



Hello!

The Great Lakes Bay Region Quality of Life Council and Great Lakes Bay Regional Convention & Visitors Bureau invites your organization to submit a response to the following Request for Proposals [RFP (s)]:

1. **Recovery Communications Strategy**
2. **Strategic Recovery Planning Services**
3. **Tourism Master Plan**
4. **Experience Development Plan**

Please submit an individual (stand-alone) response for each project or projects for which you wish to be considered. Each RFP will be awarded independently. Qualifying organizations may apply for and be awarded more than one project. Please read all information and instructions carefully before submitting your proposal (s). Incomplete proposals will not be processed.

Responses must be submitted in accordance with the instructions set forth in the attached RFP (s). We reserve the right to amend, by addendum, any, or all the RFP documents prior to the final proposal submittal date. It is the proposer's responsibility to check for addenda to the RFP (s) and comply with new or revised requirements that may be stated therein.

Project Submittal Date

To be considered, submitted proposals for the project or projects for which you wish to be considered must be received by the Great Lakes Bay Region Quality of Life Council office no later than 5:00 pm EDT, Thursday, August 19, 2021. Those who do not comply completely with RFP (s) requirements, will not be considered.

We greatly appreciate your time and look forward to reviewing your proposal(s).

Sincerely,

Annette M. Rummel, Ph. D.

CEO-Travel Trailblazer

Great Lakes Bay Regional CVB

515 N Washington Avenue, 2nd Floor

Saginaw, MI 48607

800.444.9979

515 N. Washington Avenue, Floor 2, Suite A, Saginaw MI 48607
Main 989.752.7164 Toll Free 800.444.9979 Fax 989.752.6642

Great Lakes Bay Region Quality of Life Council
&
Great Lakes Bay Regional Convention & Visitors Bureau
Request for Proposal: **Tourism Master Plan**

Submission Format: Electronic Submission is Required

Issue Date: July 20, 2021

Proposal Due Date: August 19, 2021

Project Start Date: September 02, 2021

Project End Date: June 01, 2022

Issuing Office: Great Lakes Bay Region Quality of Life Council (The Foundation) (dba, Go
Great Foundation)
515 North Washington Avenue, FLOOR 2, Suite A
Saginaw, Michigan 48607-1385

Contact: Annette M. Rummel, President & CEO
(989) 245-1223
annette@gogreat.com

SECTION I: General Information and Application Process SECTION II:
Requirements for Tourism Master Planning Services SECTION III: Proposal
Qualifications, Work Samples & Services SECTION IV: Proposal Forms &
Exhibits

The Applicant is responsible for understanding all information contained in this RFP. Read all information carefully before submitting your proposal. If you have any questions about the RFP or Process, please contact Annette M. Rummel by email. Incomplete proposals will not be processed. You will not be notified if your proposal is incomplete. The Foundation/Bureau may or may not contract for work with any firm or firms that submit proposal materials and reserves the right to end this Process or modify the anticipated work at its sole discretion.

SECTION I: GENERAL INFORMATION AND APPLICATION PROCESS

The United States Department of Commerce Economic Development Administration holds the material rights/ownership of the completed plan.

The Foundation serves as the fiduciary for this project. The Tourism Master Plan must comprehensively address the functions of the Foundation, the Great Lakes Bay Regional Convention & Visitors Bureau, and the three (3) County CVB organizations.

[About the Great Lakes Bay Region Quality of Life Council \(The Foundation\)](#)

The Foundation is organized exclusively to benefit the residents and visitors to the Michigan Counties of Bay, Midland, and Saginaw (the Region). Projects are selected that serve to improve the quality of life, sense of place, remediate gaps within the leisure time activity space, increase tourism, and serve to retain and attract talent. The Foundation accomplishes this through scientific, educational, economic development, and charitable activities keeping collaboration with other organizations a priority.

[About the Great Lakes Bay Regional Convention & Visitors Bureau](#)

The Great Lakes Bay Regional Convention & Visitors Bureau (The Bureau) serves as the regional destination marketing and management organization. The Bureau serves as the collaborative marketing organization for the Michigan Counties of Bay, Midland, and Saginaw and their individual Convention & Visitors Bureau organizations. The current mission of the Bureau is to increase overnight lodging stays, contributing to economic growth within our Region.

