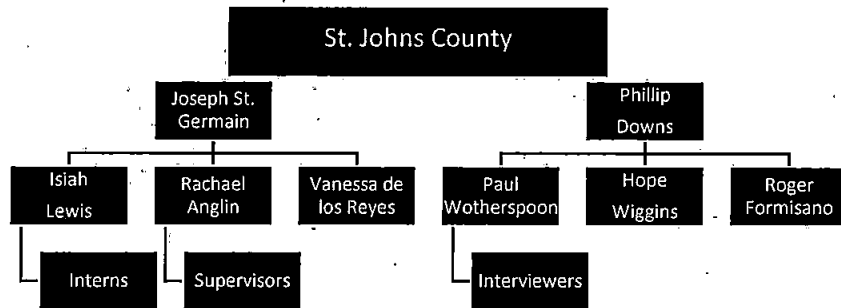


**REQUEST FOR PROPOSALS (RFP) NO: 18-81  
SJC TOURISM MARKET RESEARCH AND ECONOMIC IMPACT STUDY**

**Full Legal Company Name: Downs & St. Germain Research, Inc.**

**ATTACHMENT "3-E"**

**PROJECT TEAM ORGANIZATIONAL CHART**



**REQUEST FOR PROPOSALS (RFP) NO: 18-81  
SJC TOURISM MARKET RESEARCH AND ECONOMIC IMPACT STUDY**

**Full Legal Company Name: Downs & St. Germain Research, Inc.**

**ATTACHMENT "3-F"**

**KEY PERSONNEL LIST**

In the space below, list all qualified personnel who are permanent employees of the company that may be utilized to perform the required scope of services. Attach brief but comprehensive resumes for each staff member listed below.

<b>Employee Name</b>	<b>Employee Title</b>	<b># of Years Employed</b>	<b>Total # Yrs. Experience</b>
Joseph St. Germain, Ph.D.	President	12	12
Phillip Downs, Ph.D.	Senior Partner	35	35
Rachael Anglin	Senior Project Manager	5	5
Isiah Lewis	Project Director	1	1
Hope Wiggins	Project Director	2	2
Paul Wotherspoon	Data Collection Manager	20	20
Roger Formisano, Ph.D.	Associate Director	19	35
Vanessa de los Reyes	Cultural Director	10	10





6. **Project Name** – Tourism Market Research  
**Customer Name:** Visit Pasco County  
**Project Address:** Pasco County  
**Contact:** Adam Thomas, 727.847.8129;  
athomas@pascocountyfl.net  
**Services:** This assignment involves quarterly visitor tracking, annual economic impact studies, and event economic impact studies.  
**Start Date:** March 2018  
**Contract Renewal Date:** August 2021
7. **Project Name** – Tourism Event Research  
**Customer Name:** Visit Tampa Bay  
**Project Address:** Visit Tampa Bay  
**Contact:** Janette Carter, 813.342.4054;  
jcarter@visittampabay.com  
**Services:** This assignment involves collecting visitor tracking data for major events in the Tampa Bay area.  
**Start Date:** September 2016  
**Contract Renewal Date:** August 2019
8. **Project Name** – Branding Research  
**Customer Name:** Louisiana Office of Tourism  
**Project Address:** Louisiana Office of Tourism  
**Contact:** Neal Alfano (Miles Partnership)  
Neal.Alfano@MilesPartnership.com  
**Services:** This assignment involved conducting focus groups in several cities to research brand logo, taglines, advertising, etc.  
**Start Date:** June 2017  
**Contract Renewal Date:** Finished
9. **Project Name** – Branding Research  
**Customer Name:** Kentucky Office of Tourism  
**Project Address:** Kentucky Office of Tourism  
**Contact:** Neal Alfano (Miles Partnership)  
Neal.Alfano@MilesPartnership.com  
**Services:** This assignment involved conducting focus groups in several cities to research brand logo, taglines, advertising, etc.  
**Start Date:** October 2017  
**Contract Renewal Date:** Finished

**REQUEST FOR PROPOSALS (RFP) NO: 18-81  
SJC TOURISM MARKET RESEARCH AND ECONOMIC IMPACT STUDY**

**ATTACHMENT "4-B"**

**REFERENCES**

1. Reference Company Name: Visit Sarasota County  
Date(s) of Service: October 2014 – on-going  
Project Information (Type of Study): Visitor Tracking, Economic Impact, Segmentation Study (PRIZM), Business/Meeting Planner Study, Brand Research, Emotional Positioning Research Partner Research, Local Residents Perceptions of Tourism, Potential Visitors Research.  
Primary Reference Contact Name and Title: Virginia Haley, CDME, President & CEO  
Contact Phone Number: 941.955.0991  
Contact Email Address: vhaley@visitsarasota.org

\*\*\*\*\*

2. Reference Company Name: Visit South Walton  
Date(s) of Service: October 2014 – on-going  
Project Information (Type of Study): Visitor Tracking, Economic Impact, Segmentation Study (PRIZM), Business/Meeting Planner Study, Brand Research, Emotional Positioning Research, Potential Visitors Research, ROI of Advertising  
Primary Reference Contact Name and Title: Jay Tusa, CDME, CTIS, TMP, Executive Director  
Contact Phone Number: 850.622.7801  
Contact Email Address: jay@visitsouthwalton.com

\*\*\*\*\*

3. Reference Company Name: Visit Central Florida  
Date(s) of Service: October 2016 – on-going  
Project Information (Type of Study): Visitor Tracking, Economic Impact, Brand Research, Emotional Positioning Research, Potential Visitor Research  
Primary Reference Contact Name and Title: Mark Jackson, Executive Director  
Contact Phone Number: 863.551.4717  
Contact Email Address: mark@visitcentralflorida.org

\*\*\*\*\*

4. Reference Company Name: Visit Tallahassee  
Date(s) of Service: October 2015 – on-going  
Project Information (Type of Study): Visitor Tracking, Economic Impact, Brand Research, Emotional Positioning Research, Potential Visitor Research, Business Planner Research  
Primary Reference Contact Name and Title: Kerri Post, CDME, Executive Director  
Contact Phone Number: 850.606.2310  
Contact Email Address: PostK@LeonCountyFl.gov

\*\*\*\*\*

5. Reference Company Name: Marion County VCB  
Date(s) of Service: October 2014 – on-going  
Project Information (Type of Study): Visitor Tracking, Economic Impact, Brand Research  
Primary Reference Contact Name and Title: Loretta Shaffer, CDME, Executive Director  
Contact Phone Number: 352.438.2804  
Contact Email Address: Loretta.Shaffer@marioncountyfl.org

\*\*\*\*\*

6. Reference Company Name: Visit Pasco County  
Date(s) of Service: March 2018 – on-going  
Project Information (Type of Study): Visitor Tracking, Economic Impact  
Primary Reference Contact Name and Title: Adam Thomas, Executive Director  
Contact Phone Number: 727.847.8129  
Contact Email Address: athomas@pascocountyfl.net

**REQUEST FOR PROPOSALS (RFP) NO: 18-81  
SJC TOURISM MARKET RESEARCH AND ECONOMIC IMPACT STUDY**

**Resumes of Downs & St. Germain Research's Team**

Joseph St. Germain, Ph.D.

### ***Education***

---

#### **Florida State University**

Ph.D. in Educational Psychology with a Sport Psychology major

M.S. in Educational Psychology with a Sport Psychology major

Received the College of Education Teaching Fellowship

Certificate in Measurement and Statistics

#### **University of Minnesota – Duluth**

B.A.S. in psychology, Minor in coaching

Graduated cum laude and with departmental honors

### ***Professional Experience***

---

#### **Downs & St. Germain Research**

##### ***President***

- Manage market research projects for local, state, and national clients
- Design research methodologies customized to client's needs
- Conduct research via telephone, mail, web surveys, in-depth interviews, and focus groups
- Analyze qualitative and quantitative data
- Develop strategic recommendations to guide client's future marketing and business decision
- Prepare reports of research results
- Present research results and recommendations
- Prepare and submit proposals

#### **Flagler College**

##### ***Professor***

- Teach market research to students

#### **Florida State University**

##### ***Academic Advisor***

- Provided academic advising to students in the College of Human Sciences
- Chair of the Social/Teambuilding Committee
- Chair of the Policy Committee
- Served on the Peer Mentoring Committee
- Leader of a Peer Mentoring Group
- Presenter at NACADA Region IV Conference: March 2006
- Aided in planning and coordinating of the 2007 NACADA Conference
- Workshop facilitator for Orientation Workshop: April 2006 & 2007
- Conducted Preview and Orientation presentations
- Performed student outreach activities

##### ***Graduate Assistant-- Academic Advisor***

- Advised students
- Created First Year Experience (FYE) presentation

Phillip E. Downs, Ph.D.

### ***Education***

---

- Ph.D. - University of North Carolina, Chapel Hill, 1976
- M.B.A. - Bowling Green State University, 1972
- B.S. - Bowling Green State University, 1970

### ***Consulting Experience***

---

- Downs & St. Germain Research
  - 1984 – Present
  - Founding partner
  - Project Director for over 1,000 research projects
  - Moderated over 700 focus group interviews

### ***Professional & Academic Presentations***

---

- 1975-present - 50 presentations at the American Marketing Association, Southern Marketing Association, Academy of Marketing Science, Southeastern American Institute of Decision Sciences, National Operations Research Society of America/The Institute of Decision Sciences, Mid-South Marketing Educators' Conference, American Society of Association Executives, American Association of Public Opinion Research, Journal of Public Policy & Marketing

### ***Academic Experience***

---

- 1985- 2012 - Professor of Marketing, Florida State University
- Associate Professor of Marketing, Florida State University
- Assistant Professor of Marketing, Florida State University
- Assistant Professor of Business Administration, College of William and Mary

### ***Honors and Awards***

---

- American Marketing Doctoral Consortium Fellow
- Southern Marketing Association - Steven J. Shaw Award - Best Paper Award
- Southern Marketing Association - Best paper in the marketing research track
- Tallahassee Society of Association Executives - President's Award
- Florida State University - Outstanding Teaching Award
- American Marketing Association - FSU Chapter, Outstanding Marketing Teaching Award
- American Society of Association Executives, Marketing Section Council Member
- Florida Society of Association Executives, Associate Member of the Year

### ***Publications***

---

- 35 articles in The Marketing Forum, Journal of the Academy of Marketing Science, Journal of Public Policy & Marketing, Handbook of Business Planning and Budgeting, Journal of Business Research, Developments in Marketing Science Volume II, Journal of the Market Research Society, Marketing Management: Strategies and Cases, Developments in Marketing Science, Volume I, Contemporary Marketing Thought

Roger Formisano, Ph.D.

### ***Education***

---

- Ph.D. – University of North Carolina-Chapel Hill
- M.A. – University of New Hampshire
- B.A. – University of New Hampshire

### ***Professional Experience***

---

- **Downs & St. Germain Research**  
*Associate Partner* (2001 – Present)  
Strategic planning  
Present research results and recommendations  
Prepare and submit proposals
- **Formisano & Company**  
*Founder and principal* (2001 – Present)  
Strategic business consulting with an emphasis on strategy articulation and execution, leadership development, and M&A advisory services. The firm has served clients from various industries, and wide-ranging size differences.
- **University of Wisconsin Medical Foundation**  
*Vice President of Leadership Development and Strategy* (part-time 2001 – present)  
University of Wisconsin Medical Foundation is the functional organization for 1,050 physicians practicing at UW Health sites.
- **Visiting Professorships**  
Dr. Formisano currently serves as a Visiting Professor on the business school faculty at HEC in Paris, and ISTCE in Lisbon; where in both cases he teaches Entrepreneurship and Strategy in the MBA program. He also currently teaches the Mergers and Acquisitions course in the eMBA program at UW-Madison.
- **United Wisconsin Services**  
*Executive Vice President and Chief Operating Officer* (1992 -1999)  
Formisano served as Executive Vice President and Chief Operating Officer for United Wisconsin Services, a multi-line, publicly traded insurance company headquartered in Milwaukee, Wisconsin. Formisano served United Wisconsin for seven years and had full responsibility for business units totaling \$500 million in revenue with over 600 employees. Formisano served as President of Compcare, one of the state's largest HMOs and Meridian Resource Corporation, a consulting firm he founded as a subsidiary in Madison, Wisconsin.

### ***Corporate Boards & Awards***

---

- Integrity Mutual Insurance Company (1986-Present)
- Audit Committee Chair (2001-Present)
- Wisconsin Sports Development Foundation (2006-present)
- Badger State Games (1999-2001)

Rachael Anglin

***Education***

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University of Georgia, Athens, Georgia  
Bachelor of Arts, Public Relations, Magna Cum Laude  
Minor, Sociology

***Professional Experience***

---

**Project Director, May 2014 – Present**

Downs & St. Germain Research, Tallahassee, FL

- Assist in the development of questionnaires, surveys, analysis and reports.
- Conduct in-depth data analyses using traditional and advanced methods.
- Co-author reports containing actionable recommendations.

**Public Relations Intern, January 2014- May 2014**

Pure Barre, Athens, GA

- Develop, implement and evaluate a campaign to increase members, retention rates and sales
- Oversee research, goals and objectives, logistics and graphics teams
- Create and manage a system to accurately keep track of hours worked on the campaign

**Public Relations Assistant, June 2013- April 2014**

QuackerSmackers.com, Athens, GA

- Write and distribute press releases
- Create a proposal to obtain sponsors for the website
- Generate surveys to gain insight from the target market
- Attend tradeshows and other events to promote the website

**Marketing Assistant & Proofing and Production, May 2013- August 2013**

Campus Special, Duluth, GA

- Assist business owners with creating deals/offers and with designing advertisements to achieve optimal return
- Manage production of coupon books for over 20 colleges/universities.
- Manage business contracts, payments and other administrative work for over 60 sales representatives
- Meet strict deadlines for production

**Director of Public Relations, September 2012- December 2012**

Four Athens, Athens, GA

- Write and submit press releases and media alerts
- Create and maintain a “Founders’ Fridays” blog for the Four Athens webpage
- Assist in planning and executing Four Athens events

Isiah Lewis

***Education***

---

Florida State University - Tallahassee, FL  
*Bachelor of Science: Marketing*

***Professional Experience***

---

**Project Director, May 2018 – Present**

Downs & St. Germain Research, Tallahassee, FL

- Analyze data on SPSS Statistical output for client reports
- Manage the data collection process
- Assist in the development of questionnaires, surveys, analysis and reports

**Market Research Intern, May 2017- April 2018**

Downs & St. Germain Research, Tallahassee, FL

- Analyze data on SPSS Statistical output to prepare graphs and tables for client annual reports
- Assist with general administration tasks, including contacting interviewers and supervisors
- Conduct research as needed for existing and potential client proposals

**Marketing Intern, January 2017- April 2018**

Visit Tallahassee, Tallahassee, FL

- Developed a project to advertise National Tourism Week to residents
- Oversaw social media postings and track potential reach and followings
- Participated in events focused on promoting Tallahassee as a travel destination

**Student Liaison, Dec 2016- May 2018**

Florida State University Garnet and Gold Guides, Tallahassee, FL

- Used knowledge of Florida State athletics to attract student athletes to attend the university
- Encouraged boosters to be active within Florida State athletics through facility tours
- Managed and facilitated guides relations with recruits during game day activities

**REQUEST FOR PROPOSALS (RFP) NO: 18-81  
SJC TOURISM MARKET RESEARCH AND ECONOMIC IMPACT STUDY**

**Examples of Work Products for Downs & St. Germain Research, Inc.**

# The Value of Visitors to **Amelia Island** in 2016


November 2016

Project Directors:

Phillip E. Downs, Ph.D.  
Joseph St. Germain, Ph.D.  
Rachael Anglin  
Downs & St. Germain Research  
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Tallahassee, FL 32309  
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RESEARCH II



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## EXECUTIVE SUMMARY

This report details the value of visitors to Amelia Island: Their value to Nassau County's economy, to Nassau County government, and to the citizens of Nassau County. The intent of this report is to present factual data from a myriad of sources including Amelia Island Tourist Development Council (AITDC), the Florida Department of Revenue, the Nassau County Property Appraiser, the Nassau County Tax Collectors office, Smith Travel reports, various state of Florida and federal agencies, VISIT FLORIDA, and from visitors themselves. In terms of the economic impact data from visitors to Amelia Island, this study covers calendar year 2015.

This report is compiled by Downs & St. Germain Research, a full service market research firm located in Tallahassee, Florida. Downs & St. Germain Research has been serving clients since 1981 and specializes in tourism research. Downs & St. Germain Research is currently contracted with 8 domestic marketing organizations in Florida to provide visitor and economic impact of tourism research (see Appendix B for more information about Downs & St. Germain Research).

Visitors to Amelia Island have a profound impact on the economy of Nassau County. Visitors to Amelia Island generated \$565.3 million<sup>1</sup> in direct spending in Nassau County in 2015. Visitors<sup>2</sup> spent money on:

- Hotel rooms and vacation properties,
- Meals in local restaurants,
- Items in general merchandise stores,
- Gas,
- Clothes and other retail items,
- Attractions and entertainment, and
- Recreation.



There are many other items visitors purchase in Nassau County after loading up their SUVs with luggage and children to make the trek from Atlanta, Orlando, Jacksonville, and other cities across the southeast. While 74% of visitors drive to Amelia Island, the rest fly<sup>3</sup> in from faraway cities such as New York, Boston, Chicago, and Washington, D.C.

They spend money on the traditional vacation categories listed previously, but they also have emergency medical needs; hire architects, engineers, and contractors to build their second homes; and hire rental management and maintenance companies to rent and care for their second homes.

<sup>1</sup> Sources: AITDC-generated interviews with visitors, surveys with properties to assess occupancy and daily rates, IMPLAN Economic Model, and Downs & St. Germain Research.

<sup>2</sup> Visitors include those who come for a day, a week, or up to six months. It includes people who stay in paid accommodations, stay with friends and relatives, or visit only for the day and not spend the night.

<sup>3</sup> Most visitors who fly to Amelia Island arrive at Jacksonville International Airport (84%).

**FIGURE 1: 2015 Dashboard for Visitors to Amelia Island**

How figures in the following dashboard were determined will be explained throughout the report.

Tourism Category	Statistic	Comment
Number of visitors to Amelia Island	1,297,900	Includes day trippers & people visiting friends and family
Direct spending by visitors to Amelia Island	\$565,326,400	35.6% of all spending in Nassau County
Total economic impact of visitors to Amelia Island	\$746,230,800 <sup>1</sup>	Multiplier effect
Jobs supported by visitors to Amelia Island - direct	13,018	37.3% of all jobs across all industry sectors
Wages for jobs supported by visitors to Amelia Island	\$429,203,460 <sup>2</sup>	33.1% of all wages in Nassau County
Average wage for tourism-supported jobs	\$32,970	
Local & state taxes paid by visitors to Amelia Island	\$78,132,091	Saves each Nassau County household \$2,748
Cost to Nassau County government to service visitors to Amelia Island	\$22,374,649	Infrastructure, public safety, recreation, etc.
Revenue generated for Nassau County government by visitors to Amelia Island	\$62,082,718	Property tax, sales tax, gasoline tax, etc.
Net positive impact to Nassau County government from visitors to Amelia Island	\$39,708,069	
Occupancy rate <sup>4</sup>	62.2%	
Average daily rate <sup>5</sup>	\$197.33	
RevPAR <sup>5</sup>	\$122.19	Revenue per available room

**INSIDE STORY ON VISITORS TO AMELIA ISLAND**

- 100 visitors to Amelia Island = 1 job in Nassau County.
- \$1 spent by AITDC generates \$15.17 for Nassau County government.
- Visitors to Amelia Island save each Nassau County household \$2,748 in local and state taxes.
- \$1 spent by AITDC generates \$5.98 for Nassau County School System.
- Visitors spent \$148 for every \$1 spent by AITDC.
- The typical travel party that stayed in paid accommodations in Amelia Island in 2015 spent \$1,912.

<sup>1</sup> AITDC's 2015 Calendar Year 2015 Visitor Profile that tracks hotels only reported the following: 71.2% occupancy rate, \$214.53 ADR, and \$152.80 RevPAR. The statistics in the table are for all housing that visitors utilize.

**FIGURE 2: Historic View of Visitors to Amelia Island**

Category	2000	2008	2015
All visitors	755,400	982,500	1,297,900
Spending - all visitors	\$267,257,900	\$378,294,700	\$565,326,400 <sup>5</sup>
Total economic impact	\$352,780,400	\$499,349,000	\$746,230,800
Jobs - direct	7,562 <sup>6</sup>	9,836 <sup>6</sup>	13,018 <sup>7</sup>
Jobs - direct + indirect	9,221 <sup>8</sup>	11,583 <sup>8</sup>	14,957 <sup>8</sup>
Tourism jobs as a % of all jobs	34.2% <sup>6</sup>	35.9% <sup>6</sup>	37.3%
Wages - direct	\$235,135,000 <sup>6</sup>	\$321,906,300 <sup>6</sup>	\$429,203,460
Tourism wages as a % of all wages	29.6% <sup>6</sup>	30.7% <sup>6</sup>	33.1%
Tourism's % of retail sales	32.5% <sup>6</sup>	32.8% <sup>6</sup>	35.6%
TDT	\$1,351,649	\$1,740,008	\$5,122,458
Lodging expenditures	\$67,582,450	\$87,000,420	\$128,061,450
Room nights	428,873	558,189	648,960
Occupancy	59.6%	53.5%	62.2%
Average Daily Rate	\$132.17	\$163.30	\$197.53
RevPAR	\$78.77	\$87.35	\$122.69
Nassau County population	57,663	71,571	78,444

Sources: 2000 – AITDC and Downs & St. Germain Research; 2008 – Haas Center, University of West Florida, AITDC and Downs & St. Germain Research; 2015 – AITDC and Downs & St. Germain Research.

### Direct Expenditures From Visitors To Amelia Island

Visitors spent **\$565,326,400** in 2015 at Amelia Island restaurants, grocery stores, hotels, gift shops, convenience stores, pizza shops, jewelry stores, attractions, golf courses, beach vendors, fast food restaurants, women's clothing stores, shoe stores, art galleries, engineering firms, medical centers, toy stores, gas stations, condominiums, men's clothing stores, architects, electronics stores, athletic stores, bars, music stores, bedding stores, big box stores, home decorators, spas, beauty salons, consultants, you name it!

All visitors include those staying in paid accommodations, visitors staying with friends and relatives (VFRs), and those coming only for the day to shop, watch an event, go to an attraction, eat, go to the beach, etc. (day trippers). For all visitors to Amelia Island, spending on accommodations and restaurants far exceeded expenditures in other categories.

<sup>5</sup> Spending data for visitors who stayed overnight in paid accommodations were collected by Amelia Island TDC. Spending data for day trippers and visitors who stayed with friends and relatives was estimated by Downs & St. Germain Research.