[Background](#)

A comprehensive Foundation/Bureau Strategic Plan and Communications Strategy is being prepared that will address visitation levels, sales goals and targets, and travel habits to and within our destination, along with current customer segments' arrival information. The Tourism Master Plan Contractor will receive complete access to this information to leverage within their planning efforts. The goal of the Foundation/Bureau is to ensure no duplication of effort occurs during this planning Process. The work associated with developing the Tourism Master Plan for the Foundation/Bureau should be focused on destination assessment, product retention, expansion, attraction and development, Key Performance Indicators (KPIs) identified, and the methodology clearly identified, prioritization of efforts and recommendations for funding identified.

A Tourism Master Plan will allow our community to take a strategic approach to define a competitive positioning for our region as a destination. This plan is a critical step in identifying and prioritizing those opportunities for enhancements to the resident and visitor experience that will position the community as a desirable place to live, work and visit, and extend the benefits of the visitor economy throughout our community.

In the immediate aftermath of the Covid-19 crisis and the devastating 100-year Flood, this plan will help our community and stakeholders understand the status of hospitality and tourism enterprises, identify the travel sector businesses lost to the crisis, those that were added during the event, and what to target to maximize the draw to our Region.

We must also prepare for the long-term and develop a plan to balance sustainable visitor growth with our community's long-term health and vibrancy. The Tourism Master Plan will

connect the visitor economy, economic development, and community

3

well-being by aligning our focus and efforts. Working hand in hand with our stakeholders and community, we will develop a plan that ensures economic sustainability for our community while preserving the quality of life for residents and the quality of place for visitors.

This Process must include extensive stakeholder and community engagement to develop an agreed-upon strategic vision for tourism's future within our Region. The Process must engage industry stakeholders, business leaders, elected officials (on all levels), the public sector, and the broader communities within and representing the Michigan Counties of Bay, Midland, and Saginaw. Stakeholder engagement may include meetings, gatherings, surveys, interviews, focus groups, town hall meetings, and workshops.

This Process must:

- Create public and transparent operational approach processes so all interested parties can see the activities taking place, monitor project status, and be assured the deliverables are on target
- Create an “apolitical” project environment with an independent and unbiased approach to the issues at hand to help assure that all stakeholders receive the best recommendations and advice possible
 - Create several methods of input and collaboration with stakeholders from all interested groups (tourism industry, government, elected officials, community residents, etc.), so there is ample opportunity to contribute wide-ranging and diverse opinions to the project

SECTION II: REQUIREMENTS FOR TOURISM MASTER PLANNING SERVICES

The resulting Tourism Master Plan **must deliver the following items:**

- Consumer research and market analysis
- Destination assessment to assess the strength of their region's visitor economy and infrastructure
- Asset map of visitor experiences to determine the makeup of tourism assets in the destination, what assets are operational, and which assets are primary demand generators
- Stakeholder interviews
- Industry focus groups
- Public town hall meetings

- Product gap analysis to understand development opportunities including but not limited to:

4

- A vision for how our community should shape and plan our physical/geographic assets to create a stronger sense of place
 - Addresses where and what our Region currently offers by completing a comprehensive destination assessment. This includes, but is not limited to, mapping all the sites/assets within the 3 County Region, identifying in detail what exists within our Region (public sector, private sector, natural environment, man-made environment, etc.), and recommending strategies for these assets to be retained, enhanced, marketed more effectively, drive additional sales, diversify, and grow. Also, considering the industries within our Region (agriculture, manufacturing, healthcare, education) not traditionally associated with the travel sector to identify strategies for these assets to be leveraged by the travel sector customer
- Addresses where we want to go by the development of a destination vision. Mapping recommended sites within the 3 County region where gaps exist while ensuring that site recommendations complement and expand the product offering, maximize returns, and increase visitation to a sustainable level. Identify use for, and new uses of, underutilized areas. Identifying, measuring, and valuing project ideas and those that will be recommended measuring the potential value to the destination and identifying potential funding sources
- Identify placemaking opportunities for tourism generation, talent attraction and economic development
- Addresses in detail how to get to where we want to go, including a positioning strategy for the future of our visitor economy, identify products, amenities, programming, and experiences that will guide the long-term and leveraging a sustainable plan and design for our Region
- Situational analysis
- Visioning workshops with key stakeholders
- Prepare and deliver the Tourism Master Plan