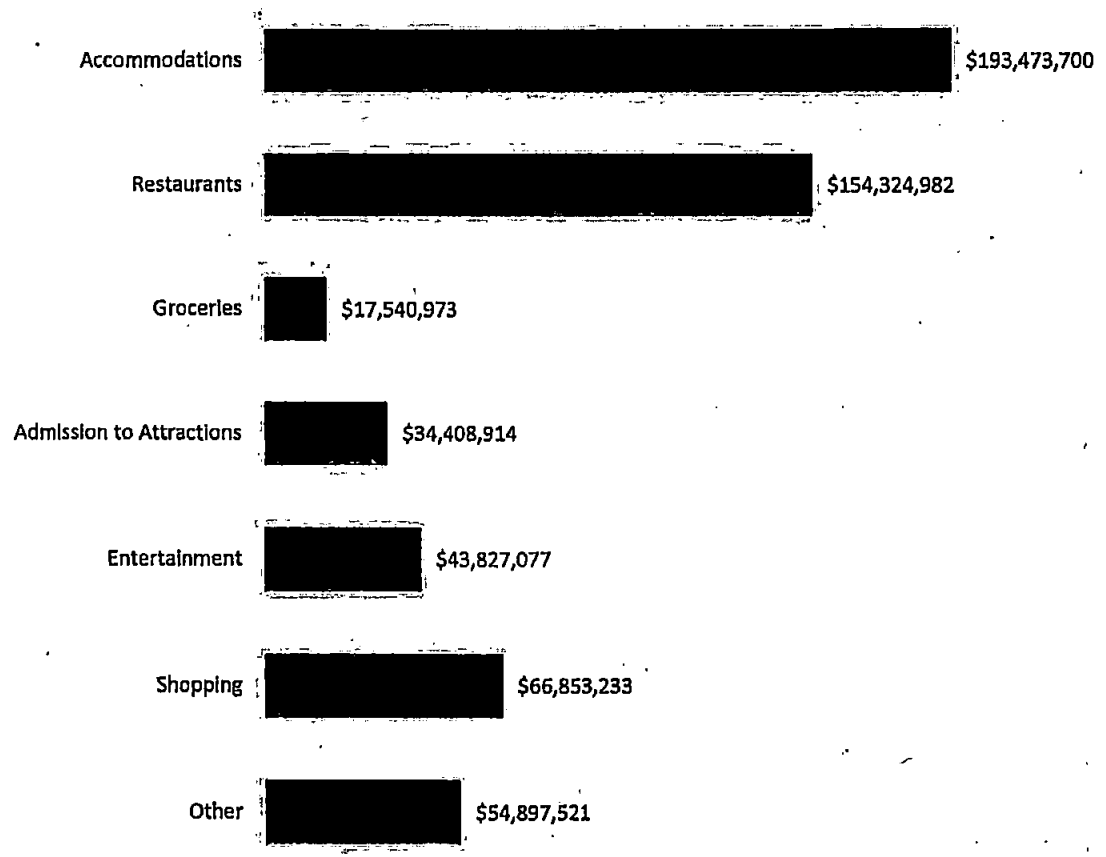
<sup>6</sup> All jobs-related and wages-related data for 2000 and 2008 were normalized to reflect the visitors-to-jobs ratio established in 2015 and to reflect Downs & St. Germain Research's "Comparative Spending" Approach for determining the impact of tourism (see page 82 in the Appendix).

<sup>7</sup> Downs & St. Germain Research count not just jobs that are within Bureau of Labor Statistics categories such as "Leisure & Hospitality" or Tourism, we count jobs from all industry sectors that directly or indirectly emanate from tourism, e.g., engineers who help engineer hotels; architects who design second homes that are rented via Airbnb to visitors; retail associates who sell clothes to visitors; bankers who finance hotels or housing for visitors, etc.

<sup>8</sup> Indirect jobs are created based on induced and indirect spending by visitors.

**FIGURE 3**  
**All Visitors to Amelia Island**  
**Spending in Nassau County - 2015\***

**Total: \$565,326,400**



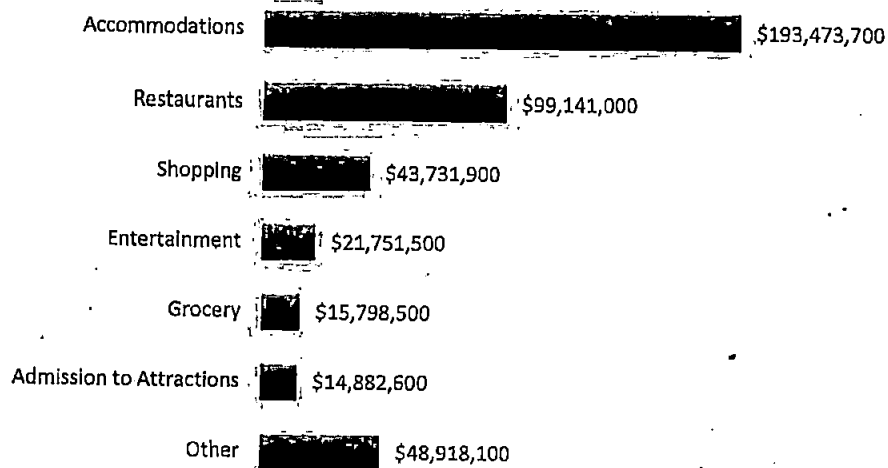
**All Visitors Vs. Visitors Staying In Paid Accommodations**

AITDC traditionally tracks spending from visitors who stay in paid accommodations. While this is a critical visitor segment, it gives only a partial description of the economic impact of visitors to Amelia Island. The following graph focuses only on spending by visitors to Amelia Island who stayed overnight in paid accommodations. Comparing the graph on the next page to Figure 3 above brings the difference in tracking all visitors vs. tracking only visitors who stay in paid accommodations into focus.

\* Sources: AITDC and Downs & St. Germain Research.

**FIGURE 4**  
**Visitors to Amelia Island Staying in Paid Accommodations:**  
**Spending in Nassau County - 2015<sup>10</sup>**

**Total: \$437,697,300**



Accommodations represent the greatest expenditure category (\$193,473,700). While money visitors paid for occupancy based on TDT collections was \$128.1 million ( $\$128,061,450 = \$5,122,458/.04$ ), visitors reported paying much more for accommodations. Based on surveys with visitors to Amelia Island in 2015, visitors reported spending \$193,473,700 on accommodations in Amelia Island.

The discrepancy between the amount spent on accommodations as calculated from the Tourist Development Tax (\$128.1 million) and what visitors report spending on accommodations (\$193.4 million) is a result of food served at restaurants within hotels, meetings at resorts, and other hotel-related fees that are not subject to TDT. Hence, it is understandable that visitors reported paying more for accommodations in Amelia Island than would be justified based solely on the Tourist Development Tax.

**Visitor Spending Vs. Spending By Local Residents<sup>11</sup>**

Based on surveys of visitors to Amelia Island in 2015, it has been documented that all visitors to Amelia Island spent at least \$565,326,400 in Nassau County during that 12-month period. Using data supplied by the U.S. Census, it is estimated that local residents of Amelia Island spent \$470,080,200 or about \$45,000 per household in Nassau County. Other residents of Nassau County spent \$551,164,700 or about \$30,500 per household in Nassau County in 2015.

<sup>10</sup> Sources: AITDC and Downs & St. Germain Research.

<sup>11</sup> Spending in Nassau County is divided into spending by visitors to Amelia Island and spending by local residents of Nassau County. A portion of local resident spending can be attributed to people who live in other counties and work in Nassau County and people merely passing through Nassau County on highways.

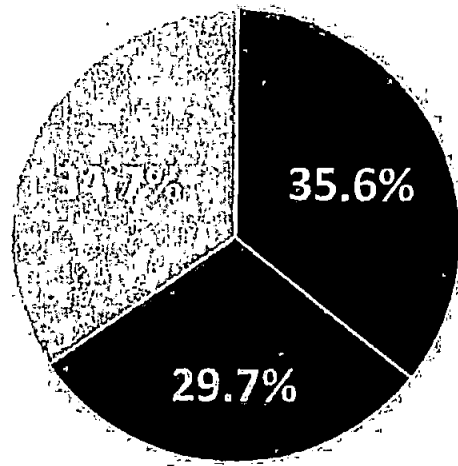
**FIGURE 5**  
**Local vs. Resident Spending in Nassau County**

Spending in Nassau County	Dollar Amount	Percentage
Amelia Island visitors	\$565,326,400	35.6%
Amelia Island residents	\$470,080,200	29.7%
Other Nassau County residents	\$551,164,700	34.7%
<b>Total spending in Nassau County</b>	<b>\$1,586,571,300</b>	<b>100.0%</b>

Hence, visitors to Amelia Island accounted for 35.6% of all expenditures in Nassau County in 2015. That is, Nassau County's economic health would diminish by more than one-third without visitors to Amelia Island.



**FIGURE 6**  
**Spending by Visitors to Amelia Island; Residents of Amelia Island & Other Residents of Nassau County**



■ Visitors   ■ Amelia Island Locals   □ Nassau County Locals

Sources: U.S. Census, Downs & St. Germain Research, and the Amelia Island TDC.

### **Total Economic Impact From Visitors To Nassau County**

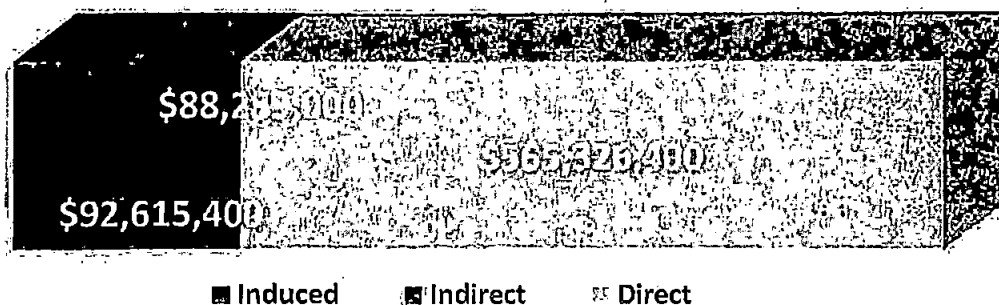
Each dollar spent by an Amelia Island visitor in Nassau County has a greater than face value impact on the local economy. Visitors' spending has induced and indirect multiplier effects, which are explained in detail in the full body of this report. In essence, money that comes into a local economy is spent again when local employees spend wages earned via visitors' dollars and local businesses purchase supplies and merchandise for their companies from dollars that visitors spend at their establishments.

Some economic impact studies use comparatively large multipliers. For example, Sarasota County from 2008 through 2014 used a multiplier of 1.89. In keeping with the goal of reporting a conservative estimate of the economic impact of visitors to Nassau County, this report will use a multiplier of 1.32, which is the multiplier that IMPLAN calculates for tourism in Nassau County<sup>12</sup>.

With direct spending by Amelia Island visitors of **\$565,326,400**, the total economic impact of visitors in Nassau County in 2015 was **\$746,230,800**.

<sup>12</sup>IMPLAN Economic Modeling, the most widely used modeling software for estimating the economic impact for destinations.

**FIGURE 7**  
**Total Economic by Amelia Island Visitors**  
**\$746,230,800**



**Number Of Visitors To Amelia Island<sup>13</sup>**

The number of visitors to Amelia Island has steadily increased over the past 15 years, nearly doubling since the beginning of the millennium. With just over 350,000 visitors staying in paid accommodations in 2000, there were nearly 620,000 visitors staying in paid accommodations in 2015. Likewise, the total number of visitors (including day trippers and those staying with friends and relatives) has increased commensurately. When considering not only visitors staying in paid accommodations, but also visitors from outside Nassau County who stay with friends and relatives (VFRs) and visitors from outside Nassau County who attend events and attractions, shop at local stores, go to the beach, etc. (day trippers), the total number of visitors to Amelia Island in 2015 was 1,297,900. This figure compares to only 755,400 total visitors in 2000 and 982,500 in 2008.

**FIGURE 8**  
**Number of Visitors to Amelia Island**

Visitors to Amelia Island	2000	2008	2014	2015
Staying in paid accommodations	359,121	467,404	566,600	618,200
Total visitors <sup>14</sup>	755,400	982,500	1,191,700	1,297,900

Amelia Island has not traditionally tracked VFRs and day trippers. The number of VFRs and day trippers for Amelia Island were estimated based on modeling data from other destinations in Florida in which Downs & St. Germain Research conducts studies, plus factoring in activity by individuals who do not register to pay TDT, but rent their second and primary houses, condos, etc., via Airbnb, VRBO, and other online services. In 2015, it was estimated that VFRs totaled 197,500 and day trippers totaled 482,200.

<sup>13</sup> Sources: Amelia Island TDC, University of West Florida, Haas Center and Downs & St. Germain Research.

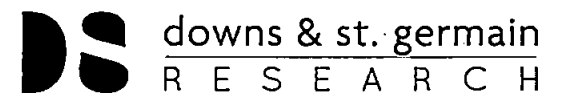
<sup>14</sup> Number of total visitors in 2015 was based on AITDC's number of visitors who stayed in paid accommodations + estimates of the number of visitors staying with friends and relatives and the number of day trippers provided by Downs & St. Germain Research based on normative data from other destinations in Florida. The ratio of the number of visitors staying in paid accommodations to the total number of visitors in 2015 was applied to data in 2000, 2008, and 2014.



# Ocala/Marion County VCB

ADR Study & Visitor Tracking Report:  
April - June, 2nd Quarter 2018

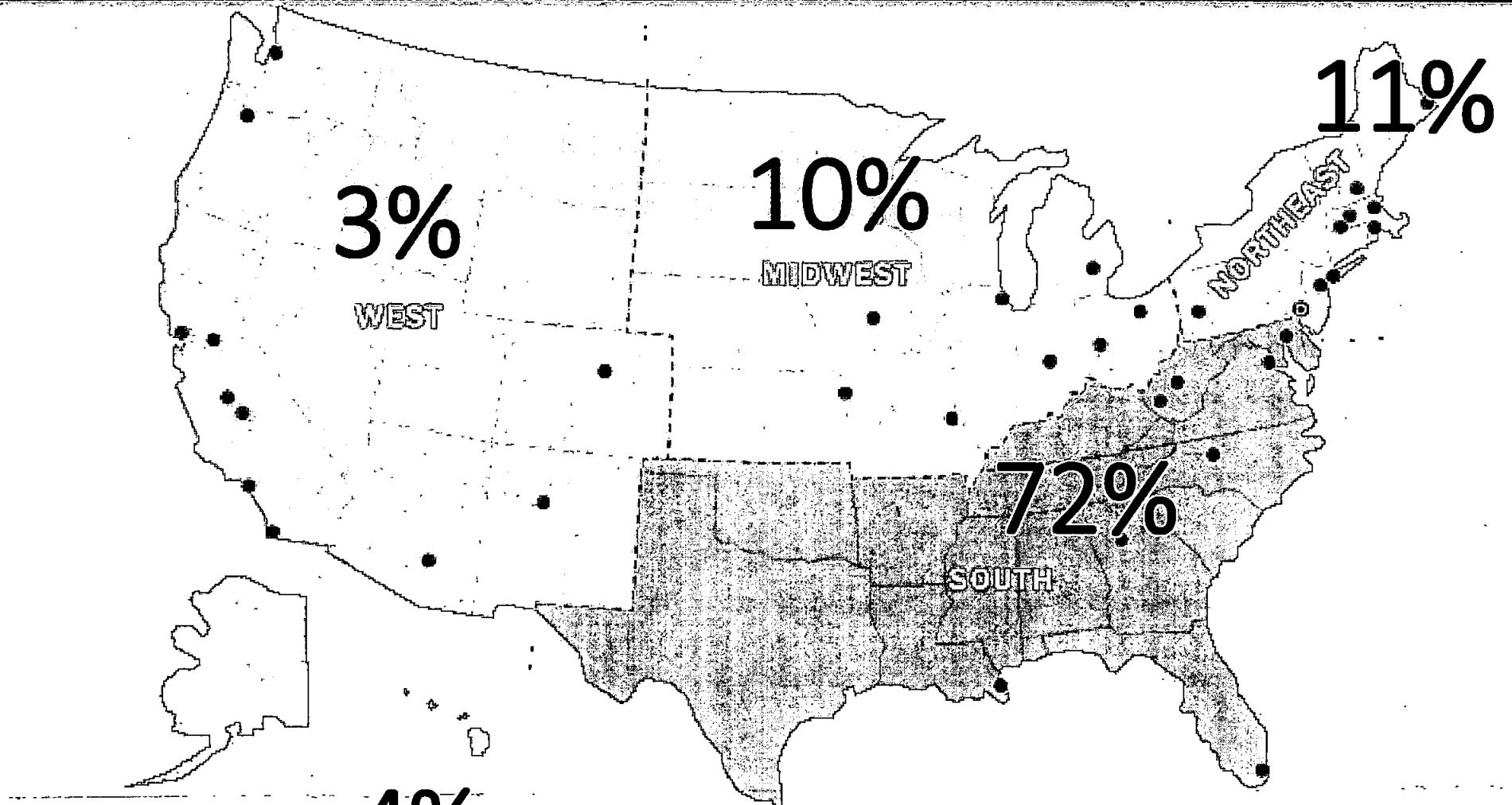
Joseph St. Germain, Ph.D.  
Phillip Downs, Ph.D.  
Rachael Anglin  
Isiah Lewis  
Downs & St. Germain Research



# Executive Summary



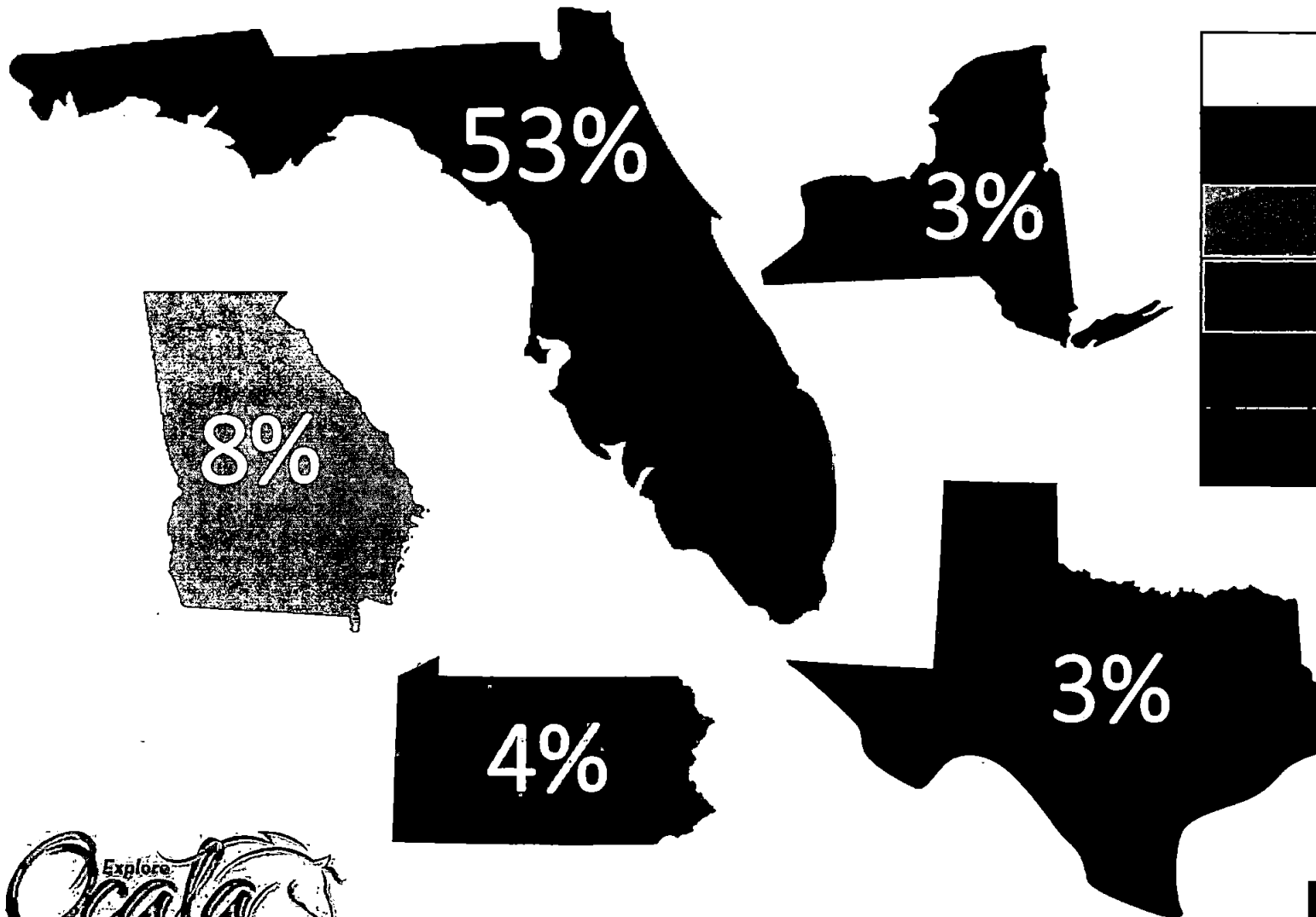
# Origin of Visitors



4% of visitors were from outside the U.S.

# Origin of Visitors

71% of visitors were from 5 states

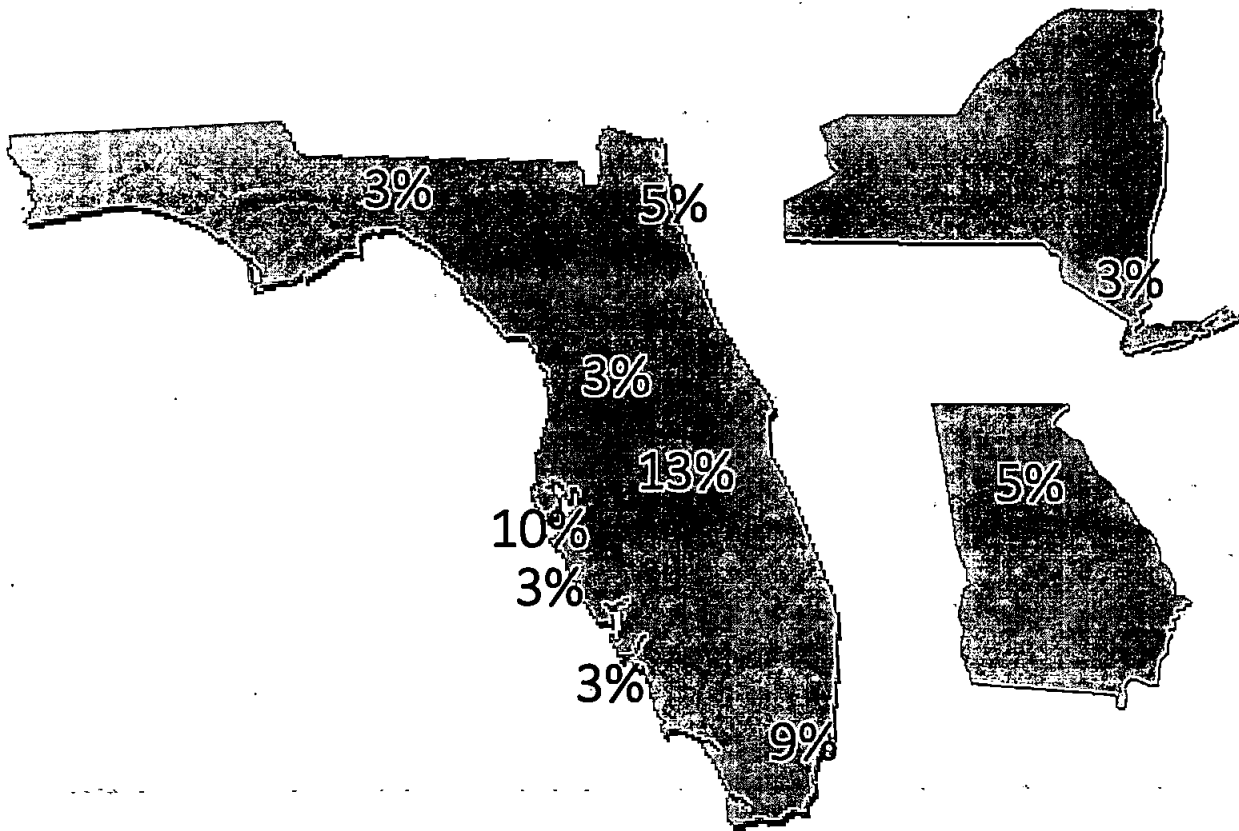


Top 5 States
Florida
Georgia
Pennsylvania
New York
Texas



# Origin of Visitors

57% of visitors were from 10 U.S. markets



Top 10 Markets
Orlando
Tampa-Clearwater-St. Petersburg
Miami-Ft. Lauderdale
Atlanta
Jacksonville
Tallahassee
Naples-Ft. Myers
Sarasota-Bradenton
New York City
Citrus/Sumter/Lake Counties

# Overnight Visitors' Accommodations

71% Hotel/motel



24% Family/friend's residence



3% Personal second home



1% Campsite/campground/RV



1% Rental house/condominium



# Travel Parties

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The typical visitor  
traveled in a party  
composed of 2.7 people

28% traveled with at least  
one person 18 or under in  
their travel party

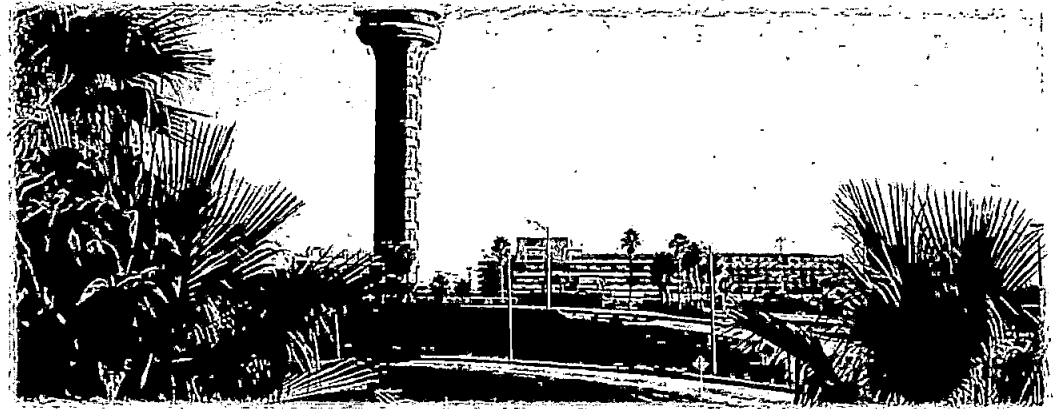


# Transportation

89% of visitors drove to  
Ocala/Marion County



9% of all visitors flew in via Orlando  
International Airport

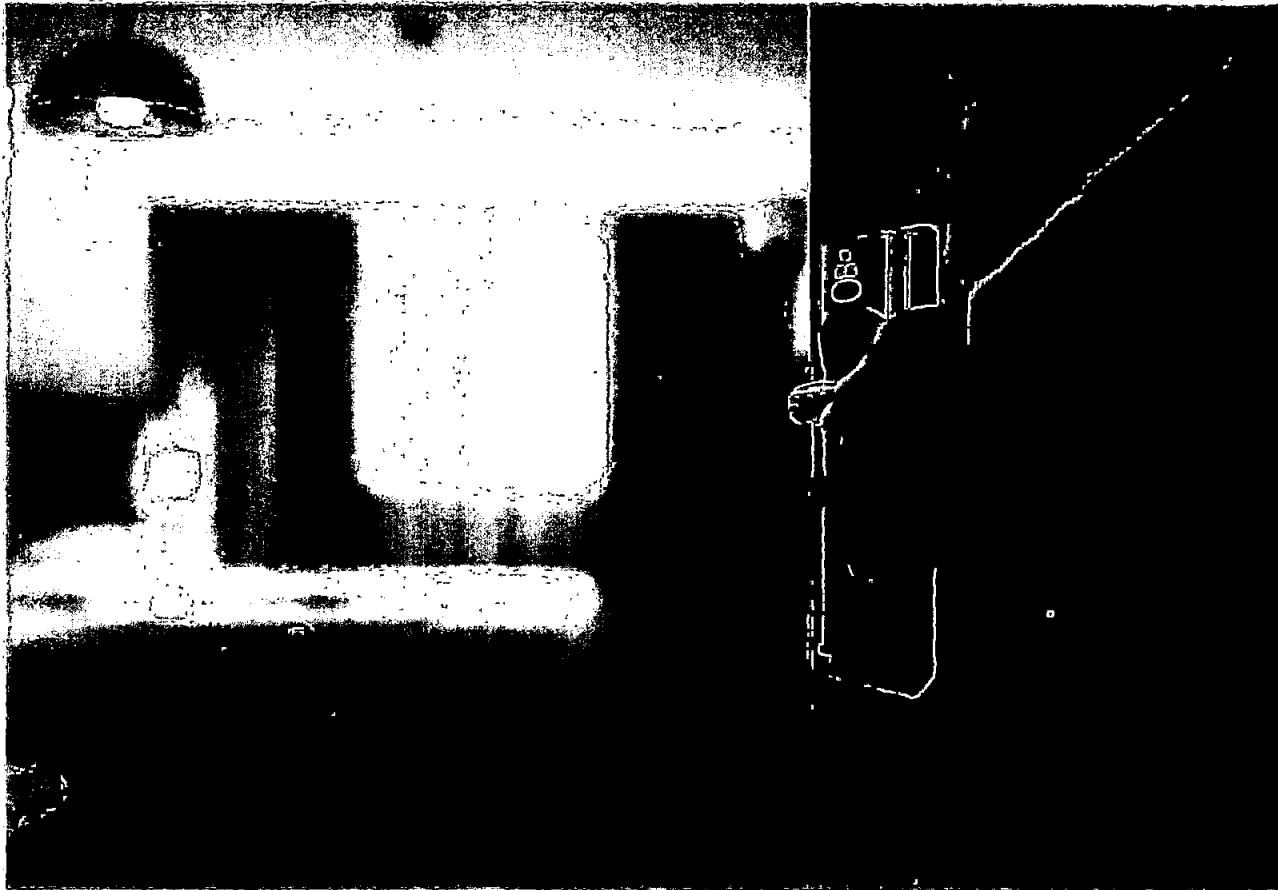


2% of all visitors flew in via Tampa  
International Airport



# Length of Stay

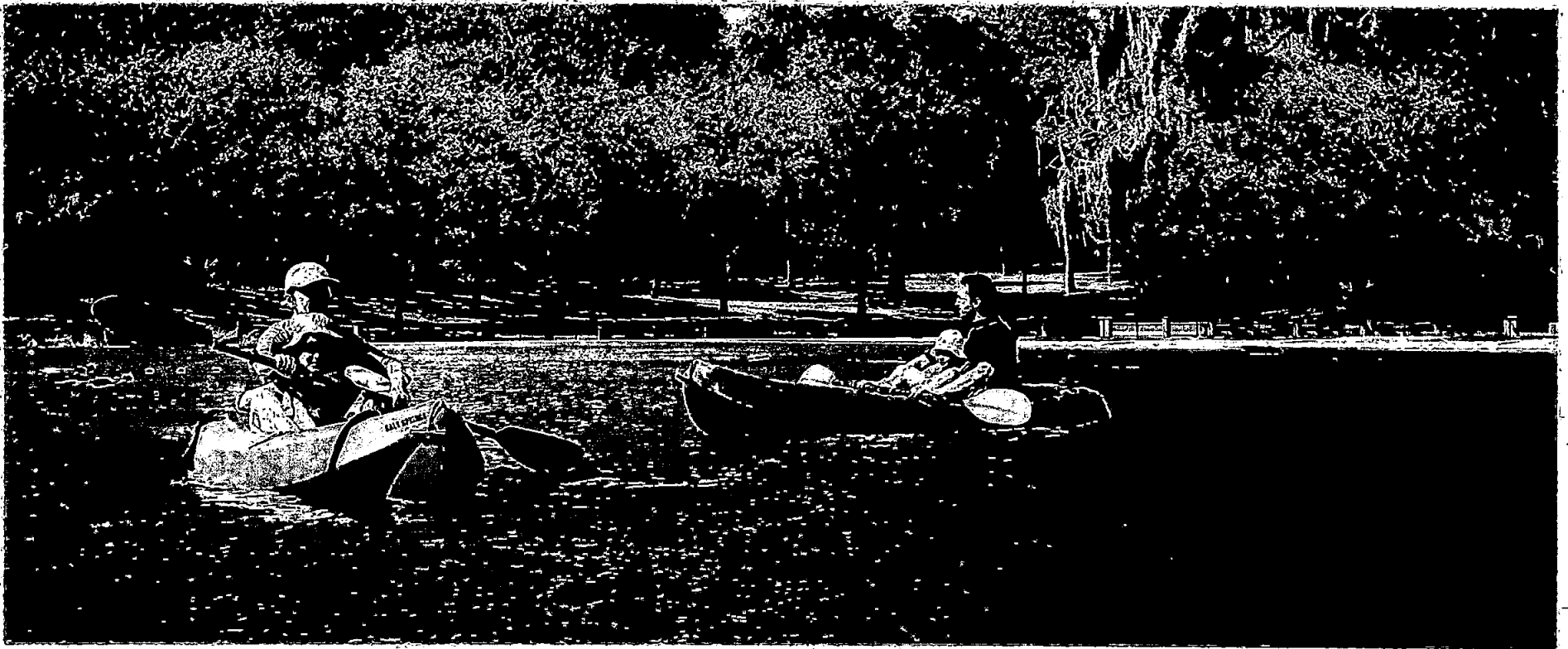
→ Visitors spent 2.6<sup>1</sup> nights in Ocala/Marion County



<sup>1</sup>When including visitors who stayed longer than 1 month, average nights stayed is 3.3 nights.

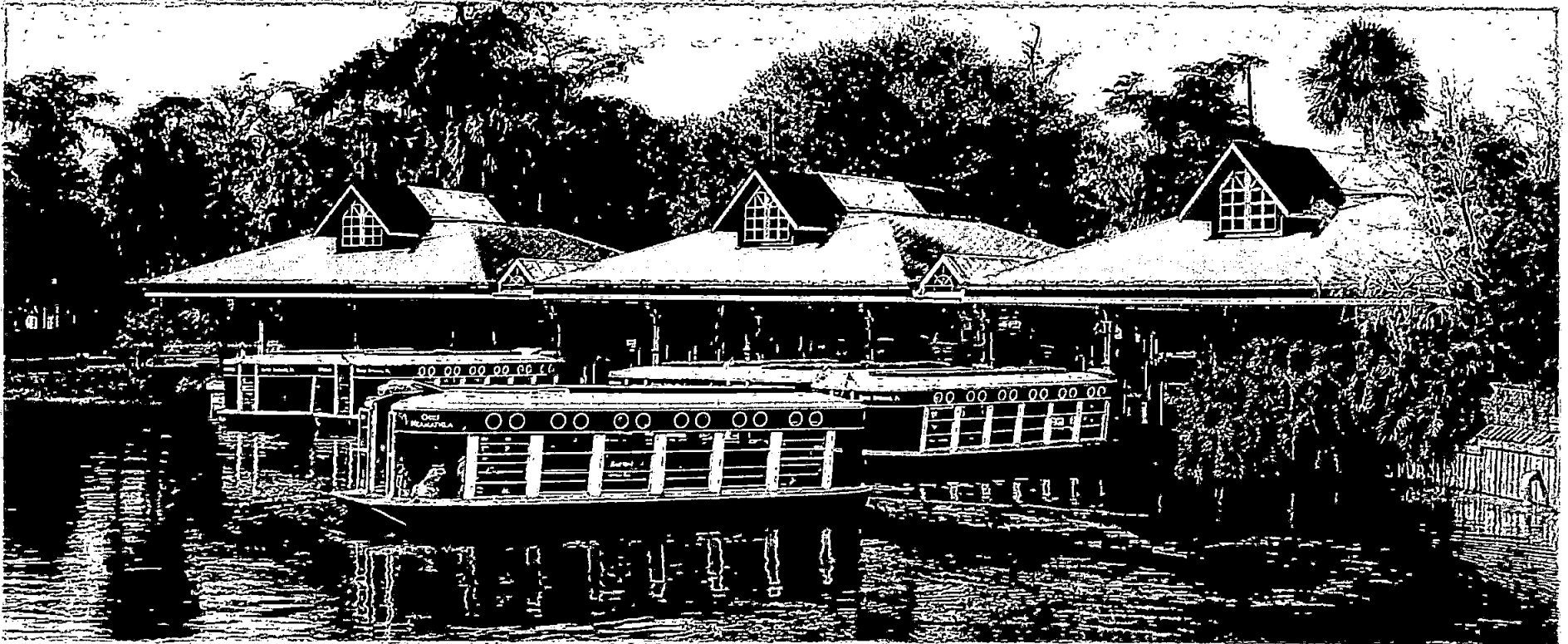
# Visitation

- 36% were first time visitors
- 11% had visited more than 10 times



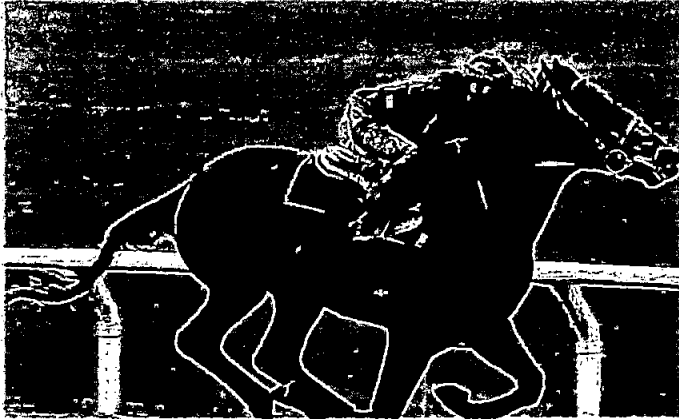
# Visitor Satisfaction

- 95% of visitors said their visit met or exceeded expectations
- 86% will recommend Ocala/Marion County to a friend
- 93% will return to Ocala/Marion County



# Top Reasons for Visiting\*

Horse-related event



Business



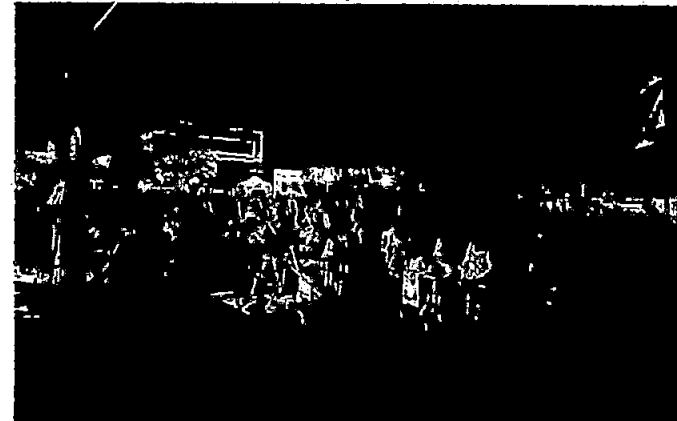
Attend/participate in a sporting event



Visit friends/family



Special event



# Top Activities During Visit\*

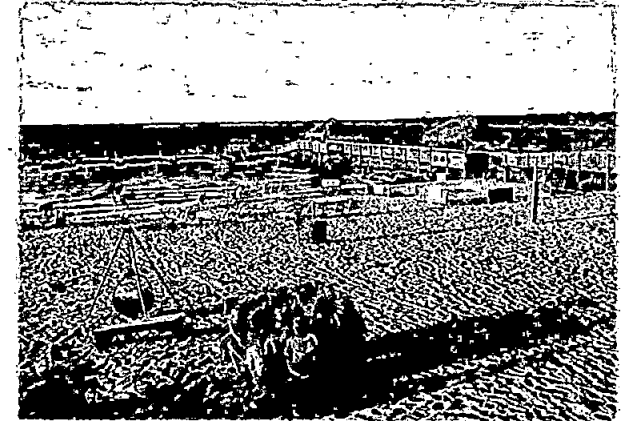
Dining out



Horse-related event



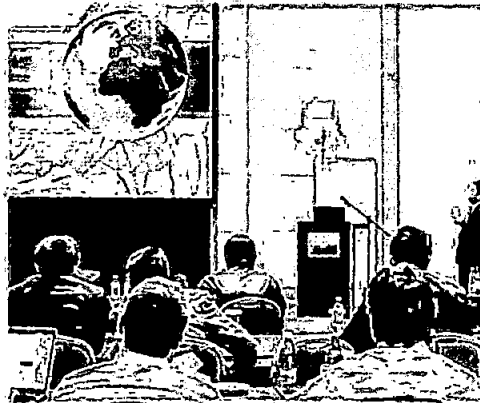
Visit friends/family



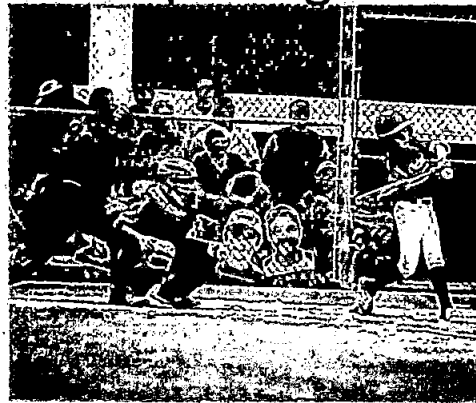
Relax & unwind



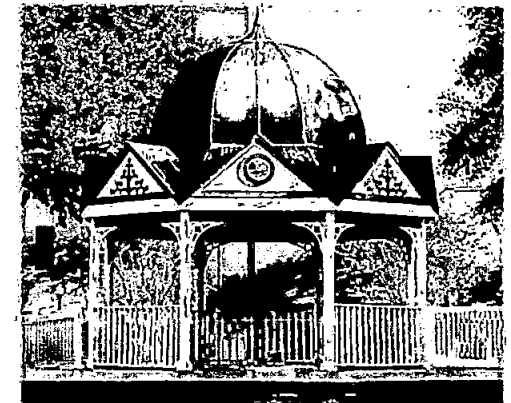
Business



Attend/participate in a sporting event



Visit Downtown Ocala



# Quadrant Analysis

## Done Infrequently & Exceeds Expectations

Nature, environment, bird watching  
Biking, hiking, running  
Canoeing, kayaking, tubing  
Golf, tennis

## Done Often & Exceeds Expectations

Visit friends & family  
Horse related event  
Visit area springs  
Attractions  
Sporting events

## Done Infrequently & Meets/Below Expectations

Art galleries, museums  
Shopping, antiquing  
Bars & nightclubs

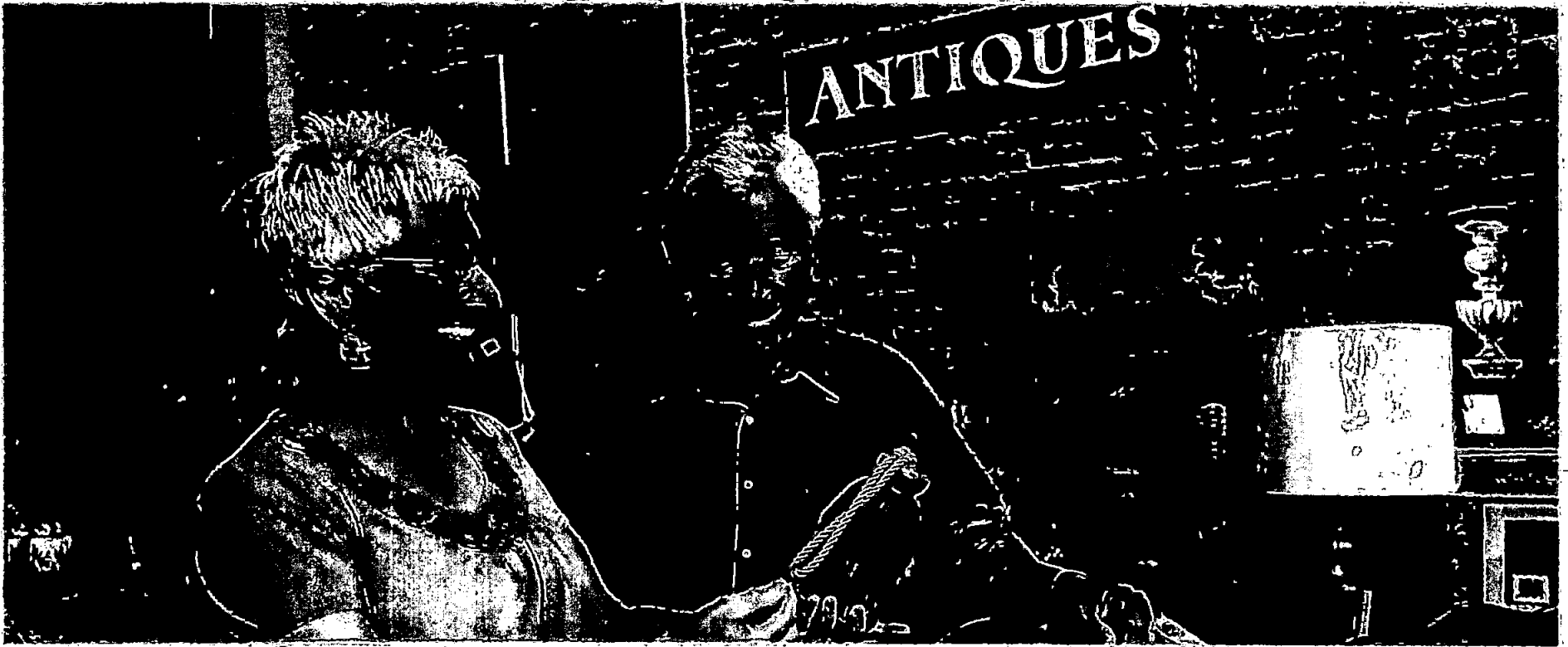
## Done Often & Meets/Below Expectations

Business  
Relax & unwind  
Visit downtown Ocala  
Restaurants



# Travel Party Spending

→ Travel parties spent \$874 on their trip to Ocala/Marion County



# Demographics

## → The typical Day Trip Visitor:

- Was 54 years old
- Had a median household income of \$50,000
- Was male (55%)
- Spent \$211 on their trip
- Drove to Ocala/Marion County (100%)
- 23% traveled with children
- Was from:
  - Orlando (42%)
  - Tampa-Clearwater-St. Petersburg (18%)



# Demographics

→ The typical Vacationer<sup>1</sup> Visitor:

- Was 52 years old
- Had a median household income of \$68,100
- Was male (63%)
- Stayed in Ocala/Marion County for 3.5 nights
- Spent \$1,204 on their trip
- Drove to Ocala/Marion County (79%)
- 16% traveled with children
- Was from:
  - Florida (44%)
  - Southeast (18%)
  - Northeast (15%)



<sup>1</sup>Travel parties who stayed 1-10 nights.



# Demographics

→ The typical Long-Term<sup>1</sup> Visitor:

→ Was 53 years old

→ Had a median household income of \$69,900

→ Was male (57%)

→ Stayed in Ocala/Marion County for 19.2 nights

→ Spent \$6,520 on their trip

→ Drove to Ocala/Marion County (53%)

→ 20% traveled with children

→ Was from

→ Southeast (33%)

→ Northeast (23%)

→ International (23%)

<sup>1</sup>Travel parties who stayed more than 10 nights.