[Process](#)

Develop and execute a complete planning process with clear timelines, milestones, and significant stakeholder engagements to support the Purpose, which comprises key phases with elements including but not limited to:

- **Groundwork:** Determine planning theory, planning framework, and decision-making model
- **Discovery:** Evaluate existing inputs (both formal research and anecdotal) from all stakeholders, the information provided by the Foundation/Bureau, and identified by the Applicant (list the resources in the RFP). This includes but is not limited to inputs from the following sources: consumer research, market analysis, all social media and electronic channels, strength of the visitor economy, the Region's infrastructure, the Foundation/Bureau, tourism industry, residents, visitors, governmental and elected officials, etc. Identify any significant input gaps and identify solutions to address these gaps. Actions to identify solutions may include obtaining best practices, grant providers, research, leading interviews, hosting listening sessions and/or conducting focus groups, and performing internal staff engagements. Clarify and articulate the ultimate inputs for planning decision-making
- **Prioritization:** Analyze and assess the greatest areas of need for change based on inputs and identify where the Foundation/Bureau can and should have the most impact on the change needed. Prioritize no more than thirty (30) overall areas of focus and/or projects – the top ten (10) projects in priority order for each County
- **Strategize:** Craft a ten (10) year strategic vision for the priority areas of focus that serve as the ultimate aligning force. Determine a set of clearly defined outcomes to achieve during the implementation timeframe. Develop phased strategic goals that support the focused impacts to be achieved. Identify what key initiatives and activities will produce the desired results
- **Indicators:** Determine a set of key performance indicators (KPIs) and install a system at the Foundation/Bureau for efficiently monitoring the KPIs. This serves to hold the Foundation/Bureau accountable and helps drive us to reach the intended outcomes in the Plan
- **Infrastructure:** Assess the Foundation/Bureau's assets and recommend what is necessary to support the recommendations of the Tourism Master Plan and determine any needed structural and staffing implications. Capture proposed destination projects within one plan. Organize the projects into a destination and experience development framework
- **Operationalize:** Break the ten-year plan into two phases, build a detailed phase one (five years) 2023-2027 action plan and budget complete with a clear program of work, tactics, and outputs and clarified roles and capacity, which all support the ten-year vision, priority focus areas and outcomes
- **Feedback:** Build an opportunity for public comment on the draft 2023-2032 Tourism Master Plan and the 2023-2027 Budget in November of 2022. The Foundation/Bureau's Board of Directors will consider plan adoption during their regularly scheduled December 2022 meeting

Implementation

In effect on June 01, 2022, the Plan and Budget will need clear work planning and management methods to realize the key outcomes, track accountability and progress, and minimize internal conflicts. Staff will need to be galvanized, aligned, and empowered to begin implementing actions.

The final 2023-2032 Foundation/Bureau Tourism Master Plan and 2023-2027 Budget document must be designed leveraging the Foundation/Bureau's brand, be simple to understand, succinct, visually engaging, and incorporate Destinations International's tourism lexicon language.

SECTION III: PROPOSAL QUALIFICATIONS, WORK SAMPLES & SERVICES

Qualifications

The proposal should demonstrate the firm's range of relevant expertise and capabilities in conducting comprehensive Tourism Master Planning and services, including but not limited to:

- Human-centered, innovative, inclusive, sustainably focused, and value-based work
- Strong facilitation and conflict management skills (both in-person and virtually), including the ability to facilitate both intimate and large groups with multiple breakout components taking place simultaneously
- Diversity, equity and inclusion awareness, and frameworks
- Design-thinking, theory of change and/or impact focus planning acumen • Leadership and organizational development, restructuring and change management skills • Research, data collection, and analytical abilities
- Robust communication and writing services, as well as the ability to represent complex material and data in simple visual formats such as infographics
- Solid project management skills

Within the Statement of Qualifications, please provide the following as well as any additional information, experiences, or activities for consideration:

- Company background that lists all location(s) of office(s) and which the primary work for this contract would be performed
- Company mission statement
- Company equity, diversity and/or inclusion statement or policy

- Travel sector and/or destination development related experience
- Bios, resumes and contact information for all team members (and any subcontractors) who would play a role in the execution of the work
- Identify the roles and responsibilities of each team member who will service the account and the estimated percentage of time each will spend on the project, as well as the hourly rate of each member and the overall project cost estimates

[Conflict of Interest](#)

The proposal should identify any ownership, staff, board, and client relationships that could potentially be considered a conflict of interest.