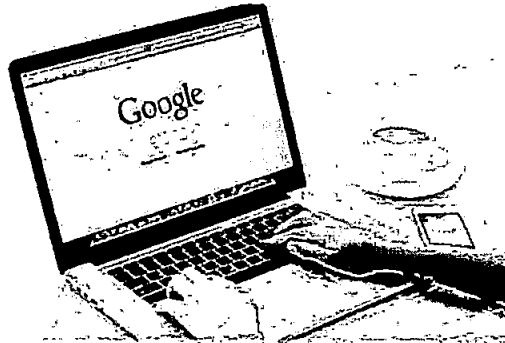
# Trip Planning

- 55% of visitors planned their trip less than 1 month in advance
- Top trip planning sources:

Friends and family



Search on Google



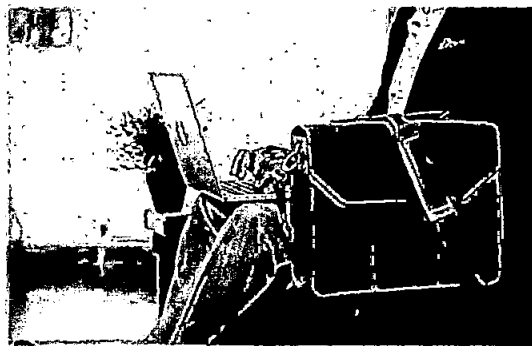
Hotel/resort websites



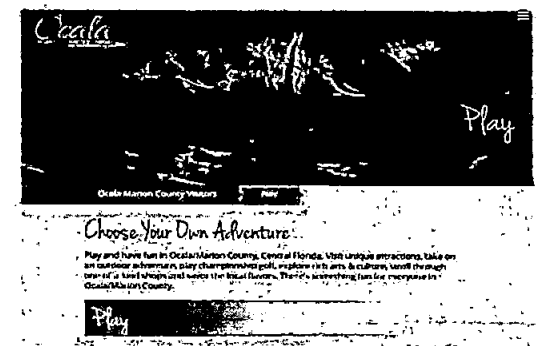
Flight/hotel websites



Booked through work



OcalaMarion.com

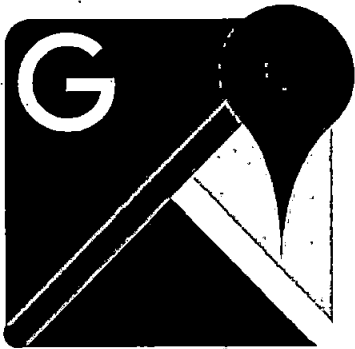


# Resources Used in Market

→ 7% of visitors accessed ocalamarion.com while in market

→ Top types of trip planning resources used while in market:

Navigation sites/apps



Talked to locals



Restaurant sites/apps



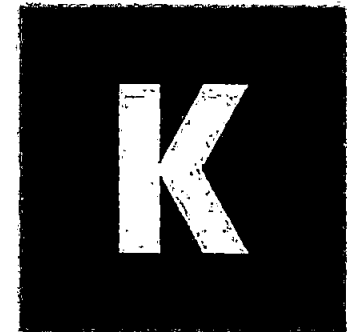
Destination social media



Hotel/resort brand sites/apps  
(Best Western, IHG etc.)

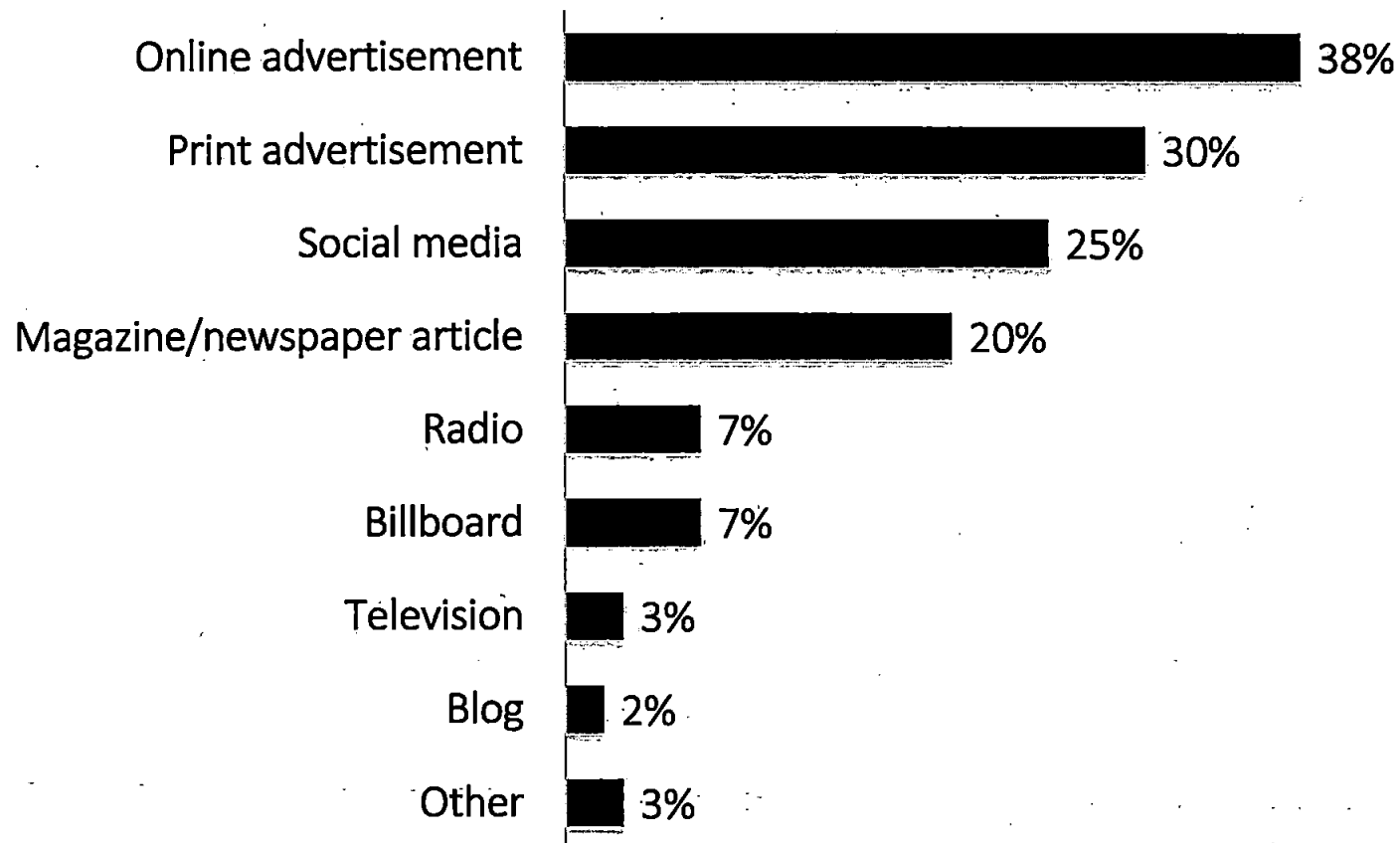


Online travel agency sites/apps  
(Kayak, Expedia, etc.)



# Ocala/Marion County Promotions\*

- 20% of visitors have recently seen, read, or heard advertising promotions about Ocala/Marion County in the following formats:



\*Multiple responses permitted



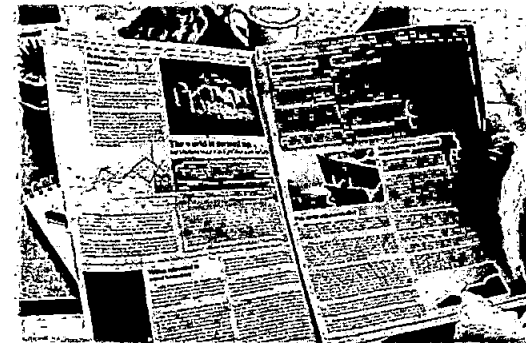
# Advertising and Promotions

- 20% of visitors have seen, read, or heard advertisements or promotions about the Ocala/Marion County area
- Sources for advertisements and promotions:

Online advertisement



Print advertisement



Social media



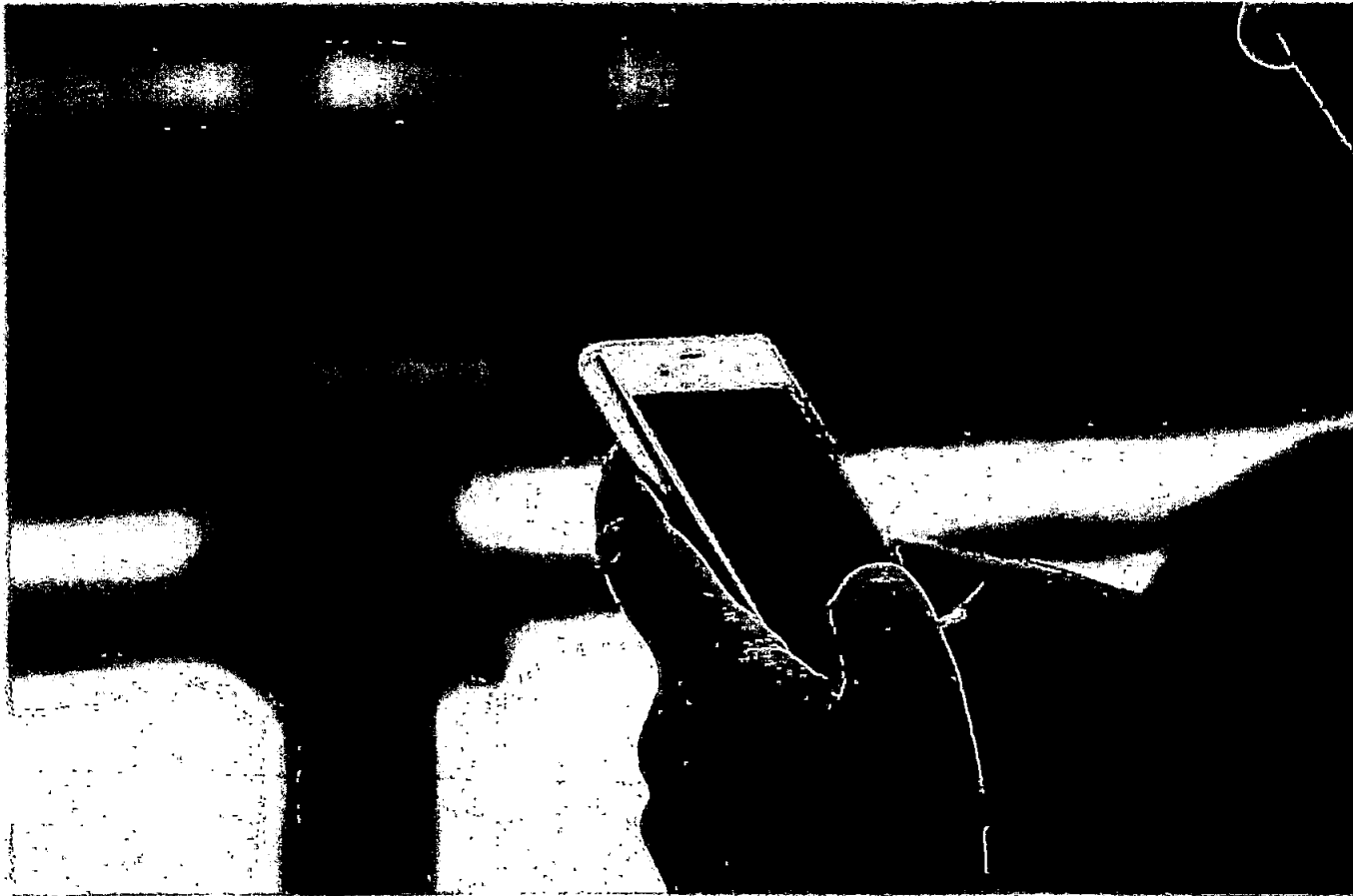
Magazine/newspaper article



# Smartphone Usage

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→ 65% of visitors used their smartphone to plan their trip or get around while they were visiting Ocala/Marion County



# Visitors Guide and Visitors Center

- 2% of visitors requested a Visitors Guide before visiting Ocala/Marion County
- 1% of visitors stopped at the Visitors Center during their trip



# Descriptions of Ocala/Marion County



## Beautiful

“It is such a beautiful place with amazing weather, beautiful nature, friendly folks, and a lot to do.”



## Relaxing

“Ocala is great place for a vacation; it is relaxing, quiet, friendly and beautiful. I can't ask for more.”



## Charming

“This town is very charming and we love the rural life like the farms, the food, the nature, and the springs.”

**REQUEST FOR PROPOSALS (RFP) NO: 18-81**  
**SJC TOURISM MARKET RESEARCH AND ECONOMIC IMPACT STUDY**

**Full Legal Company Name: Downs & St. Germain Research, Inc.**

**ATTACHMENT "5-A"**

**PROJECT APPROACH/METHODOLOGY**

To assist evaluators in reviewing this proposal, this section will be formatted following the elements of PART III: GENERAL SERVICES, C. SCOPE OF SERVICES.

**Task 1 – Familiarization and development of survey and methodology**

**Preliminary Meeting.** Downs and St. Germain Research will meet, **in-person**, with representatives of St. Johns County to confirm goals and timeline of the project. We have developed a process called "Backgrounding" that we use with all willing clients. During our in-person Backgrounding we will:

- Discuss research goals to ensure that all of St. Johns County's goals are incorporated into the research process.
- Explore strategic uses of data generated through the research to ensure that the research methodology captures all relevant data
- Discuss political and organizational issues that may be relevant to the research so potential obstacles can be avoided
- Review concerns and preferences among St. Johns County staff regarding data collection approaches, reporting formats, etc., to ensure that the final process and product reflects the interests of St. Johns County as well as the professional experience and expertise of Downs & St. Germain Research.

**Interview Key Stakeholders.** Joseph St. Germain, Ph.D., and/or Phillip Downs, Ph.D., will meet personally with TDC board members, St. Johns County staff, and industry leaders to gather their input regarding the research goals and methodology to ensure that the final products reflect the needs of these critical stakeholders.

**Study Content.** The RFP includes the following data requirements:

- Estimate total overnight capacity for visitors
- Estimate total number of visitors, broken-down by type of visitor
- Create a visitor profile by type of visitor
- Establish and assess annual and seasonal tourism trends
- Assess economic impact of tourism

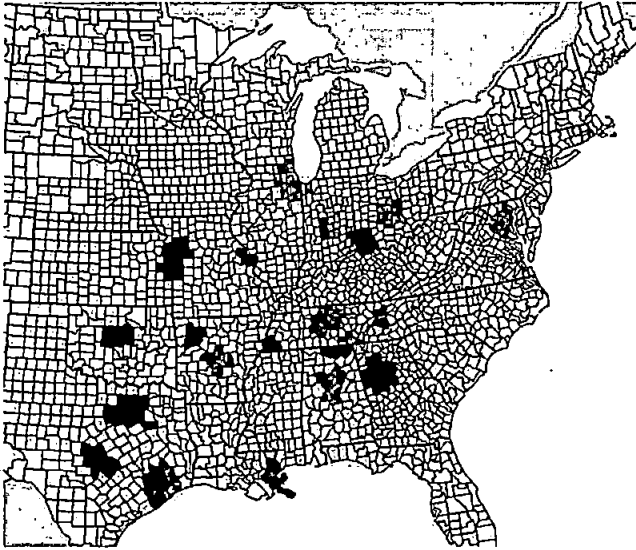
Our proposed methodology will capture these data requirements plus the following if County officials desire:

- Mode of transportation
- Origin markets
- Travel party size
- Reason for visiting St. Johns County
- If St. Johns County is the primary or secondary destination
- Travel party composition
- Traveling with children
- Nights stayed in St. Johns County
- Number of visits to St. Johns County
- Overall evaluation of experience in St. Johns County
- Activities enjoyed while in St. Johns County
- Area in St. Johns County where visitor stayed
- Areas within St. Johns County where visitors visited
- Type of lodging
- Lifestyle and generational segmentation of visitors to St. Johns County
- Importance of vacation attributes to visitors to St. Johns County
- Visitors' ratings of their experience in St. Johns County along vacation attributes that are important to them
- Gap analysis that shows the difference between the importance that visitors place on vacation attributes and ratings they give their experience in St. Johns County along these same attributes.
- Visitor spending by category
- Information sources used
- Trip planning window
- Awareness of St. Johns County TDC marketing
- What additional attractions, events, etc., would make experiences in St. Johns County more enjoyable
- GIS maps that graphically demonstrate origin markets with
  - The highest potential
  - The most spending by visitors in St. Johns County
  - Percentage of visitors by origin market who fly (or drive) to St. Johns County
  - Length of stay by origin market
  - Awareness of TDC advertising by origin market

Other GIS maps can be generated as long as the data are in the questionnaire. That is why the Backgrounding phase where we discuss content is so important to the success of the study.

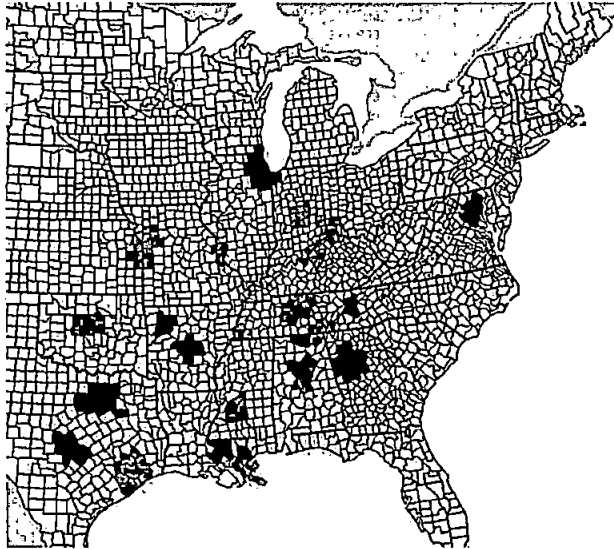
Examples of a couple GIS maps are shown on the following page.

## Spending/Trip



Market	Mean
Fayetteville, AR	\$ 11,958
Huntsville	\$ 11,881
Cincinnati	\$ 10,547
Austin	\$ 9,322
Kansas City	\$ 8,507
Oklahoma City	\$ 8,040
St. Louis	\$ 7,577
Dallas Ft. Worth	\$ 6,931
Atlanta	\$ 6,737
Memphis	\$ 6,521
Nashville	\$ 6,441
Birmingham	\$ 6,424
Houston	\$ 6,422
Indianapolis	\$ 6,418
Washington DC-Baltimore	\$ 6,368
Knoxville	\$ 6,209
Little Rock	\$ 6,022
Columbus, OH	\$ 6,015
Chicago	\$ 6,006
New Orleans	\$ 5,179
Chattanooga	\$ 5,145
Louisville	\$ 4,869
Jackson	\$ 3,746
Montgomery	\$ 3,015
Baton Rouge	\$ 2,919
Pensacola-Mobile	\$ 2,658

## Median Household Income



Market	Median Income
Austin	\$ 271,900
Dallas-Ft. Worth	\$ 197,200
Chicago	\$ 192,900
Baton Rouge	\$ 192,300
Washington DC-Baltimore	\$ 190,000
Little Rock	\$ 180,400
Fayetteville, AR	\$ 179,000
Atlanta	\$ 177,500
Houston	\$ 173,100
Indianapolis	\$ 169,400
Kansas City	\$ 164,000
Oklahoma City	\$ 150,000
Nashville	\$ 145,800
Huntsville	\$ 145,700
Knoxville	\$ 145,500
New Orleans	\$ 144,600
Jackson	\$ 143,800
Memphis	\$ 138,900
Birmingham	\$ 137,100
St. Louis	\$ 136,500
Cincinnati	\$ 135,000
Louisville	\$ 134,600
Chattanooga	\$ 130,800
Columbus, OH	\$ 128,600
Pensacola-Mobile	\$ 124,900
Montgomery	\$ 75,000

**Task 2 – Data Collection**

Downs & St. Germain Research recommends the following multimodal data collection process. Each data collection method has strengths and weaknesses – together they produce cost-efficient, valid data from visitors to St. Johns County.

Data Collection Method	Advantages	Disadvantages
<b>In-person intercept surveys.</b> Downs & St. Germain Research’s interviewers will canvass the County using iPads to interview visitors.	Using a stratified, random sampling process, this method is the <b>most valid and reliable</b> for collecting data on all types of visitors, day trippers, VFRs, and those staying in paid accommodations.	This is the most expensive data collection method.
<b>Email surveys sent directly</b> to guests of hotels and vacation rental properties.	This approach can produce valid results for visitors <b>IF</b> enough hotels and vacation rental properties and attractions participate.	Hotels, vacation rental properties, and attractions are reluctant to provide email addresses or to even send turn-key email surveys produced by Downs & St. Germain Research. To incentivize properties and attractions, we permit them to include up to three of their own questions in the TDC survey and we offer them a free report on the results.
<b>Direct visitors to URLs containing email surveys.</b> Postcards and/or business cards can be distributed at properties and attractions.	This approach is less expensive.	Response rates to this methodology have fallen dramatically over the past five years.
<b>Distribute a survey URL in person to visitors throughout the county.</b>	This approach will reach a representative sample of visitors	Response rates to this methodology have fallen dramatically over the past five years.

All data collection methods produce higher response rates and thus produce more valid data if financial incentives are given to visitors. Financial incentives are not part of the budget in this proposal, but are welcome if St. Johns County has funds to offer them. Any assistance by St. Johns County staff in distributing materials with survey URLs is also welcomed.

Whether or not St. Johns County offers incentives or assists in distributing the survey URL, **Downs & St. Germain Research will engage in all four of the data collection methods listed above.**

**Sampling Plan**

A sampling plan that enables data collection from a representative and valid set of visitors is critical to the success of St. Johns County’s research.

**Our approach is based on access to different types of visitors and different places where they go during different times of the year.**

- Monthly collection (at least one week per month)

- At or via accommodations (hotels, motels, vacation rental properties, campgrounds)
- At public spaces (e.g., beaches, Sawgrass Village, Guana St. Park, Outlet Malls, City Marina, Mission parking lot, Pier Park, Micklers Landing, etc.)
- At attractions (St. Augustine Wild Reserve, St. Augustine Lighthouse & Maritime Museum, Castillo de San Marcos, St. Augustine Pirate & Treasure Museum, etc.)
- At events (golf & tennis events, concerts, festivals, etc.)

The important factor in designing data collection is to ensure that a venue, attraction, event, etc., that is critical for bringing visitors to the county is included in the data collection design. Data collection should be conducted monthly to capture a representative set of all types of visitors.

It is also critical that the data collection design not bias critical estimators such as the percentage of people who stay in paid accommodations vs those who do not.

### ***Conclusion – Downs & St. Germain Research’s Data Collection Approach***

It is important to note that the sampling frame for interviews consists of all out-of-county visitors to St. Johns County whether they stay at paid accommodations or not, or whether they spend the night or not.

We plan to interview **visitors** at key times throughout the year when they come to St. Johns County. We will reach them at hotels, vacation rental properties, events, attractions and public places. We will reach a representative set of day visitors and visitors who stay with friends and relatives by interviewing them at events, attractions, and public places. Our data collection approach also has the potential to reach all visitors who stay in paid lodging.

Our multi-modal data collection approach will:

- Reach a more representative set of visitors
- Reach more visitors
- Produce more valid results with lower margins of error (sampling errors)
- Save St. Johns County money.

### **Interviewing**

While not all interviews with visitors will be in-person, this data collection approach is the backbone of our data collection process because of the unassailable validity of this approach. A very important component of personal interviews is the interviewers.

#### **1. Hiring correct interviewers**

Rachael Anglin, Senior Project Director, is responsible for overseeing our data collection process. In the past 4 years, Anglin has managed over 200 interviewers in 20 locations around the state of Florida. In part because of Anglin’s quality control over data collection, the Florida Sports Foundation in conjunction with Major League Baseball selected Downs & St. Germain Research to collect data across 15 ball parks in Florida this year to document the economic impact of MLB Spring Training on the state.

#### **2. Training interviewers**

Every interviewer reads materials on interviewing prepared by Dr. Downs when he taught Survey Research at Florida State University. Then every interviewer is trained by one of our interviewer supervisors. Then they role play with one another practicing interviewing. Then they conduct test interviews with individuals from the sample as they are being observed by a supervisor. Then they are permitted to conduct “real” interviews.

### **3. Developing a sampling plan**

Dr. Downs or Dr. St. Germain develop all of our sampling plans – their Ph.D. training coupled with designing over 1,000 sampling plans serves them well in this task. We have developed sampling plans based on probability samples, non-probability samples, quota samples, Latin Square designs, multistage designs, stratified and cluster sampling, simple and systematic random sampling plans.

### **4. Scheduling interviewers**

For St. Johns County we will use a multistage, stratified, random sampling plan where the phase 1 strata are geographic location, type of property, and attraction/event; and phase 2 strata are time of day, day of week, and day of month. Here is one example of how interviewers will be instructed: Interviewer “A” will go to St. Augustine Beach on Tuesday, October 3<sup>rd</sup> from 1 p.m. to 5 p.m. She will start on the beach side, count to 10 and approach the nearest person to her. During her shift, she will walk north along the beach, taking approximately 1 to 2 minutes between interviews. Each time, she will count to 10, then approach the person nearest her for an interview.

### **5. Supervising interviewers**

All interviewers will be supervised their first day, and on randomly selected days thereafter.

### **6. Equipping interviewers with appropriate hardware & software**

All interviewers carry iPads with the questionnaire programmed. They all follow a dress code and wear a name badge that identifies them with Downs & St. Germain Research (or with St. Johns County, if preferred).

### **7. Data Collection Experience & Bandwidth.**

In the past two years, Downs & St. Germain Research has:

- Conducted over 15,000+ intercept surveys in the State of Florida for 10 clients
- Placed interviewers in 15 destinations
- Fielded 50 interviewers
- Collected data at 20 hotels, 3 airports, 3 beach areas, 25 attractions, 15 baseball stadiums, 75+ events

### **8. Validating each interviewer’s data**

Data from each interviewer is analyzed separately and subjected to a model that we develop that seeks out unusual responses.

### **9. Converting data to a master file**

All interviewers’ data is aggregated in a master file by Rachael Anglin.

### **10. Cleaning and checking data**

Isiah Lewis will apply error checking routines to data to check for out of range or unusual data.

### **11. Analyzing data**

Drs. Downs and St. Germain will analyze the data.

### **12. Checking analyses for “face” validity**

Given their experience and exposure to so many data sets, Drs. Downs and St. Germain perform an additional analysis to examine data for validity.

## **Task 3 – Evaluation and Reporting**

Downs & St. Germain Research has three Ph.D.s whose statistical and analytical expertise and experience is second to no other research firm conducting tourism research in the country.

### **Economic Impact Analysis & Reporting**

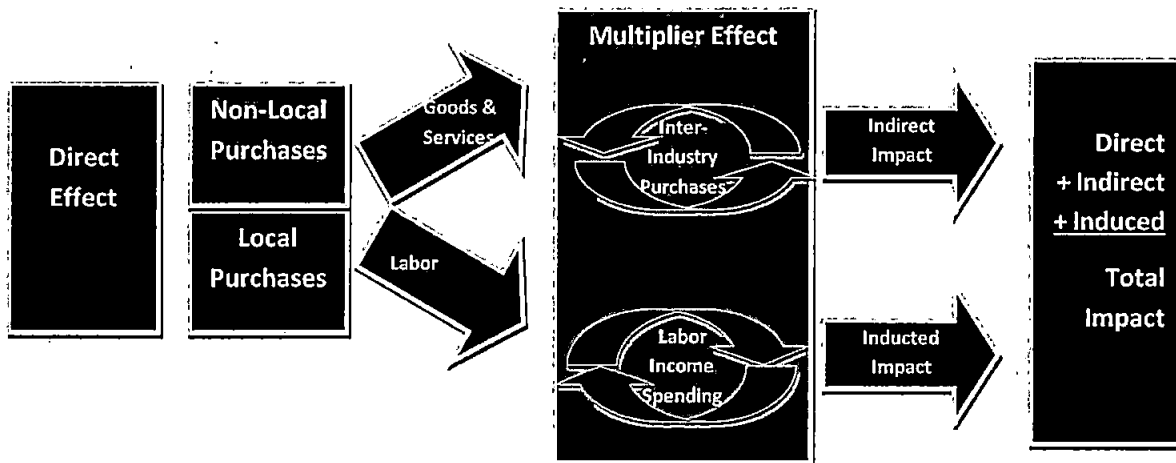
To determine the total economic impact of tourism on St. Johns County’s economy, Downs & St. Germain Research will use IMPLAN since it is one of the accepted models (along with REMI and

RIMS II) and most DMOs use it. It should be noted that all three of these economic models use the US Department of Commerce Input-Output tables as a primary foundation.

Evidence of IMPLAN's validity is the fact that the US Bureau of Economic Analysis, the Federal Reserve Bank, and the Environmental Protection Agency are a few of its customers.

IMPLAN is an input-output model that takes direct effect (direct expenditures, which will emanate from surveys Downs & St. Germain Research conducts) and generates additional economic impacts within St. Johns County. The following is a graphic depiction of input-output modeling.

**Input-Output Modeling: Conceptual Overview**



The direct effects (expenditures) from tourism in St. Johns County are fed into the model. The direct effect is divided into two types of local purchases:

1. Purchases that will generate additional economic impacts within the St Johns County and
2. Purchases that leave St. Johns County's economy or are retained through savings and investments. Purchases that generate additional economic impacts cover a wide range of economic activity, but we will offer the following for illustrative purposes.

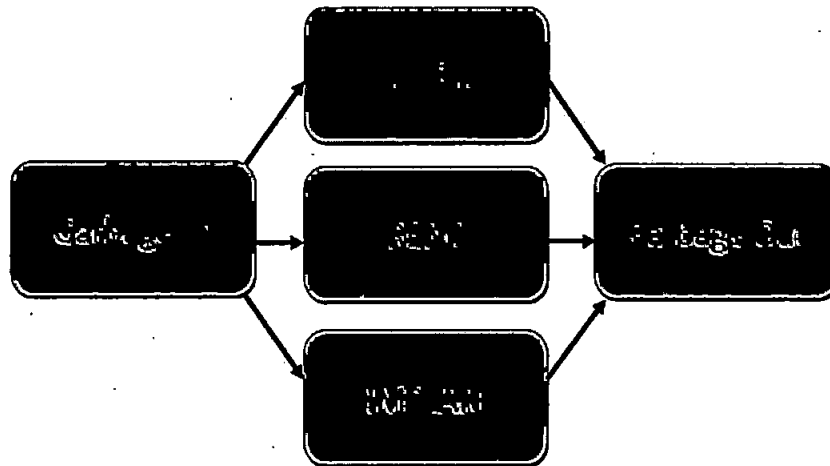
A restaurant that serves visitors to St. Johns County purchases kitchen supplies from a local company, purchases paper products from a local company, purchases uniforms from a local company, and purchases cleaning services from a local company. Each round of inter-industry purchases generates fewer local effects until all of the money originally spent leaks out of the St. Johns County's economy.

This process is referred to as the multiplier effect. Wages for employees of the restaurant work through the local economy in the same fashion. The induced (from labor spending) and indirect (from inter-

industry spending) effects combine with direct effects (actual dollars spent by visitors in St. Johns County) to produce the total economic impact of visitors on St. Johns County's economy.

*It also should be noted that these economic models are only as good as the data that are input into the modeling process.* The data fed into the model will be generated through Downs & St. Germain Research's unique multi-modal data collection design explained elsewhere in this proposal. The use of professional interviewers rather than students and interns is another quality enhancement that Downs & St. Germain Research will bring to data integrity and validity.

### Economic Impact Models



#### **Economic models cannot overcome compromised data.**

Downs & St. Germain Research's professional interviewers and our state-of-the-art multi-modal data collection approach will ensure valid visitor expenditure data for input into economic models that are used to estimate the economic impact of tourism in St. Johns County.

### Visitor Profile Reporting

We continually search for ways to reveal results to TDC staff, commissioners, the media, etc. that encourage make data accessible rather than intimidating or boring. We have included samples of our reports earlier in this proposal. We tailor report style to each client's needs.

### Unique Data Analysis

Downs & St. Germain Research will provide the County with strategic recommendations based on sophisticated multivariate statistical models. Through analytics such as Structural Equation Modeling (SEM) and AnswerTree, we will identify drivers of decisions to visit St. Johns County and

share this information with the County's agency of record so advertising dollars can be spent more effectively.

No other firm provides the level of **sophisticated analysis coupled with marketing experience** gained working with Fortune 500 companies, international and national associations, and federal, state and local governments. Our combination of attributes translates into value-added strategic recommendations for the County.

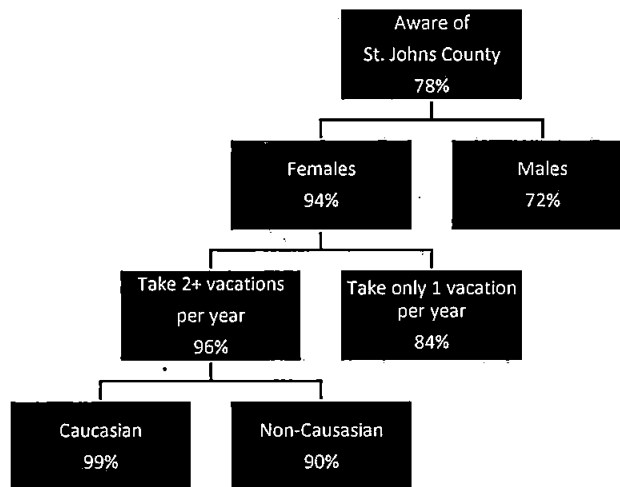
Given three doctoral degrees on staff, Downs & St. Germain Research possesses a full range of multivariate statistical techniques. We use factor analysis and discriminant analysis to help clients discover the most profitable market segments. We use multidimensional scaling to develop brand positioning maps that show how clients are positioned among competitors and show how clients' brands are positioned vis-à-vis brands from competitors.

We will illustrate a few of the sophisticated analyses that can be applied to the County's survey results.

### AnswerTree Analysis

AnswerTree analysis can identify the characteristics/variables that are most likely to predict a particular behavior or perception. The diagram below shows a mock AnswerTree analysis that looks at awareness of a St. Johns County as a beach destination.

### MOCK ANSWERTREE DIAGRAM – AWARENESS OF ST. JOHNS COUNTY AS A VACATION DESTINATION



### *Interpretation of AnswerTree Diagram*

Based on the surveys, nearly four out of five potential visitors (78%) are aware of St. Johns County as a vacation destination. Gender is the number one predictor of whether or not individuals are aware of St. Johns County as females are more likely to be aware (94%). The second most powerful predictor of whether or not one is aware of St. Johns County is the number of vacations taken per year as residents who take two or more vacations and are female (96%) are more likely to be aware

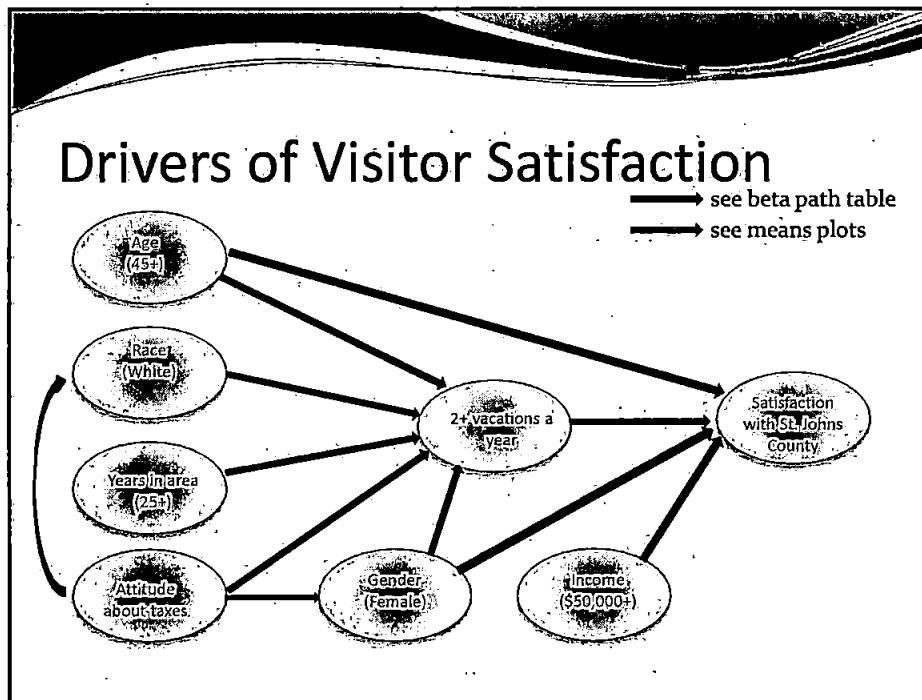
of St. Johns County. The third most powerful predictor of whether or not one is aware of St. Johns County is race as Caucasians, who take two or more vacations and are female are more likely (99%) to be aware of St. Johns County.

Armed with the results of the AnswerTree analysis, our client can tailor its future services and messages to reinforce understanding among segments that already are aware of St. Johns County and segments that are not aware.

### Structural Equation Modeling

Structural Equation Modeling determines what variables drive behaviors and perceptions.

As shown in the figure on the next page, the main predictors of satisfaction with visiting St. Johns County were 1) age (45+), 2) gender (females), 3) take 2+ vacations per year, and 4) income (\$50,000+). Several other factors influence many of the primary drivers of satisfaction with visiting St. Johns County.



Armed with this information, St. Johns County's advertising agency would know which market segments were more likely to visit and could thus target more advertising to these segments.

**REQUEST FOR PROPOSALS (RFP) NO: 18-81  
SJC TOURISM MARKET RESEARCH AND ECONOMIC IMPACT STUDY**

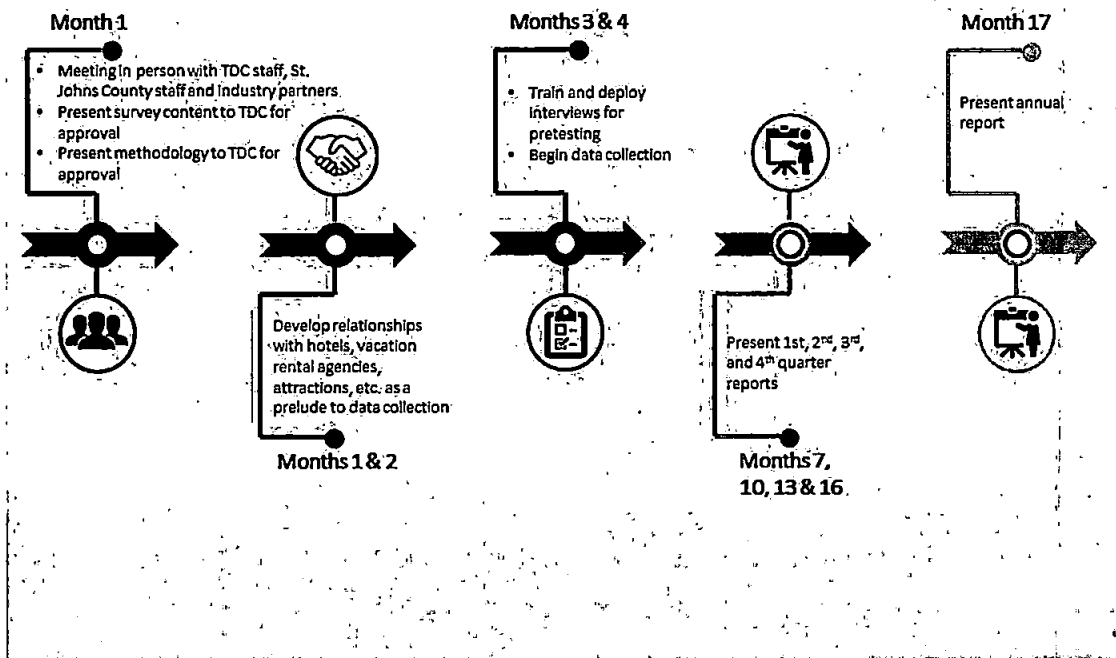
**ATTACHMENT "5-B"**

**PROPOSED SCHEDULE/TIMELINE FOR IMPLEMENTATION OF DELIVERABLES**

Deliverables and key steps in the research process include the following:

- Meeting in person with TDC staff, St. Johns County staff and industry partners
- Present survey content to TDC for approval
- Present methodology to TDC for approval
- Develop relationships with hotels, vacation rental agencies, attractions, etc., as a prelude to data collection
- Train and deploy interviews for pretesting
- Begin data collection
- Present 1<sup>st</sup> quarter report
- Present 2<sup>nd</sup> quarter report
- Present 3<sup>rd</sup> quarter report
- Present 4<sup>th</sup> quarter report
- Present annual report

**Timeline for Implementation of Deliverables**



**REQUEST FOR PROPOSALS (RFP) NO: 18-81**  
**SJC TOURISM MARKET RESEARCH AND ECONOMIC IMPACT STUDY**

**Full Legal Company Name: Downs & St. Germain Research, Inc.**

**ATTACHMENT "6-A"**

**PROJECT STATUS REPORT**

(Complete and Submit, include projects in progress or anticipated within next 12 to 24 months)

1. **Name of Project:** Tourism research  
Project Description: Visitor tracking, focus groups, economic impact, etc.  
Location: Walton County  
Owner Name: Visit South Walton  
Start Date/Anticipated Start Date: On-going      Scheduled Completion Date: September 2020
  
2. **Name of Project:** Tourism research  
Project Description: Visitor tracking, economic impact, etc.  
Location: Sarasota County  
Owner Name: Visit Sarasota County  
Start Date/Anticipated Start Date: On-going      Scheduled Completion Date: September 2020
  
3. **Name of Project:** Tourism research  
Project Description: Visitor tracking, economic impact, etc.  
Location: Leon County  
Owner Name: Visit Tallahassee  
Start Date/Anticipated Start Date: On-going      Scheduled Completion Date: September 2021
  
4. **Name of Project:** Tourism research  
Project Description: Visitor tracking, focus groups, etc.  
Location: Polk County  
Owner Name: Visit Central Florida  
Start Date/Anticipated Start Date: On-going      Scheduled Completion Date: September 2020
  
5. **Name of Project:** Tourism research  
Project Description: Event data collection  
Location: Hillsborough County  
Owner Name: Visit Tampa Bay  
Start Date/Anticipated Start Date: On-going      Scheduled Completion Date: September 2019

6. **Name of Project:** Tourism research  
 Project Description: Visitor tracking, focus groups, etc.  
 Location: Pasco County  
 Owner Name: Visit Pasco County  
 Start Date/Anticipated Start Date: On-going      Scheduled Completion Date: September 2021
  
7. **Name of Project:** Tourism research  
 Project Description: Visitor tracking, economic impact, etc.  
 Location: Marion County  
 Owner Name: Ocala/Marion County VCB  
 Start Date/Anticipated Start Date: On-going      Scheduled Completion Date: September 2019
  
8. **Name of Project:** Tobacco Cessation Research  
 Project Description: Telephone interviewing  
 Location: Leon County  
 Owner Name: PDA Stats  
 Start Date/Anticipated Start Date: On-going      Scheduled Completion Date: December 2025
  
9. **Name of Project:** Medical research  
 Project Description: Internet survey  
 Location: Leon County  
 Owner Name: Capital Health Plan  
 Start Date/Anticipated Start Date: May 2018      Scheduled Completion Date: September 2018
  
10. **Name of Project:** Family research  
 Project Description: Internet surveys and focus groups  
 Location: Palm Beach County  
 Owner Name: Children's Services Council of Palm Beach County  
 Start Date/Anticipated Start Date: January 2018      Scheduled Completion Date: December 2018
  
11. **Name of Project:** Government research  
 Project Description: Internet surveys and focus groups  
 Location: Palm Beach County  
 Owner Name: City of Boynton Beach  
 Start Date/Anticipated Start Date: September 2018      Scheduled Completion Date: May 2019
  
12. **Name of Project:** Parks & Recreation research  
 Project Description: Internet surveys  
 Location: California  
 Owner Name: California Park & Recreation Society  
 Start Date/Anticipated Start Date: May 2018      Scheduled Completion Date: September 2018

**13. Name of Project:** Water research

Project Description: Internet and telephone surveys

Location: Hillsborough, Pinellas & Pasco counties

Owner Name: Tampa Bay Water

Start Date/Anticipated Start Date: June 2018

Scheduled Completion Date: September 2018

**REQUEST FOR PROPOSALS (RFP) NO: 18-81  
SJC TOURISM MARKET RESEARCH AND ECONOMIC IMPACT STUDY**

**ATTACHMENT "7-A"  
OFFICIAL PRICING PROPOSAL FORM**

**The following proposal is presented for:**

**SJC TOURISM MARKET RESEARCH AND ECONOMIC IMPACT STUDY**

**TOTAL PROPOSED AMOUNT \$ \$47,000  
(Cost of all deliverables)**

**Total Proposed Amount: Forty-Seven Thousand and xx/00  
(Amount Written in Words)**

Each Respondent shall insert the Total Proposed Amount in both numerals and words for services requested under this sealed RFP. If there is a discrepancy, the amount written in words shall prevail as the correct amount.

In the event of a discrepancy, the County shall calculate the Total Proposed Amount to determine the lowest, responsive, responsible Respondent.

Each Respondent shall submit the unit hourly rates per deliverable and total number of hours proposed in the table below. Hourly rates shall dictate the total proposed amount submitted on the Official County Pricing Proposal Form above. Failure to submit hourly prices for the identified deliverables may result in removal from consideration for award of a contract. The County also reserves the right to utilize the Hourly Rates submitted below for additional, as needed, services.

**PRICING PROPOSAL FORM**  
**ITEMIZED PRICING SCHEDULE FOR TASK DELIVERABLES**  
**HOURLY RATES PER DELIVERABLE**

<b>TASK/DELIVERABLE</b>	<b>HOURLY RATE</b>	<b>X</b>	<b>TOTAL # OF HOURS PROPOSED</b>	<b>=</b>	<b>TOTAL COST TO COUNTY</b>
<b>Task #1: Familiarization and Development of Survey and Methodology</b>					
Initial meetings	\$100		20		\$ 2,000
Survey development	\$100		20		\$ 2,000
Research design development	\$100		20		\$ 2,000
Develop relationships with industry partners	\$100		30		\$ 3,000
<b>Task #2: Data Collection</b>					
In-person interviews	\$40		600		\$24,000
Other data collection efforts	\$40		50		\$ 2,000
<b>Task #3: Evaluation and Reporting</b>					
Preparing quarterly reports	\$100		80		\$ 8,000
Preparing annual reports	\$100		20		\$ 2,000
Presenting reports and meetings	\$100		20		\$ 2,000
<b>TOTAL COST FOR ALL DELIVERABLES (TASK #S 1 – 3)</b>					<b>\$ 47,000</b>
*Total of itemized deliverables must equal Total Proposed Amount on previous page of the official Pricing Proposal Form					

REQUEST FOR PROPOSALS (RFP) NO: 18-81  
SJC TOURISM MARKET RESEARCH AND ECONOMIC IMPACT STUDY

ATTACHMENT "A"

AFFIDAVIT

TO: ST. JOHNS COUNTY BOARD OF COUNTY COMMISSIONERS  
ST. AUGUSTINE, FLORIDA

At the time the proposal is submitted, the Respondent shall attach to his proposal a sworn statement.

The sworn statement shall be an affidavit in the following form, executed by an officer of the firm, association or corporation submitting the proposal and shall be sworn to before a person who is authorized by law to administer oaths.

STATE OF Florida COUNTY OF Leon, Before me, the undersigned authority, personally appeared Joseph St. Germain who, being duly sworn, deposes and says he is (Title) of Resident, Downs + St. Germain P&P firm the respondent submitting the attached proposal for the services covered by the RFP documents for RFP No: 18-81, SJC Tourism Market Research and Economic Impact Study.

The affiant further states that no more than one proposal for the above referenced project will be submitted from the individual, his firm or corporation under the same or different name and that such respondent has no financial interest in the firm of another respondent for the same work, that neither he, his firm, association nor corporation has either directly or indirectly entered into any agreement, participated in any collusion, or otherwise taken any action in restraint of free competitive bidding in connection with this firm's proposal on the above described project. Furthermore, neither the firm nor any of its officers are debarred from participating in public contract lettings in any other state.

Downs + ST GERMAIN RESEARCH  
(Proposer)

By Joseph St. Germain  
President  
(Title)

STATE OF Florida  
COUNTY OF Leon

Subscribed and sworn to before me this 21 day of August, 2019, by Joseph St Germain who personally appeared before me at the time of notarization, and who is personally known to me or who has produced \_\_\_\_\_ as identification.

Rachael Anglin  
Notary Public



My commission expires:  
June 22, 2022

VENDOR ON ALL COUNTY PROJECTS MUST EXECUTE AND ATTACH THIS AFFIDAVIT TO EACH PROPOSAL.