[Budget](#)

The proposal must include a detailed budget for all phases and services provided to complete the Purpose. The budget is not to exceed \$200,000.00.

[Application Format](#)

Applicants are required to submit all Application materials by email in PDF form. We recommend you retain copies of your application materials for your records.

IT IS INCUMBENT ON THE APPLICANT TO ENSURE ALL REQUIRED PROPOSAL MATERIALS ARE SUBMITTED.

Please note that the Foundation is a 501(c) 3 corporation located in Michigan. Any materials or inquiry made relative to this RFP will be treated as unclassified and, with the approval of the President & CEO, available for review and inspection.

Please limit the response document to no more than 20-pages in length. **Please do not include the following documents within the 20-page limit:**

- Examples of work
- Resumes
- Bios
- Certification documents

Submit electronic application material to Annette M. Rummel by email at annette@gogreat.com

Subject line: Tourism Master Planning Service RFP – Insert Applicant Name Here

[Incomplete Applications Materials](#)

The Applicant is responsible for all information requested and contained in this application. Please read all information and instructions carefully before submitting your materials. Incomplete proposals will not be processed. Applicants will not be notified if submitted materials are incomplete.

General Information

The guidelines and specifications contained in this RFP will be considered a part of any contract awarded for the Tourism Master Planning Services. Read the entire RFP carefully and thoroughly.

All Applicants requesting to contract for the Tourism Master Planning Services will be required to complete a proposal and submit materials. Proposals including all Addenda and attachments may be made available through the Foundation/Bureau's website or by contacting the Foundation/Bureau and gaining the President & CEO's approval.

The Foundation/Bureau may publish any questions received, and responses provided and advertise all Addenda on the Foundation/Bureau's website.

The Applicant is solely responsible for checking with the President & CEO to determine whether any Addenda have been issued. Addenda are incorporated into the RFP by this reference.

Once completed Proposal materials are received, the Foundation/Bureau will process proposal materials, determine if any Applicants are qualified to provide services, and execute the effective contract(s). The turnaround time frame is subject to change based on workload and solely at the discretion of the Foundation/Bureau.

Submission of a proposal, materials, or prior contracting for the Tourism Master Planning Services does not imply or guarantee that an Applicant will receive a contract.

Proposal Process

Applicants must successfully meet all requirements of the RFP to contract with the Foundation/Bureau. The Applicant is responsible for all information contained in this proposal and materials submitted. Please read all information and instructions carefully before submitting your proposal. Incomplete proposals will not be processed. Materials submitted by the Applicant will not be returned to the Applicant.

The Foundation/Bureau reserves the right to award a contract based solely upon information submitted. The Foundation/Bureau may also choose to request additional information or conduct interviews to clarify or answer questions the Foundation/Bureau may have in conjunction with the written responses to this request.

At any point, the Foundation/Bureau may decide that an Applicant's response to any one or more of the proposal questions in this RFP or as provided in materials submitted by Applicant is sufficiently inadequate, so-as-to, disqualify the Applicant from providing services. The

Foundation/Bureau may withdraw, re-open, or otherwise amend the RFP at any time and to reject any or all proposals and materials, in whole or in part, when the Foundation/Bureau determines that it is in its best interest to do so.

An Evaluation Committee consisting of Foundation/Bureau staff will review each proposal and submitted materials and determine if the Applicant is qualified to perform the desired services. The Foundation/Bureau reserves the right to consider as part of the evaluation verification of references, feedback from an Advisory Committee, previous performance, and financial stability as these areas relate to the performance of duties under any contract resulting from this proposal.

Upon awarding a contract, the Contractor will be placed on a list of approved Contractors for the Tourism Master Planning Services. An awarded contract does not automatically authorize services or guarantee referrals.

The Contractor must provide all services following the specifications and requirements of an awarded contract between the Contractor and the Foundation/Bureau. Contact the President & CEO to obtain a copy of the specifications and requirements. Applicants must agree to abide by the guidelines outlined in an awarded contract and these RFP materials.

The Foundation/Bureau may request services to be performed by an awarded Contractor with a written Notice-to-Proceed or similar work authorization document.