REQUEST FOR PROPOSALS (RFP) NO: 18-81  
SJC TOURISM MARKET RESEARCH AND ECONOMIC IMPACT STUDY

ATTACHMENT "B"  
AFFIDAVIT OF SOLVENCY

PERTAINING TO THE SOLVENCY OF {insert entity name}, being of lawful age and being duly sworn I, {insert affiant name}, as {insert position or title} (ex: CEO, officer, president, duly authorized representative, etc.) hereby certify under penalty of perjury that:


1. I have reviewed and am familiar with the financial status of above stated entity.
2. The above stated entity possesses adequate capital in relation to its business operations or any contemplated or undertaken transaction to timely pay its debts and liabilities (including, but not limited to, unliquidated liabilities, unmatured liabilities and contingent liabilities) as they become absolute and due.
3. The above stated entity has not, nor intends to, incur any debts and/or liabilities beyond its ability to timely pay such debts and/or liabilities as they become due.
4. I fully understand failure to make truthful disclosure of any fact or item of information contained herein may result in denial of the application, revocation of the Certificate of Public Necessity if granted and/or other action authorized by law.

The undersigned has executed this Affidavit of Solvency, in his/her capacity as a duly authorized representative of the above stated entity, and not individually, as of this 21 day of August, 2018.

  
\_\_\_\_\_  
Signature of Affiant

STATE OF Florida )  
COUNTY OF Leon )

Subscribed and sworn to before me this 21 day of August, 2018, by Josiah St. Germain who personally appeared before me at the time of notarization, and who is personally known to me or who has produced \_\_\_\_\_ as identification.

  
Notary Public

My commission expires:  
JUNE 22, 2022



REQUEST FOR PROPOSALS (RFP) NO: 18-81  
SJC TOURISM MARKET RESEARCH AND ECONOMIC IMPACT STUDY

St. Johns County Board of County Commissioners

ATTACHMENT "C"

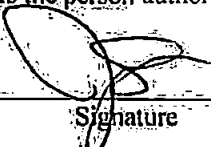
DRUG-FREE WORKPLACE FORM

The undersigned firm, in accordance with Florida Statute 287.087 hereby certifies that

Davis & St. Germain Research does:  
Name of Firm

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
2. Inform employees about the danger of drug abuse in the workplace, the business' policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, employee assistance programs and the penalties that may be imposed upon employees for drug abuse violations.
3. Give each employee engaged in providing the contractual services that are described in St. Johns County's request for proposals to provide bond underwriter services a copy of the statement specified in paragraph 1.
4. In the statement specified in paragraph 1, notify the employees that, as a condition of working on the contractual services described in paragraph 3, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty or nolo contendere to, any violation of Florida Statute 893, as amended, or of any controlled substance law of the United States or any state, for a violation occurring in the workplace no later than five (5) days after such conviction or plea.
5. Impose a sanction on, or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community by, any employee who is so convicted.
6. Consistent with applicable provisions with State or Federal law, rule, or regulation, make a good faith effort to continue to maintain a drug-free workplace through implementation of paragraphs 1 through 5.

As the person authorized to sign this statement, I certify that this firm complies fully with the above requirements.

  
\_\_\_\_\_  
Signature  
8 21 2018  
\_\_\_\_\_  
Date

REQUEST FOR PROPOSALS (RFP) NO: 18-81  
SJC TOURISM MARKET RESEARCH AND ECONOMIC IMPACT STUDY

ATTACHMENT "D"

St. Johns County Board of County Commissioners  
CONFLICT OF INTEREST DISCLOSURE FORM

Project (RFP) Number/Description: RFP No 18-81, SJC Tourism Market Research and Economic Impact Study

The term "conflict of interest" refers to situations in which financial or other considerations may adversely affect, or have the appearance of adversely affecting a consultant's/contractor's professional judgment in completing work for the benefit of St. Johns County ("County"). The bias such conflicts could conceivably impart may inappropriately affect the goals, processes, methods of analysis or outcomes desired by the County.

Consultants/Contractors are expected to safeguard their ability to make objective, fair, and impartial decisions when performing work for the benefit of the County. Consultants/Contractors, therefore must there avoid situations in which financial or other considerations may adversely affect, or have the appearance of adversely affecting the Consultant's/Contractor's professional judgement when completing work for the benefit of the County.

The mere appearance of a conflict may be as serious and potentially damaging as an actual distortion of goals, processes, methods of analysis or outcomes. Reports of conflicts based upon appearances can undermine public trust in ways that may not be adequately restored even when the mitigating facts of a situation are brought to light. Apparent conflicts, therefore, should be disclosed and evaluated with the same vigor as actual conflicts.

It is expressly understood that failure to disclose conflicts of interest as described herein may result in immediate disqualification from evaluation or immediate termination from work for the County.

Please check the appropriate statement:



I hereby attest that the undersigned Respondent has no actual or potential conflict of interest due to any other clients, contracts, or property interests for completing work on the above referenced project.



The undersigned Respondent, by attachment to this form, submits information which may be a potential conflict of interest due to other clients, contracts or property interests for completing work on the above referenced project.

Legal Name of Respondent:

Downs + St. Germain Research, LLC

Authorized Representative(s):

  
Signature

Joseph St. Germain, President  
Print Name/Title

  
Signature

Phillip Downs, Senior Partner  
Print Name/Title

RFP 18-81

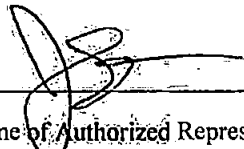
During the preparation of the RFP, the following addenda, if any, were received:

No.: 1 Date Received: 9.9.2018 No.: \_\_\_\_\_ Date Received: \_\_\_\_\_

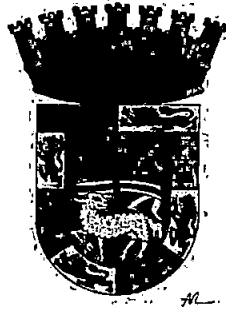
No.: \_\_\_\_\_ Date Received: \_\_\_\_\_ No.: \_\_\_\_\_ Date Received: \_\_\_\_\_

The undersigned declares that the statements and representations made in this proposal are true in every respect and that the said proposal is in all respects fair and made without collusion or fraud, and that no member of the Board of County Commissioners, or any other agent or employee of the County, directly or indirectly, is interested in this proposal or in any profits expected to accrue therefrom.

FULL LEGAL COMPANY NAME: Downs & St. Germain Research, Inc.  
MAILING ADDRESS: 2992 Habersham Drive Tallahassee, FL 32309  
MINORITY OR WOMAN OWNED BUSINESS: No  
FEDERAL ID OR SOCIAL SECURITY 59-2998952  
SIGNATURE OF AUTHORIZED REPRESENTATIVE

Joseph St. Germain   
(Type/Printed Name of Authorized Representative)

TITLE OF REPRESENTATIVE: President  
DATE OF SIGNATURE: 8.21.2018  
TELEPHONE NO.: 850.906.3111  
FAX NO.: 850.906.3112  
EMAIL ADDRESS: joseph@dsg-research.com



**ST. JOHNS COUNTY  
BOARD OF COUNTY COMMISSIONERS**

**RFP NO: 18-81  
REQUEST FOR PROPOSALS**

**ST. JOHNS COUNTY TOURISM MARKET RESEARCH AND  
ECONOMIC IMPACT STUDY**

St. Johns County Purchasing Department  
500 San Sebastian View  
St. Augustine FL 32084  
(904) 209-0150 – Main  
<http://www.sjcf1.us/Purchasing/index.aspx>

**FINAL: 7/24/2018**

**REQUEST FOR PROPOSALS (RFP) NO: 18-81**

**SJC TOURISM MARKET RESEARCH AND ECONOMIC IMPACT STUDY**

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**ST. JOHNS COUNTY, FL**

**RFP No: 18-81 SJC Tourism Market Research and Economic Impact Study**

**PART I: ADVERTISEMENT**

Notice is hereby given that St. Johns County, FL is soliciting proposals for **RFP No: 18-81 St. Johns County Tourism Market Research and Economic Impact Study**. Interested and qualified respondents may submit RFP Packages, according to the requirements described herein, to the St. Johns County Purchasing Department. **All RFP Packages are due by or before 4:00PM (EST) on August 23, 2018.** Any packages delivered to or received after the 4:00PM deadline will not be considered and shall be returned unopened to the addressee.

St. Johns County is soliciting proposals from qualified and experienced vendors specializing in economic based research to develop a data collection program, facilitate the collection of that data over a one-year period and complete a data analysis and economic impact study at the end of the data collection period. The project will focus on the St. Johns County tourism industry and shall address trends and shifts in visitation which occur throughout the year, the economic impact of tourism on the various sectors of the economy as well as a whole and the overall composition or profile of the day-use and overnight visitors. For the purpose of this project, visitor shall mean individuals who reside outside of the County limits and visit the county either overnight or for the day for recreation, holiday, business, medical, special events, etc.

RFP Packages are available for downloading from Onvia Demandstar, Inc., at their website [www.demandstar.com](http://www.demandstar.com), or by calling 800-711-1712 and requesting Document **#18-81**. Vendors registered with Demandstar may download most packages at no cost from the website. Download fees may apply to vendors not registered on the website. Packages are also available from the SJC Purchasing Department. When making a request provide the full company name, full company address, company phone number, primary contact and email address.

Any and all questions or requests for information relating to this Request for Proposal shall be **submitted in writing** by or before close of business (4:00PM) on August 9, 2018, to the Designated Point of Contact provided below:

**Designated Point of Contact:** Travis Hembree, Procurement Coordinator  
St. Johns County Purchasing  
500 San Sebastian View  
St. Augustine FL 32084  
Email: [thembree@sjcfl.us](mailto:thembree@sjcfl.us)  
Fax: (904) 209-0157

In the event the Designated Point of Contact provided above is absent or otherwise unavailable for more than three (3) business days, interested firms may contact Leigh Daniels, CPPB, Procurement Supervisor at [ldaniels@sjcfl.us](mailto:ldaniels@sjcfl.us).

**Interested firms shall not contact any staff member of St. Johns County, including members of the Board of County Commissioners, except the above referenced individual, with regard to this RFP as stated in SJC Purchasing Code 304.6.5 "Procedures Concerning Lobbying".** Any such communication may result in disqualification from consideration for award of a contract for these services.

RFP Packages **MUST** be submitted in a **SEALED** envelope/container and clearly marked on the exterior of the package: **RFP 18-81 SJC Tourism Market Research and Economic Impact Study**. Each package submitted must have the respondent's name and mailing address marked plainly on the outside of the envelope/container. Each submitted RFP Package shall consist of one (1) original hard-copy, which shall include all required documents and any supplemental information, and one (1) exact electronic copy submitted on a USB drive.

**Deliver or Ship RFP Packages to:** St. Johns County Purchasing Department  
500 San Sebastian View  
St. Augustine FL 32084

*Vendors shall not contact, lobby or otherwise communicate with any SJC employee, including any member of the Board of County Commissioners, other than the above referenced individual from the point of advertisement of the RFP until contract(s) are executed by all parties, per SJC Purchasing Code 304.6.5 "Procedures Concerning Lobbying". According*

*to SJC policy, any such communication shall disqualify the vendor or Contractor from responding to the subject invitation to bid, request for quote, request for proposal, invitation to negotiate or request for proposals and possible debarment for periods up to twelve (12) months.*

Any bidder, proposer or person substantially and adversely affected by an intended decision or by any term, condition, procedure or specification with respect to any bid, invitation, solicitation of proposals or Request for Proposals, shall file with the Purchasing Department for St. Johns County, a written notice of intent to protest no later than seventy two (72) hours (excluding Saturdays, Sundays, and legal holidays for employees of St. Johns County) after the posting either electronically or by other means of the notice of intended action, notice of intended award, bid tabulation, publication by posting electronically or by other means of a procedure, specification, term or condition which the person intends to protest, or the right to protest such matter shall be waived. The protest procedures may be obtained from the Purchasing Department and are included in St. Johns County's Purchasing Manual. All of the terms and conditions of the County's Purchasing Manual are incorporated by reference and are fully binding.

BOARD OF COUNTY COMMISSIONERS  
OF ST. JOHNS COUNTY, FLORIDA  
HUNTER S. CONRAD, CLERK

BY: \_\_\_\_\_  
Deputy Clerk

**PART II: INTRODUCTION**

**A. PURPOSE**

St. Johns County is issuing this Request for Proposal (RFP) from qualified and experienced vendors specializing in economic based research to develop a data collection program, facilitate the collection of that data over a one-year period and complete a data analysis and economic impact study at the end of the data collection period. The project will focus on the St. Johns County tourism industry and shall address trends and shifts in visitation which occur throughout the year, the economic impact of tourism on the various sectors of the economy as well as a whole and the overall composition or profile of the day-use and overnight visitors. For the purpose of this project, visitor shall mean individual who reside outside of the County limits and visit the county either overnight or for the day for recreation, holiday, business, medical, special events, etc.

**B. TENTATIVE SCHEDULE OF EVENTS**

The County proposes the following tentative schedule of events for this Request for Proposal (RFP), and subsequent contract award. This schedule is for planning purposes only, and is subject to change, without notice, based upon the County's needs.

Advertisement of Request for Proposals	July 26, 2018
Deadline for Questions / Requests for Information/Clarifications	August 09, 2018
Issuance of Final Addendum	August 16, 2018
Due Date for Submittal of RFP Packages	August 23, 2018
Evaluation Meeting for submitted RFP Packages	September 06, 2018
BOCC Meeting for Approval of Award to Recommended Firm	October 02, 2018
Award of Contract	October 05, 2018

**C. DESIGNATED POINT OF CONTACT FOR QUESTIONS/INFORMATION**

Any and all questions or requests for information relating to this Request for Proposal shall be submitted *in writing* by or before close of business (4:00PM) on August 9, 2018, to the Designated Point of Contact provided below:

**Designated Points of Contact:** Travis Hembree, Procurement Coordinator  
SJC Purchasing Department  
500 San Sebastian View  
St. Augustine FL 32084  
Email: [thembree@sjcfl.us](mailto:thembree@sjcfl.us)  
Fax: (904) 209-0157

In the event the Designated Point of Contact provided above is absent or otherwise unavailable for more than three (3) business days, firms may contact Leigh Daniels, CPPB, Procurement Supervisor at [ldaniels@sjcfl.us](mailto:ldaniels@sjcfl.us).

**Interested firms shall not contact any staff member of St. Johns County, including members of the Board of County Commissioners, except the above referenced individual, with regard to this RFP as stated in SJC Purchasing Code 304.6.5 "Procedures Concerning Lobbying".** Any such communication shall result in disqualification from consideration for award of a contract for these services.

**D. ADDENDA**

Any and all clarifications, answers to questions, or changes to this RFP shall be provided through a County issued Addendum, posted on [www.demandstar.com](http://www.demandstar.com). Any clarifications, answers, or changes provided in any manner other than a formally issued addendum, are to be considered "unofficial" and shall not bind the County to any requirements, terms or conditions not stated herein.

The County shall make every possible, good faith effort to issue any and all addenda no later than seven (7) days prior to the due date for proposals. Any addenda issued after this date, shall be for material, necessary clarifications to the Request for Proposal.

Any and all issued Addenda must be included with all copies of each Respondent's submitted RFP Package. Failure to submit an issued addendum with the submitted RFP Package may result in the Respondent being deemed non-responsive, and being removed from consideration for award.

**E. DUE DATE & LOCATION**

Packages submitted in response to this Request for Proposal must be delivered to, and received by the SJC Purchasing Department by or before four o'clock (4:00PM) on **Thursday, August 23, 2018**. Any packages received after this deadline will be deemed unresponsive, and shall be returned to the addressee unopened.

**RFP Packages shall be delivered to:** St. Johns County Purchasing Department  
500 San Sebastian View  
St. Augustine, FL 32084  
Attn: Travis Hembree, Procurement Coordinator

**F. SUBMITTAL OF QUESTIONS/INQUIRIES**

Any and all questions and/or inquiries related to this RFP, shall be directed, *in writing*, to the Designated Point of Contact as provided above, by or before four o'clock (4:00PM) EST on **Thursday, August 9, 2018**. Any questions received after this deadline will not be addressed or clarified by the County, unless it is determined to be in the best interest of the County to do so. The County reserves the right to extend the deadline for RFP submission in order to clarify or answer questions as necessary to serve the best interest of the County.

**Interested Vendors shall not contact, lobby, or otherwise communicate with any SJC employee, including any member of the Board of County Commissioners, other than the above referenced individual from the point of advertisement of the solicitation, until contract(s) are executed by all parties, per SJC Purchasing Code 304.6.5 "Procedures Concerning Lobbying". According to SJC Policy, any such communication shall disqualify the vendor, contractor, or consultant from responding to the subject invitation to negotiate or request for qualifications.**

**G. DETERMINATION OF RESPONSIVENESS**

The Procurement Coordinator shall make a determination for each respondent, as to the responsiveness of the submitted RFP Package to the requirements provided herein. Any respondent who is not responsive to the requirements of this Request for Proposals may be determined non-responsive, and may be removed from consideration by the Evaluation Committee. Only those respondents who are fully responsive to the requirements herein will be evaluated for consideration of award.

The County reserves the right to waive any minor formality or irregularity in any submitted RFP Proposal. However, any missing information or document(s) that are material to the purpose of the RFP shall not be waived as a minor formality.

**H. EVALUATION OF RESPONSES**

All responsive RFP Packages shall be evaluated by an Evaluation Committee of no less than three (3) representatives. Each Evaluation Committee Member will receive an electronic copy of all responsive RFP Packages submitted, a copy of the RFP Document with all issued Addenda, an Evaluator's Score Sheet, and an Evaluator's Narrative Sheet. Each Committee Member shall then evaluate each RFP Package according to the criteria provided herein. Each Committee Member shall evaluate the RFP Packages individually, with no communication, coordination, or influence from any other individual(s). Scores for each Respondent shall be recorded on the Evaluator's Score Sheet, and an explanation of the scores shall be provided on the Evaluator Narrative Sheet. A public Evaluation Meeting will be held by the SJC Purchasing Department to record the scores from each Evaluation Committee Member, and to rank the responding firms based on the Evaluation Committee scores.

The County desires to avoid the expense to all parties of unnecessary presentations; however, the County may elect to conduct oral interviews or presentations from one or more of the respondents in order to make a final determination of the top rankings. If the County elects to conduct oral interviews or presentations, a notice of the meeting will be posted, and firms selected to participate in interviews/presentations will be notified.

## **PART III: GENERAL REQUIREMENTS**

### **A. SCOPE OF WORK**

St. Johns County is seeking a direct contract with a professional organization specializing in economic based research to develop a data collection program, facilitate the collection of that data over a one-year period and complete a data analysis and economic impact study at the end of the data collection period. The project will focus on the St. Johns County tourism industry and shall address trends and shifts in visitation which occur throughout the year, the economic impact of tourism on the various sectors of the economy as well as a whole and the overall composition or profile of the day-use and overnight visitors. For the purpose of this project, visitor shall mean individual who reside outside of the County limits and visit the county either overnight or for the day for recreation, holiday, business, medical, special events, etc.

### **B. MINIMUM QUALIFICATIONS**

Respondents must be currently licensed to do business in the State of Florida, must have a minimum of three (3) years' experience in conducting tourism market research and economic impact studies, and show proof thereof in each copy of the submitted RFP Package.

Respondents must submit supporting documentation establishing number of years in business such as business licenses and (if applicable) a Sunbiz report with the company registered as "Active".

Copies of any and all licenses, permits, certifications and any and all other relevant documentation must be submitted with each respondent's RFP Package on **Attachment "3-A"**, Licenses, Permits, and Certifications, provided herein.

County Staff may consider any evidence available regarding technical, other qualifications and abilities of a Respondent, including past performance (experience) with the County prior to recommending approval of award to the St. Johns County Board of County Commissioners.

### **C. SCOPE OF SERVICES**

#### **Task 1 – Familiarization and development of survey and methodology**

- Preliminary meeting or phone conference with County staff to confirm goals and timeline of the project.
- Review existing available County specific data supplied by the County including Smith Travel Research, VisaVue, 2016 Brand Perception Study, Tax Collector data, etc.
- Interview Tourism Development Council board members, St. Johns County staff and community industry leaders as appropriate to determine tourism related areas of interest which the data collection efforts should address. At a minimum, the collected data must be sufficient for the Consultant to:
  1. Estimate a total overnight capacity for visitors in the County.
  2. Estimate total number of visitors to the County annually with a breakdown of day-use visitors vs. overnight visitors.
  3. Create a visitor profile for the overall visitor, the day-use visitor and the overnight visitor.
  4. Establish and assess annual and seasonal tourism trends.
  5. Assess the economic impact of tourism as a whole and by specific industry (e.g. accommodations and lodging, restaurants and dining, attractions, shopping and souvenirs, etc.)
- With input from County staff, develop a methodology that collects tourism industry specific data from across the County at a minimum of one week (Sunday through Saturday) a month for a 12-month period.

#### **Task 2 - Data collection**

- In accordance with the County approved methodology from Task 1, collect tourism industry specific data from across the County a minimum of one week (Sunday through Saturday) a month for a 12-month period.
- Interview County industry leaders as appropriate to determine observed tourism use patterns, trends and impacts in the St. Johns County market.

### **Task 3 – Evaluation and Reporting**

- Utilize data available to the County (e.g. Smith Travel Research, VisaVue, Brand Perception Study 2016, Tax Collector data, etc.) along with data collected in task 2 to draft a report which:
  1. Estimate a total overnight capacity for visitors in the County.
  2. Estimate total number of visitors to the County annually with a breakdown of day-use visitors and overnight visitors.
  3. Details visitor profiles for the overall St. Johns County Tourist as well as a breakdown of overnight visitor profiles vs. day-use visitor profiles.
  4. Identifies annual and seasonal trends and shifts in tourism.
  5. Assess the economic impact of tourism as a whole and by specific industry (e.g. accommodations and lodging, restaurants and dining, attractions, shopping and souvenirs, etc.)
- Provide a copy of the draft report to County staff for initial review and present the draft report to the Tourist development Council at a regularly scheduled meeting.
- Revise/clarify the draft report incorporating as appropriate input from County staff and the Tourist Development Council.
- Provide five hard copies and an electronic copy of the revised final report to the County.

#### **D. CONSULTANT EQUIPMENT**

The Consultant is required to provide any and all equipment necessary to perform the services stated herein, which are required by the Contract Agreement.

#### **E. SUB-CONSULTANTS**

Each Respondent shall submit, with his RFP Package, a list of proposed Sub-consultants and major materials suppliers to be used if awarded the contract. A copy of **Attachment “3-G”**, “List of Proposed Sub-consultants”, provided herein shall be used to submit this information with each RFP Package. Each Respondent shall also provide documentation to fully demonstrate the qualifications of any and all proposed sub-consultants and that they have sufficient and relevant experience and credentials to perform the services described herein. This information shall be provided in the form of resumes of all sub-consultants including any and all licenses/permits/certifications held, education and experience related information for each sub-consultant. If no sub-consultants or major material suppliers are required, so state there on. Any work proposed by the Consultant, that shall be performed by any sub-consultant shall be previously approved by the County, prior to any work being performed.

The County reserves the right to disqualify any Consultant, Sub-consultant, Vendor, or material supplier due to previously documented project problems, either with performance or quality.

Sub-consultants and other persons and organizations proposed by a respondent and accepted by the County, must be used on the work for which they were proposed and accepted and shall not be changed except with the written approval of the County, prior to a change being made.

#### **F. FORCE MAJEURE**

If awarded on the basis of this proposal, the undersigned pledges to provide the equipment/services as specified in the Proposal and County Specifications barring any delays due to strikes, fires, transportation difficulties or other causes beyond the control of the undersigned.

## **PART IV: CONTRACT REQUIREMENTS**

### **A. CONTRACT AGREEMENT & TERM**

The intent of County Staff is to identify the number one ranked firm through the evaluation process and to recommend to the Board of County Commissioners, to enter into negotiations, and if successful, award a contract with that firm. If negotiations with the number one ranked firm are not successful, the County will end those negotiations, and enter into negotiations with the second ranked firm, until such time as a contract is awarded, or all firms have been exhausted, and the County must reject all proposals.

The Contract Agreement for the services provided herein shall be on a form furnished by St. Johns County. The initial contract term shall be effective for a period of one (1) year. The County reserves the right to extend the contract beyond the initial term if it serves the best interest of the County.

In the event that a Contract Agreement is attached to the RFP, such attached Contract Agreement is for discussion purposes only, and not necessarily reflective of any Contract that may be ultimately entered into by the County. In the event that a Contract Agreement is not attached to the RFP, it is expressly understood that the Board of County Commissioner's (Board's) preference/selection of any proposal does not constitute an award of a Contract Agreement with the County. It is anticipated that subsequent to the Board's preference/selection of any Proposal, Contract Negotiations will follow between the County and the selected Respondent. It is further expressly understood that no contractual relationship exists with the County until a Contract has been executed by both the County, and the selected Respondent. The County reserves the right to delete, add to, or modify one or more components of the selected Respondent's Proposal, in order to accommodate changed or evolving circumstances that the County may have encountered, since the issuance of the RFP.

The executed agreement between St. Johns County and the awarded Consultant shall be nonexclusive. As such, the County reserves the right to separately identify and bid as an individual project(s) or make separate purchase(s) of any services, parts, materials, supplies and/or equipment pertaining to its provision of SJC tourism market research and economic impact study as necessary to serve the best interests of the County.

### **B. CONTRACT AWARD**

Recommendation shall be made to the Board of County Commissioners by County Staff to enter into negotiations with the highest ranked firm with the intention of coming to agreement over terms, conditions, and pricing in order to award a Contract for the services described herein.

### **C. CONTRACT PERFORMANCE**

At any point in time during the term of the Contract with the awarded Consultant, County Staff may review records of performance to ensure that the Consultant is continuing to provide sufficient financial support, equipment and organization as prescribed herein. The County may place said contract on probationary status and implement termination procedures if the County determines that a Consultant no longer possesses the financial support, equipment and organization which would have been necessary during the RFP evaluation period in order to comply with this demonstration of competency section.

### **D. LICENSES, PERMITS & CERTIFICATIONS**

The Consultant shall be responsible for acquiring and maintaining any and all necessary licenses, permits, and/or certifications required to perform the work described herein throughout the duration of the Contract. The Consultant shall be solely responsible for paying any and all fines, penalties or fees assessed to the County, or the Consultant, for any lapse in require licenses, permits, or certifications required for any portion of the work.

### **E. INSURANCE REQUIREMENTS**

The Consultant shall not commence work under this Contract until he/she has obtained all insurance required under this section and such insurance has been approved by the County. All insurance policies shall be issued by companies authorized to do business under the laws of the State of Florida. The Consultant shall furnish proof of Insurance to the County prior to the commencement of operations. The Certificate(s) shall clearly indicate the Consultant has obtained insurance of the type, amount, and classification as required by contract and that no material change or cancellation of the insurance shall be effective without thirty (30) days prior written notice to the County. Certificates shall specifically

include the County as Additional Insured for all lines of coverage except Workers' Compensation and Professional Liability. A copy of the endorsement must accompany the certificate. Compliance with the foregoing requirements shall not relieve the Consultant of its liability and obligations under this Contract.

Certificate Holder Address: St. Johns County, a political subdivision of the State of Florida  
500 San Sebastian View  
St. Augustine, FL 32084

The Consultant shall maintain during the life of this Contract, Comprehensive General Liability Insurance with minimum limits of \$1,000,000 per occurrence, \$2,000,000 aggregate, to protect the Consultant from claims for damages for bodily injury, including wrongful death, as well as from claims of property damages which may arise from any operations under this contract, whether such operations be by the Consultant or by anyone directly employed by or contracting with the Consultant.

The Consultant shall maintain during the life of the contract, Professional Liability or Errors and Omissions Insurance with minimum limits of \$1,000,000, if applicable.

The Consultant shall maintain during the life of this Contract, Comprehensive Automobile Liability Insurance with minimum limits of \$300,000 combined single limit for bodily injury and property damage liability to protect the Consultant from claims for damages for bodily injury, including the ownership, use, or maintenance of owned and non-owned automobiles, including rented/hired automobiles whether such operations be by the Consultant or by anyone directly or indirectly employed by a Consultant.

The Consultant shall maintain during the life of this Contract, adequate Workers' Compensation Insurance in at least such amounts as are required by the law for all of its employees per Florida Statute 440.02.

In the event of unusual circumstances, the County Administrator or his designee may adjust these insurance requirements.

#### **F. GOVERNING LAWS & REGULATIONS**

It shall be the responsibility of the Consultant to be familiar and comply with any and all federal, state, and local laws, ordinances, rules and regulations relevant to the services to be performed under this Contract. The Contract Agreement shall be governed by the laws of the State of Florida and the County both as to interpretation and performance.

#### **G. TERMINATION**

Failure on the part of the Consultant to comply with any portion of the duties and obligations under the Contract Agreement shall be cause for termination. If the Consultant fails to perform any aspect of the responsibilities described herein, St. Johns County shall provide written notification stating any and all items of non-compliance. The Consultant shall then have seven (7) consecutive calendar days to correct any and all items of non-compliance. If the items of non-compliance are not corrected, or acceptable corrective action, as approved by the County, has not been taken within the seven (7) consecutive calendar days, the Contract Agreement may be terminated by St. Johns County for cause, upon giving seven (7) consecutive calendar days written notice to the Consultant.

In addition to the above, the County may terminate the Contract Agreement at any time, without cause, upon thirty (30) days written notice to the Consultant.

#### **H. INDEMNIFICATION**

To the fullest extent permitted by law, the Consultant shall indemnify and hold harmless St. Johns County, Florida, and employees from and against liability, claims, damages, losses and expenses, including attorney's fees, arising out of or resulting from performance of the Work, provided that such liability, claims, damage, loss or expense is attributable to bodily injury, sickness, disease or death, or injury to or destruction to tangible property (other than the Work itself) including loss of use resulting there from, but only to the extent caused in whole or in part by negligent acts or omissions of the Consultant, a Sub-consultant, or anyone directly or indirectly employed by them or anyone for whose acts they may be liable, regardless of whether or not such liability, claim, damage, loss or expense is caused in part by a party indemnified hereunder.

In claims against any person or entity indemnified under this Paragraph by an employee of the Consultant, a Sub-Consultant, any one directly or indirectly employed by them or anyone for whose acts they may be liable, the indemnification obligation under this Paragraph shall not be limited by a limitation on amount or type of damages, compensation or benefits payable by or for the Consultant or a Sub-Consultant under workers' compensation acts, disability benefits acts or other employee benefit acts.

**I. PUBLIC RECORDS**

In accordance with Chapter 119 of the Florida Statutes (Public Records Law) and except as may be provided by other applicable State and Federal Law, all proposers should be aware that Request for Proposals and the responses thereto are in the public domain. However, the proposers are requested to identify specifically any information contained in their proposals which they consider confidential and/or proprietary and which they believe to be exempt from disclosure, citing specifically the applicable exempting law.

**PART V: REQUEST FOR PROPOSALS SUBMITTAL REQUIREMENTS**

**A. RESPONDENT RESPONSIBILITIES**

Respondents are responsible for any and all costs associated with developing and submitting an RFP Package in response to this Request for Proposals. Respondents are also solely responsible for any and all costs associated with interviews and/or presentations requested by the County. It is expressly understood, no Respondent may seek or claim any award and/or re-imbursment from the County for any expenses, costs, and/or fees (including attorneys' fees) borne by any Respondent, during the entire RFP process. Such expenses, costs, and/or fees (including attorneys' fees) are the sole responsibility of the Respondent.

All RFP Packages received in response to this Request for Proposals shall become the property of St. Johns County and will not be returned. In the event of contract award, all documentation produced as part of the contract will become the exclusive property of St. Johns County.

By submitting an RFP Package, each Respondent certifies that the proposer has fully read and understands any and all instructions in the Request for Proposals, and has full knowledge of the scope, nature, and quality of work to be performed. All RFP Packages submitted shall be binding for one hundred twenty (120) consecutive calendar days following the submittal due date.

**B. EVALUATION OF RESPONSES**

All properly submitted RFP Packages shall be evaluated by an Evaluation Committee. Each Evaluation Committee Team Member will receive a set of all of the RFP packages submitted, a copy of the RFP document with all issued Addenda, and an Evaluator's Score Sheet. The Team shall then evaluate each RFP Package according to the criteria described herein. Each Evaluation Team Member shall evaluate the RFP Packages individually, with no communication, coordination, or influence from any other Evaluation Team Member, or any other individual. Scores for each Respondent shall be recorded on the Evaluator's Score Sheet. A public Evaluation Meeting will be held by the SJC Purchasing Department to record the scores from each Evaluation Committee Member, and rank the firms' scores highest to lowest.

County Staff may consider any evidence available regarding technical, other qualifications and abilities of a respondent, including past performance (experience) with the County prior to recommending approval of award to the St. Johns County Board of County Commissioners.

The St. Johns County Board of County Commissioners reserves the right to reject any or all proposals, waive minor formalities or award to/negotiate with the firm whose proposal best serves the interest of the County.

**C. CONFLICT OF INTEREST**

Respondents must certify that they presently have no interest and shall acquire no interest, either directly or indirectly, which would conflict in any manner with the performance of required services as provided herein. Respondents must certify that no person having any interest shall be employed for the performance of any of the required services as provided herein.

Respondents are required to disclose to the County any and all potential conflicts of interest for any prospective business association, interest or circumstance, the nature of work the Respondent may undertake and request an opinion from the County, whether such association, interest, or circumstance constitutes a conflict of interest.

**D. TRADE SECRETS**

To invoke the provision of Florida Statute 624.4213, Trade Secrets, or other applicable law, the requesting firm must mark each page of such document or specific portion of a document claimed to be a trade secret must be clearly marked as “trade secret.” All material marked as a trade secret must be separated from all non-trade secret material, such as being submitted in a separate envelope clearly marked as “trade secret.” If the office or department receives a public records request for a document or information that is marked and certified as a trade secret, the office or department shall promptly notify the person that certified the document as a trade secret.

To invoke the provisions of Florida Statute 812.081, Trade Secrets, or other applicable law, the requesting firm must complete an Affidavit for Trade Secret Confidentiality, signed by an officer of the company, and submit the affidavit with the information classified as “Trade Secret” with other proposal documents. The affidavit must reference the applicable law or laws under which trade secret status is to be granted.

**E. USE OF COUNTY LOGO**

Pursuant to, and consistent with, County Ordinance 92-2 and County Administrative Policy 101.3, the Consultant may not manufacture, use, display, or otherwise use any facsimile or reproduction of the County Seal/Logo without express written approval of the Board of County Commissioners of St. Johns County, Florida.

Respondents shall not include the St. Johns County Seal/Logo in any part of their submitted RFP Package. In the event a package is submitted to the County with the County’s Seal/Logo included, the County reserves the right to find the submitting firm non-responsible to the requirements provided herein, which may result in the respondent being removed from consideration for award of a contract under this RFP.

**F. EVALUATION CRITERIA**

It is the intention of St. Johns County to evaluate, and rank the respondents that submit RFP Packages from highest to lowest utilizing the evaluation criteria listed below.

Evaluation of the responses to this RFP will comply with the specific criteria as follows:

<u>Evaluation Criteria:</u>	<u>Maximum Possible Points Per Evaluator:</u>
A. Price Proposal	20
B. Company & Staff Qualifications and Resources	25
C. Related Experience	25
D. Approach to Services/Methodology	25
E. Quality of Submittal	5

**Total Maximum Points Possible: 100**

**G. RFP PACKAGE SUBMITTAL FORMAT**

All RFP Packages must follow the same format, and shall be evaluated partially based on the Respondent’s ability to follow the instructions herein. To receive points from evaluation, the RFP Package format must sufficiently address and demonstrate all required components, and follow the order of sections described below. The aim of the required format is to simplify the preparation and evaluation of the RFP Packages. All RFP Packages must include the following components:

<u>Section</u>	<u>Topic</u>
1	Cover Page
2	Cover Letter
3	Company & Staff Qualifications and Resources <ul style="list-style-type: none"> <li>a. Attachment “3-A” – Licenses, Permits and Certifications</li> <li>b. Attachment “3-B” – Certificate(s) of Insurance</li> </ul>

- c. Attachment "3-C" – Claims, Liens, Litigation History
- d. Attachment "3-D" – Company Organization Chart
- e. Attachment "3-E" – Project Team Organization Chart
- f. Attachment "3-F" – Key Personnel List
- g. Attachment "3-G" – Proposed Sub-Consultants
- 4 Related Experience
  - a. Attachment "4-A" – Previous Experience Narrative
  - b. Attachment "4-B" - References
- 5 Project Approach to Services/Methodology
  - a. Attachment "5-A" – Project approach/methodology narrative
  - b. Attachment "5-B" – Proposed Schedule/Timeline for Deliverables
- 6 Workload & Availability
  - a. Attachment "6-A" – Project Status Report
- 7 Pricing Proposal
  - a. Attachment "7-A" – Pricing Proposal
- 8 Other Required Forms
  - a. Attachment A – St. Johns County Affidavit
  - b. Attachment B – Affidavit of Solvency
  - c. Attachment C – Drug-Free Workplace
  - d. Attachment D – Conflict of Interest Disclosure
  - e. Any Issued Addenda

**H. RFP PACKAGE COMPONENTS**

All of the components outlined below must be included with each copy of the RFP Package and submitted as follows: one (1) hard copy original on 8 1/2" X 11" pages, numbered, 1 inch margins, typewritten with Times New Roman style and 12 size font, and one (1) exact electronic copy on USB drive. Additionally, all headings, sections and sub-sections shall be identified appropriately. The electronic version on USB Drive must be an identical copy of the original hard copy in pdf format.

In order to insure a uniform review process and to obtain the maximum degree of comparability, it is recommended that proposals be organized in the manner specified as follows:

**Section 1: Cover Page** – Each Respondent shall use the cover page provided in Part VII: Attachments/Forms

**Section 2: Cover Letter** – Each Respondent shall provide a one or two page letter of introduction. Include the original signed letter of introduction with the original RFP Package, and a copy of the letter of introduction with each copy of the RFP Package. The letter of introduction should include the following:

- Full legal company name,
- Physical street address and mailing address if different than street address (include location address of office that will perform the services under this Contract),
- Primary company phone and fax numbers and email address,
- Company type, i.e. Corporation, Partnership, etc.,
- Names and titles of principals,
- Brief statement of company history (date of establishment, number of years in business, number of employees, etc.),
- Brief description of business philosophy, and
- Reason for interest in submitting a response to this solicitation.

**Section 3: Company & Staff Qualifications and Resources**

In this section, each Respondent shall provide evidence that the firm has qualified and experienced staff to perform the

scope of services required for this project. In addition, provide a brief summary of the firm's overall capabilities relative to a tourism market research and economic impact study as outlined in the scope of services relative to this project.

**3-A. Licenses/Permits/Certifications**

In this section of the package, each Respondent shall provide a list and copies of all current licenses and certifications. Minimum documentation shall be shown by completing and submitting **Attachment "3-A"** – Licenses/Permits/Certifications.

**3-B. Certificate of Insurance**

In this section, each Respondent shall provide copies of Certificate(s) of Insurance providing evidence of all coverages as specified in Section IV above and submitted as **Attachment "3-B"** – Certificates of Insurance. (Prior to issuance of an executed contract, awarded respondent shall provide a Certificate of Insurance naming St. Johns County as "Additional Insured".)

**3-C. Claims, Liens, Litigation History**

In this section of the package, each Respondent shall provide a list of all claims, liens and/or litigation history for the past seven (7) years by completing and submitting **Attachment "3-C"** – Claims, Liens, and Litigation History.

**3-D. Company Organization**

In this section each Respondent shall submit a Company Organization Chart reflecting the organization of the company by submitting **Attachment "3-D"** – Company Organization Chart.

**3-E. Project Team Organization**

In this section each Respondent shall submit names, titles and organization of the proposed project team by submitting **Attachment "3-E"** – Project Team Organization Chart.

**3-F. Key Personnel**

In this section of each Respondent shall submit evidence of qualified personnel shown on the Project Organization Chart who are proposed to perform the scope of work by completing all information and submitting **Attachment "3-F"** – Key Personnel List. The personnel list shall include any one who will be performing the responsibilities of a project manager, marketing and trends researcher, project administration and any other key position for this project. Brief comprehensive resumes should be provided for each staff member listed.

**3-G. Proposed Sub-Consultants**

In this section, each Respondent shall submit evidence of qualified sub-consultants proposed to perform any portion of work specified herein by completing all information and submitting **Attachment "3-G"** – List of Proposed Sub-Consultants. Brief comprehensive resumes, including any and all licenses/permits/certifications held, should be provided for each sub-consultant listed. All proposed sub-consultants are subject to approval by the County.

**Section 4: Related Experience**

In this section of the package, each Respondent shall provide evidence that the firm has successfully provided tourism market research and economic impact studies. Proof shall be provided by completing and submitting the following information and attachments:

**4-A. Previous Experience**

In this section firms shall provide a written narrative describing a minimum three (3) projects as the lead firm in the last five (5) years where the firm conducted tourism market research and economic impact studies by submitting **Attachment "4-A"** – Previous Experience. The written narrative must include, at a minimum: (1) Company or client category; (2) Background information or situation analysis; (3) Approach; (4) Deliverables; and (5) Identify the key participants involved and the role each of them played.

**4-B. References**

In this section each Respondent shall provide a list of five (5) references from individuals, firms or agencies that have contracted with the respondent to perform services of similar size and scope as those described herein. The

information required shall include: reference company name, date(s) of service, project information, and a contact person name, title, phone number and email address. Each Respondent must include **Attachment "4-B" – References** in this section. References should include the primary contacts for the projects listed in the narrative for Section "4-A"

References shall be checked by the Purchasing Department, for the number one ranked firm, to verify capability to perform the work, and responsibility to fulfill the requirements of the contract.

**Section 5: Approach to Services/Methodology**

In this section of the package, each Respondent shall provide his/her approach and methodology and a proposed schedule/timeline for performing the services listed in the RFP scope of services by completing and submitting the following:

**5-A. Project Approach/Methodology**

In this section of the package, each Respondent shall provide a written narrative describing the proposed approach to services and methodology for performing the services required for a tourism market research and economic impact study by submitting **Attachment "5-A" – Project Approach/Methodology**. The narrative must include a detailed work plan that addresses approach and method of how work on the project will be performed. The objective of the work plan is to demonstrate the Respondent’s ability to logically plan and complete the project, and the Respondent’s ability to successfully deliver any periodic progress reports, final reports, and presentations to the County.

**5-B. Proposed Schedule/Timeline**

Each Respondent shall provide a schedule/timeline for implementation of the deliverables identified for each task listed in the RFP scope of services by submitting **Attachment "5-B" – Proposed Schedule/Timeline for Implementation of Deliverables**.

**Section 6: Workload & Availability**

In this section, each Respondent shall demonstrate the current workload being carried by the submitting firm, including but not limited to: ongoing projects, upcoming projects, estimated completion dates for both by completing and submitting **Attachment "6-A" – Project Status Report**.

**Section 7: Pricing**

In this section, each Respondent shall submit a pricing proposal which shall consist of a total proposed amount for the project and an itemized pricing schedule for task deliverables including the proposed unit prices per hour for services performed and a total number of hours proposed for providing each deliverable. Each Respondent must include **Attachment "7-A" – Pricing Proposal** in this section.

Price is included as one of the evaluation criteria; the lowest priced proposal will receive the maximum weighted score for the price criteria. The other proposals will receive a percentage of the weighted score based on the percentage differential between the lowest proposal and the other proposals in accordance with the following example:

Vendor	Proposed Price	Percentage	By	Weight	Equals	Weighted Score***
A	\$20,000	100	X	20	=	20
B	\$25,000	80*	X	20	=	16
C	\$28,000	71**	X	20	=	14

\* Vendor B’s percentage is  $\$20,000 \div \$25,000 = 80\%$

\*\* Vendor C’s percentage is  $\$20,000 \div \$28,000 = 71\%$

\*\*\* Weighted Score shall be rounded to nearest whole number

The price evaluation and calculation may be revised to conform to the needs for each individual RFP selection. *This*

*will be graded on a 0 – 20 scale.*

**Section 8: Other Required Forms** – Each Respondent shall submit in this section of the RFP Package the following forms:

- **Attachment “A”** – Affidavit,
- **Attachment “B”** – Affidavit of Solvency
- **Attachment “C”** – Drug-Free Workplace Form,
- **Attachment “D”** – Conflict of Interest Disclosure, and
- **Signed copies of any issued addenda**



**PART VII: ATTACHMENTS/FORMS**

**REQUEST FOR PROPOSALS (RFP) NO: 18-81  
SJC TOURISM MARKET RESEARCH AND ECONOMIC IMPACT STUDY**

**COVER PAGE**

**SUBMIT ONE (1) HARD-COPY ORIGINAL  
AND ONE (1) EXACT ELECTRONIC COPY ON USB DRIVE TO:**

**PURCHASING DEPARTMENT  
ST. JOHNS COUNTY  
500 SAN SEBASTIAN VIEW  
ST. AUGUSTINE FLORIDA 32084  
ATTN: Travis Hembree, Procurement Coordinator**

**FULL LEGAL NAME OF COMPANY:** \_\_\_\_\_

**MAILING ADDRESS:** \_\_\_\_\_

**CONTACT EMAIL ADDRESS:** \_\_\_\_\_

**DATE:** \_\_\_\_\_

**REQUEST FOR PROPOSALS (RFP) NO: 18-81  
SJC TOURISM MARKET RESEARCH AND ECONOMIC IMPACT STUDY**

**ATTACHMENT "A"**

**AFFIDAVIT**

TO: ST. JOHNS COUNTY BOARD OF COUNTY COMMISSIONERS  
ST. AUGUSTINE, FLORIDA

At the time the proposal is submitted, the Respondent shall attach to his proposal a sworn statement.

The sworn statement shall be an affidavit in the following form, executed by an officer of the firm, association or corporation submitting the proposal and shall be sworn to before a person who is authorized by law to administer oaths.

STATE OF \_\_\_\_\_ COUNTY OF \_\_\_\_\_. Before me, the undersigned authority, personally appeared \_\_\_\_\_ who, being duly sworn, deposes and says he is (Title) of \_\_\_\_\_ (Firm) the respondent submitting the attached proposal for the services covered by the RFP documents for RFP No: 18-81, SJC Tourism Market Research and Economic Impact Study.

The affiant further states that no more than one proposal for the above referenced project will be submitted from the individual, his firm or corporation under the same or different name and that such respondent has no financial interest in the firm of another respondent for the same work, that neither he, his firm, association nor corporation has either directly or indirectly entered into any agreement, participated in any collusion, or otherwise taken any action in restraint of free competitive bidding in connection with this firm's proposal on the above described project. Furthermore, neither the firm nor any of its officers are debarred from participating in public contract lettings in any other state.

\_\_\_\_\_  
(Proposer)

By \_\_\_\_\_

\_\_\_\_\_  
(Title)

STATE OF \_\_\_\_\_ )  
COUNTY OF \_\_\_\_\_ )

Subscribed and sworn to before me this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_, by \_\_\_\_\_ who personally appeared before me at the time of notarization, and who is personally known to me or who has produced \_\_\_\_\_ as identification.

\_\_\_\_\_  
Notary Public

My commission expires:  
\_\_\_\_\_

**VENDOR ON ALL COUNTY PROJECTS MUST EXECUTE AND ATTACH THIS AFFIDAVIT TO EACH PROPOSAL.**

**REQUEST FOR PROPOSALS (RFP) NO: 18-81  
SJC TOURISM MARKET RESEARCH AND ECONOMIC IMPACT STUDY**

**ATTACHMENT "B"  
AFFIDAVIT OF SOLVENCY**

PERTAINING TO THE SOLVENCY OF {insert entity name}, being of lawful age and being duly sworn I, {insert affiant name}, as {insert position or title} (ex: CEO, officer, president, duly authorized representative, etc.) hereby certify under penalty of perjury that:

1. I have reviewed and am familiar with the financial status of above stated entity.
2. The above stated entity possesses adequate capital in relation to its business operations or any contemplated or undertaken transaction to timely pay its debts and liabilities (including, but not limited to, unliquidated liabilities, unmatured liabilities and contingent liabilities) as they become absolute and due.
3. The above stated entity has not, nor intends to, incur any debts and/or liabilities beyond its ability to timely pay such debts and/or liabilities as they become due.
4. I fully understand failure to make truthful disclosure of any fact or item of information contained herein may result in denial of the application, revocation of the Certificate of Public Necessity if granted and/or other action authorized by law.

The undersigned has executed this Affidavit of Solvency, in his/her capacity as a duly authorized representative of the above stated entity, and not individually, as of this \_\_\_ day of \_\_\_\_\_, 20\_\_.

\_\_\_\_\_  
Signature of Affiant

STATE OF \_\_\_\_\_)

COUNTY OF \_\_\_\_\_)

Subscribed and sworn to before me this \_\_\_ day of \_\_\_\_\_, 20\_\_, by \_\_\_\_\_ who personally appeared before me at the time of notarization, and who is personally known to me or who has produced \_\_\_\_\_ as identification.

\_\_\_\_\_  
Notary Public

My commission expires:  
\_\_\_\_\_

**REQUEST FOR PROPOSALS (RFP) NO: 18-81  
SJC TOURISM MARKET RESEARCH AND ECONOMIC IMPACT STUDY**

**St. Johns County Board of County Commissioners**

**ATTACHMENT "C"**

**DRUG-FREE WORKPLACE FORM**

The undersigned firm, in accordance with Florida Statute 287.087 hereby certifies that

\_\_\_\_\_ does:

Name of Firm

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
2. Inform employees about the danger of drug abuse in the workplace, the business' policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, employee assistance programs and the penalties that may be imposed upon employees for drug abuse violations.
3. Give each employee engaged in providing the contractual services that are described in St. Johns County's request for proposals to provide bond underwriter services a copy of the statement specified in paragraph 1.
4. In the statement specified in paragraph 1, notify the employees that, as a condition of working on the contractual services described in paragraph 3, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty or nolo contendere to, any violation of Florida Statute 893, as amended, or of any controlled substance law of the United States or any state, for a violation occurring in the workplace no later than five (5) days after such conviction or plea.
5. Impose a sanction on, or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community by, any employee who is so convicted.
6. Consistent with applicable provisions with State or Federal law, rule, or regulation, make a good faith effort to continue to maintain a drug-free workplace through implementation of paragraphs 1 through 5.

As the person authorized to sign this statement, I certify that this firm complies fully with the above requirements.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

**REQUEST FOR PROPOSALS (RFP) NO: 18-81  
SJC TOURISM MARKET RESEARCH AND ECONOMIC IMPACT STUDY**

**ATTACHMENT "D"**

**St. Johns County Board of County Commissioners**

**CONFLICT OF INTEREST DISCLOSURE FORM**

Project (RFP) Number/Description: RFP No 18-81, SJC Tourism Market Research and Economic Impact Study

The term "conflict of interest" refers to situations in which financial or other considerations may adversely affect, or have the appearance of adversely affecting a consultant's/contractor's professional judgment in completing work for the benefit of St. Johns County ("County"). The bias such conflicts could conceivably impart may inappropriately affect the goals, processes, methods of analysis or outcomes desired by the County.

Consultants/Contractors are expected to safeguard their ability to make objective, fair, and impartial decisions when performing work for the benefit of the County. Consultants/Contractors, therefore must there avoid situations in which financial or other considerations may adversely affect, or have the appearance of adversely affecting the Consultant's/Contractor's professional judgement when completing work for the benefit of the County.

The mere appearance of a conflict may be as serious and potentially damaging as an actual distortion of goals, processes, methods of analysis or outcomes. Reports of conflicts based upon appearances can undermine public trust in ways that may not be adequately restored even when the mitigating facts of a situation are brought to light. Apparent conflicts, therefore, should be disclosed and evaluated with the same vigor as actual conflicts.

It is expressly understood that failure to disclose conflicts of interest as described herein may result in immediate disqualification from evaluation or immediate termination from work for the County.

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Please check the appropriate statement:

I hereby attest that the undersigned Respondent has no actual or potential conflict of interest due to any other clients, contracts, or property interests for completing work on the above referenced project.

The undersigned Respondent, by attachment to this form, submits information which may be a potential conflict of interest due to other clients, contracts or property interests for completing work on the above referenced project.

Legal Name of Respondent: \_\_\_\_\_

Authorized Representative(s): \_\_\_\_\_  
Signature Print Name/Title

\_\_\_\_\_  
Signature Print Name/Title



**REQUEST FOR PROPOSALS (RFP) NO: 18-81  
SJC TOURISM MARKET RESEARCH AND ECONOMIC IMPACT STUDY**

**Full Legal Company Name:** \_\_\_\_\_

**ATTACHMENT "3-B"**  
**CERTIFICATES OF INSURANCE**  
(Attach or insert copy here)

**REQUEST FOR PROPOSALS (RFP) NO: 18-81  
SJC TOURISM MARKET RESEARCH AND ECONOMIC IMPACT STUDY**

**Full Legal Company Name:** \_\_\_\_\_

**ATTACHMENT "3-C"  
CLAIMS, LIENS, LITIGATION HISTORY  
(Complete and Submit)**

1. Within the past 7 years, has your organization filed suit or a formal claim against a project owner (as a prime or Sub-Consultant) or been sued by or had a formal claim filed by an owner, Sub-Consultant or supplier resulting from a construction dispute? Yes \_\_\_\_\_ No \_\_\_\_\_ If yes, please attach additional sheet(s) to include:

Description of every action Captions of the Litigation or Arbitration

Amount at issue: \_\_\_\_\_ Name (s) of the attorneys representing all parties:

Amount actually recovered, if any: \_\_\_\_\_

Name(s) of the project owner(s)/manager(s) to include address and phone number:

2. List all pending litigation and or arbitration.
3. List and explain all litigation and arbitration within the past seven (7) years - pending, resolved, dismissed, etc.
4. Within the past 7 years, please list all Liens, including Federal, State and Local, which have been filed against your Company. List in detail the type of Lien, date, amount and current status of each Lien.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

5. Have you ever abandoned a job, been terminated or had a performance/surety bond called to complete a job?

Yes \_\_\_\_\_ No \_\_\_\_\_ If yes, please explain in detail:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

6. For all claims filed against your company within the past five-(5) years, have all been resolved satisfactorily with final judgment in favor of your company within 90 days of the date the judgment became final? Yes \_\_\_\_\_ No \_\_\_\_\_ If no, please explain why? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

7. List the status of all pending claims currently filed against your company:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Liquidated Damages**

1. Has a project owner ever withheld retainage, issued liquidated damages or made a claim against any Performance and Payment Bonds? Yes \_\_\_\_\_ No \_\_\_\_\_ If yes, please explain in detail:

\_\_\_\_\_  
\_\_\_\_\_

**(Use additional or supplemental pages as needed)**

**REQUEST FOR PROPOSALS (RFP) NO: 18-81  
SJC TOURISM MARKET RESEARCH AND ECONOMIC IMPACT STUDY**

**Full Legal Company Name:** \_\_\_\_\_

**ATTACHMENT "3-D"**  
**COMPANY ORGANIZATION CHART**  
(Attach or insert copy here)

**REQUEST FOR PROPOSALS (RFP) NO: 18-81  
SJC TOURISM MARKET RESEARCH AND ECONOMIC IMPACT STUDY**

**Full Legal Company Name:** \_\_\_\_\_

**ATTACHMENT "3-E"**  
**PROJECT TEAM ORGANIZATION CHART**  
(Attach or insert copy here)



**REQUEST FOR PROPOSALS (RFP) NO: 18-81  
SJC TOURISM MARKET RESEARCH AND ECONOMIC IMPACT STUDY**

**ATTACHMENT "3-G"**

**LIST OF PROPOSED SUB-CONSULTANTS**

Each Respondent shall provide any and all Sub-Consultants or major materials suppliers proposed to perform any portion of work specified herein. Attach brief but comprehensive resumes for each sub-consultant listed below. All proposed Sub-Consultants are subject to approval by the County.

**DIVISION OF WORK**

**NAME AND ADDRESS OF SUB-CONSULTANTS**

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**REQUEST FOR PROPOSALS (RFP) NO: 18-81  
SJC TOURISM MARKET RESEARCH AND ECONOMIC IMPACT STUDY**

**ATTACHMENT "4-A"**

**PREVIOUS EXPERIENCE**

(Attach or insert copy here of a written narrative for at least three (3) market research and economic impact study projects completed within the past five (5) years)

**REQUEST FOR PROPOSALS (RFP) NO: 18-81  
SJC TOURISM MARKET RESEARCH AND ECONOMIC IMPACT STUDY**

**ATTACHMENT "4-B"**

**REFERENCES**

Each Respondent must submit a list of five (5) references from individuals, firms or agencies that have contracted with the respondent to perform services of similar size and scope as those described in this RFP. The information required shall include: reference company name, date(s) of service, project information, and a contact person name, title, phone number and email address. References shall be checked by the Purchasing Department, for the number one ranked firm, to verify capability to perform the work, and responsibility to fulfill the requirements of the contract.

1. Reference Company Name: \_\_\_\_\_  
Date(s) of Service: \_\_\_\_\_  
Project Information (Type of Study): \_\_\_\_\_  
\_\_\_\_\_  
Primary Reference Contact Name and Title: \_\_\_\_\_  
Contact Phone Number: \_\_\_\_\_  
Contact Email Address: \_\_\_\_\_

\*\*\*\*\*

2. Reference Company Name: \_\_\_\_\_  
Date(s) of Service: \_\_\_\_\_  
Project Information (Type of System): \_\_\_\_\_  
\_\_\_\_\_  
Primary Reference Contact Name and Title: \_\_\_\_\_  
Contact Phone Number: \_\_\_\_\_  
Contact Email Address: \_\_\_\_\_

\*\*\*\*\*

3. Reference Company Name: \_\_\_\_\_  
Date(s) of Service: \_\_\_\_\_  
Project Information (Type of System): \_\_\_\_\_  
\_\_\_\_\_  
Primary Reference Contact Name and Title: \_\_\_\_\_  
Contact Phone Number: \_\_\_\_\_  
Contact Email Address: \_\_\_\_\_

\*\*\*\*\*

4. Reference Company Name: \_\_\_\_\_  
Date(s) of Service: \_\_\_\_\_  
Project Information (Type of System): \_\_\_\_\_  
\_\_\_\_\_  
Primary Reference Contact Name and Title: \_\_\_\_\_  
Contact Phone Number: \_\_\_\_\_  
Contact Email Address: \_\_\_\_\_

\*\*\*\*\*

5. Reference Company Name: \_\_\_\_\_  
Date(s) of Service: \_\_\_\_\_  
Project Information (Type of System): \_\_\_\_\_  
\_\_\_\_\_  
Primary Reference Contact Name and Title: \_\_\_\_\_  
Contact Phone Number: \_\_\_\_\_  
Contact Email Address: \_\_\_\_\_

**REQUEST FOR PROPOSALS (RFP) NO: 18-81  
SJC TOURISM MARKET RESEARCH AND ECONOMIC IMPACT STUDY**

**Full Legal Company Name:** \_\_\_\_\_

**ATTACHMENT "5-A"**  
**PROJECT APPROACH / METHODOLOGY**  
(Attach or insert copy here)

**REQUEST FOR PROPOSALS (RFP) NO: 18-81  
SJC TOURISM MARKET RESEARCH AND ECONOMIC IMPACT STUDY**

**ATTACHMENT "5-B"**

**PROPOSED SCHEDULE/TIMELINE FOR IMPLEMENTATION OF DELIVERABLES**

(Attach or insert copy here)

**REQUEST FOR PROPOSALS (RFP) NO: 18-81  
SJC TOURISM MARKET RESEARCH AND ECONOMIC IMPACT STUDY**

**Full Legal Company Name:** \_\_\_\_\_

**ATTACHMENT "6-A"**

**PROJECT STATUS REPORT**

(Complete and Submit, include projects in progress or anticipated within next 12 to 24 months)

**1. Name of Project:** \_\_\_\_\_

Project Description: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Location: \_\_\_\_\_

Owner Name: \_\_\_\_\_

Start Date/Anticipated Start Date: \_\_\_\_\_ Scheduled Completion Date: \_\_\_\_\_

**2. Name of Project:** \_\_\_\_\_

Project Description: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Location: \_\_\_\_\_

Owner Name: \_\_\_\_\_

Start Date/Anticipated Start Date: \_\_\_\_\_ Scheduled Completion Date: \_\_\_\_\_

**3. Name of Project:** \_\_\_\_\_

Project Description: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Location: \_\_\_\_\_

Owner Name: \_\_\_\_\_

Start Date/Anticipated Start Date: \_\_\_\_\_ Scheduled Completion Date: \_\_\_\_\_

**SJC TOURISM MARKET RESARCH AND ECONOMIC IMPACT STUDY**

**Full Legal Company Name:** \_\_\_\_\_

**ATTACHMENT "6-A" (Continued)**

**PROJECT STATUS REPORT**

(Complete and Submit, include projects in progress or anticipated within next 12 to 24 months)

**4. Name of Project:** \_\_\_\_\_

Project Description: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Location: \_\_\_\_\_

Owner Name: \_\_\_\_\_

Start Date/Anticipated Start Date: \_\_\_\_\_ Scheduled Completion Date: \_\_\_\_\_

**5. Name of Project:** \_\_\_\_\_

Project Description: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Location: \_\_\_\_\_

Owner Name: \_\_\_\_\_

Start Date/Anticipated Start Date: \_\_\_\_\_ Scheduled Completion Date: \_\_\_\_\_

**6. Name of Project:** \_\_\_\_\_

Project Description: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Location: \_\_\_\_\_

Owner Name: \_\_\_\_\_

Start Date/Anticipated Start Date: \_\_\_\_\_ Scheduled Completion Date: \_\_\_\_\_

**(Use additional or supplemental pages as needed)**

**REQUEST FOR PROPOSALS (RFP) NO: 18-81  
SJC TOURISM MARKET RESEARCH AND ECONOMIC IMPACT STUDY**

**ATTACHMENT "7-A"**

**OFFICIAL PRICING PROPOSAL FORM**

The following proposal is presented for:

**SJC TOURISM MARKET RESEARCH AND ECONOMIC IMPACT STUDY**

**TOTAL PROPOSED AMOUNT: \$ \_\_\_\_\_**  
(Cost of all deliverables)

Total Proposed Amount: \$ \_\_\_\_\_ / 00  
(Amount Written in Words)

Each Respondent shall insert the Total Proposed Amount in both numerals and words for services requested under this sealed RFP. If there is a discrepancy, the amount written in words shall prevail as the correct proposed amount.

In the event of a discrepancy, the County shall calculate the Total Proposed Amount to determine the lowest, responsive, responsible Respondent.

Each Respondent shall submit the unit hourly rates per deliverable and total number of hours proposed in the table below. Hourly rates shall dictate the total proposed amount submitted on the Official County Pricing Proposal Form above. Failure to submit hourly prices for the identified deliverables may result in removal from consideration for award of a contract. The County also reserves the right to utilize the Hourly Rates submitted below for additional, as needed, services.

**PRICING PROPOSAL FORM**  
**ITEMIZED PRICING SCHEDULE FOR TASK DELIVERABLES**  
**HOURLY RATES PER DELIVERABLE**

<b>TASK/DELIVERABLE</b>	<b>HOURLY RATE</b>	<b>X</b>	<b>TOTAL # OF HOURS PROPOSED</b>	<b>=</b>	<b>TOTAL COST TO COUNTY</b>
<b>Task # 1: Familiarization and Development of Survey and Methodology</b>					
	\$	X		=	\$
	\$	X		=	\$
	\$	X		=	\$
	\$	X		=	\$
<b>Task # 2: Data Collection</b>					
	\$	X		=	\$
	\$	X		=	\$
<b>Task # 3: Evaluation and Reporting</b>					
	\$	X		=	\$
	\$	X		=	\$
	\$	X		=	\$
	\$	X		=	\$
<b>TOTAL COST FOR ALL DELIVERABLES (TASK #s 1-3)</b> Total of itemized deliverables must equal Total Proposed Amount on previous page of the official Pricing Proposal Form					\$

**RFP 18-81**

During the preparation of the RFP, the following addenda, if any, were received:

No.: \_\_\_\_\_ Date Received: \_\_\_\_\_ No.: \_\_\_\_\_ Date Received: \_\_\_\_\_  
No.: \_\_\_\_\_ Date Received: \_\_\_\_\_ No.: \_\_\_\_\_ Date Received: \_\_\_\_\_

The undersigned declares that the statements and representations made in this proposal are true in every respect and that the said proposal is in all respects fair and made without collusion or fraud, and that no member of the Board of County Commissioners, or any other agent or employee of the County, director or indirectly, is interested in this proposal or in any profits expected to accrue therefrom.

FULL LEGAL COMPANY NAME: \_\_\_\_\_

MAILING ADDRESS: \_\_\_\_\_

MINORITY OR WOMAN OWNED BUSINESS: \_\_\_\_\_

FEDERAL ID NUMBER OR SOCIAL SECURITY NUMBER: \_\_\_\_\_

SIGNATURE OF AUTHORIZED REPRESENTATIVE: \_\_\_\_\_

\_\_\_\_\_  
(Typed/Printed Name of Authorized Representative)

TITLE OF REPRESENTATIVE: \_\_\_\_\_

DATE OF SIGNATURE: \_\_\_\_\_

TELEPHONE NO: \_\_\_\_\_

FAX NO: \_\_\_\_\_

EMAIL ADDRESS: \_\_\_\_\_

**PART VIII: OPTIONAL CHECKLIST**

**REQUEST FOR PROPOSALS (RFP) NO: 18-81  
SJC TOURISM MARKET RESEARCH AND ECONOMIC IMPACT STUDY**


<b>SECTION</b>	<b>RFP PACKAGE COMPONENTS</b>	<b>CHECK BOX</b>
<b>Section 1</b>	Cover Page	
<b>Section 2</b>	Cover Letter	
<b>Section 3</b>	Company & Staff Qualifications and Resources:	
	Attachment "3-A" – Licenses/Permits/Certifications	
	Attachment "3-B" – Certificates of Insurance	
	Attachment "3-C" – Claims, Liens, Litigation History	
	Attachment "3-D" – Company Organization Chart	
	Attachment "3-E" – Project Team Organization Chart	
	Attachment "3-F" – Key Personnel List	
	Attachment "3-G" – List of Proposed Sub-Consultants	
<b>Section 4</b>	Related Experience:	
	Attachment "4-A" – Previous Experience Narrative	
	Attachment "4-B" – References	
<b>Section 5</b>	Project Approach / Methodology	
	Attachment "5-A" – Project Approach / Methodology	
	Attachment "5-B" – Proposed Schedule/Timeline for Deliverables	
<b>Section 6</b>	Attachment "6-A" – Project Status Report	
<b>Section 7</b>	Pricing Proposal	
	Attachment 7-A – Pricing Proposal	
<b>Section 7</b>	Other Required Forms:	
	Attachment "A" – St. Johns County Affidavit	
	Attachment "B" – Affidavit of Solvency	
	Attachment "C" – Drug-Free Workplace Form	
	Attachment "D" – Conflict of Interest Disclosure Form	
	Acknowledged (signed) Addenda	

**PART IX: SEALED RFP MAILING LABEL**

**REQUEST FOR PROPOSALS (RFP) NO: 18-81  
SJC TOURISM MARKET RESEARCH AND ECONOMIC IMPACT STUDY**

**Cut along the outer border and affix this label  
to your sealed RFP envelope to identify it as a  
"Sealed RFP"**

<b>SEALED RFP • DO NOT OPEN</b>	
SEALED RFP NO.:	<u>18-81</u>
RFP TITLE:	<u>SJC Tourism Market Research and Economic Impact Study</u>
DUE DATE/TIME:	<u>Thursday, August 23, 2018 @ 4:00 p.m.</u>
SUBMITTED BY:	_____
	Company Name
	_____
	Company Address
	_____
	Company Address
DELIVER TO:	St. Johns County Purchasing Dept. ATTN: Travis Hembree 500 San Sebastian View St St. Augustine FL 32084



**END OF DOCUMENT**



## St. Johns County Board of County Commissioners

Purchasing Division

August 09, 2018

### ADDENDUM #1

**To: Prospective Respondents**  
**From: St. Johns County Purchasing Department**  
**Subject: RFP No. 18-81, St. Johns County Tourism Market Research & Economic Impact Study**

This Addendum #1 is issued for further respondent's information and is hereby incorporated into the RFP documents. Each respondent will ascertain before submitting a proposal that he/she has received all Addenda, and **must return an original copy of this signed Addendum with the submitted proposal to the St. Johns County Purchasing Department; Travis Hembree, Procurement Coordinator; 500 San Sebastian View; St. Augustine, FL 32084.** An electronic copy must also be included with the electronic copy of the submitted proposal.

#### QUESTIONS:

1. Would you consider utilizing data from a syndicated study that measures the same areas of interest that you have indicated instead of custom data collection?

It is possible to supplement the visitor data collected in St. Johns County with data from a syndicated study; however, the selected contractor must be willing and able to collect tourism industry specific data from across the County for a minimum of one week (Sunday- Saturday) per month for a 12-month period

2. How many stakeholder interviews do you anticipate being conducted for this study?

The methodology for gathering stakeholder input determines the total number of interviews needed. Typically we suggest conducting 2 public meeting style input sessions with six to eight individual interviews to accommodate key stakeholders or interest groups who were not represented at the meetings.

3. Under Part IV, Contract Requirements, Section A (page 9), the text indicates that the (initial) contract term shall be effective for a period of one year. However, the scope of work appears to contemplate a period longer than one year as it includes time for survey development, followed by twelve months data collection, and then the evaluation of the data (results, economic impact, etc.) Does the County anticipate modifying the contract one year after award to accommodate the entire scope of work, or will the initial contract provide sufficient time to conclude the project (i.e., be longer than one year)?

The contract term will be eighteen (18) months to allow sufficient time for both the one year data collection project and subsequent analysis and presentation of the data and findings.

4. Have you conducted this research in the past? And if so, how important will it be to maintain tracking and be able to compare to the past?

No.

5. If you have conducted this research in the past, are there reports available for review?

No.

6. As described in the RFP, it sounds as if the anticipated data collection method is in-person intercepts for at least one week per month. Are you open to other methodologies?

Data must be collected from St. Johns County visitors for a minimum of one week per month for a twelve (12) month period. The RFP does not require in-person intercepts as the methodology to acquire or collect the data.

7. As described, there are two distinctly different deliverables – visitor profile and economic impacts. Are you open to awarding these separately and/or having vendors bid on specific pieces?

One contract will be awarded for this project. The awarded Contractor to the RFP may establish relationships with subcontractors as needed to meet all the requirements and deliverables of the RFP.

8. What kinds of decisions will be made from the data requested in the RFP? Are you looking to understand target markets, potential audiences and creative messages or is it designed to be reportive to the community.

St. Johns County desires to obtain a study which includes at a minimum the information outlined in the RFP. The document will be made available to the community and used to guide future tourism related decisions as appropriate.

9. Is there an anticipated budget for the project?

A budget has not been set for this project.

**THE RFP DUE DATE REMAINS AUGUST 23, 2018 AT 4:00 P.M.**

**Acknowledgment**

**Sincerely,**

\_\_\_\_\_  
Signature and Date

Travis Hembree  
Procurement Coordinator

\_\_\_\_\_  
Printed Name/Title

\_\_\_\_\_  
Company Name (Print)

**END OF ADDENDUM NO. 1**