The Foundation/Bureau cannot predict a long-term need for these services and does not guarantee any volume of business will be offered to any Applicant who qualifies to provide services, nor is there any guarantee that the Foundation/Bureau will continue to use the services of any Applicant who is issued a contract.

The Foundation/Bureau reserves the right to enter a new contract or amend any contract resulting from the application one or more times for changes in terms, conditions, time, money, services, or any combination of the foregoing. The Foundation/Bureau will have no obligation to amend and extend the contract and incur no liability for electing not to exercise its option.

[Review Process](#)

The proposals received and completed following the RFP directions will be reviewed and ranked by the Evaluation Committee made up of the Foundation/Bureau staff for their consideration and designation. In addition to the primary evaluation factor of quoted cost or price, the Evaluation Committee will also consider:

- **Qualifications:** The Proposal demonstrates the ability, capacity, and innovation to execute the project successfully
- **Scope of Work:** The Proposal demonstrates a skillful understanding of the Purpose, phases, and desired results and demonstrates a well-thought-out process with a work plan, timeline, and additional considerations to achieve the desired Purpose

- Budget: Proposal includes a budget for each phase of the project and compares favorably with others submitted on cost per level of services
- The Proposal contains sufficient information to complete all the requirements identified in the RFP
- Creativity: Proposal contains added value items, creative and state of the art processes with a work plan, timeline, and additional considerations to achieve the desired Purpose

Tentative Time Frame

The deadline for proposals is 5:00 p.m. (EDT) August 19, 2021. Applicants will be notified within two (2) weeks after the proposal due date about the next steps in this process. The Foundation/Bureau retains the right to alter this tentative time frame at any time at its discretion. The Foundation/Bureau reserves the right to reject any individual or all proposals, or any part thereof, and accept the proposal that best meets the needs of the Foundation/Bureau. All submitted documentation and completed work become the property of the Foundation/Bureau. Proposals received after the proposal deadline will not be accepted.

Proposal Due 5:00 p.m. (EDT) 08/19/2021 Internal Review Period 08/20/2021 thru 08/23/2021 E-Notice of intent to proceed with formal interview 08/23/2021
Formal interviews (virtual Zoom presentations) 08/24/2021 thru 08/26/2021 E-Notice of intent to award contract 08/27/2021

Services and Rates

Contracted services require authorization through a written, executed contract that specifies types, amounts, and duration of services to be provided before work commences. The Foundation/Bureau will not reimburse for services outside the scope of the contract or for work completed without prior Foundation/Bureau authorization.

The Foundation/Bureau will pay a Contractor for any services listed in the resulting contract at approved-upon rates. The Foundation/Bureau reserves the right to negotiate rates and consideration with an Applicant before an awarded contract. If the Foundation/Bureau and Applicant cannot agree upon consideration, a contract will not be issued to the Applicant.

Fully Executed Agreement

Work under an awarded contract CANNOT begin until the Foundation/Bureau has a fully executed contract. Any successful Contractor shall complete only the specific services identified and authorized in writing (email acceptable) by the Foundation/Bureau designee. The contract Statement of work (or the “WORK”) will outline approved details such as location and services to be performed.

Under no circumstances should services be rendered without written authorization and a contract which details the services which are being authorized.

The Foundation/Bureau will not compensate a Contractor for any services provided by the Contractor before a contract is fully executed. In addition, the Foundation/Bureau will not pay the Contractor for services that exceed the number of approved services.

[Other Contract Responsibilities](#)

All Contractors will be expected to participate in the Foundation/Bureau business meetings about the Contract as requested. This is considered business best practice. Business meetings may include participation in conference calls, videoconferences, quality assurance surveys, and monitoring activities that the Foundation/Bureau may require.

[Insurance Requirements](#)

Before executing any contract, a Contractor must provide proof of current insurance coverage for an awarded contract as required by the Foundation/Bureau. A Contractor must maintain the required insurance coverage throughout the duration of an awarded contract. The standard insurance requirements are indicated below within this RFP. The Foundation/Bureau may negotiate insurance coverage based on the risk level of an awarded contract. The Contractor shall provide copies of the insurance certificate(s) as part of this application.

[Confidentiality](#)

It is understood that any materials submitted to the Foundation/Bureau, including proposals, documents, correspondence, or other materials, may be made public upon request to and the approval of the President & CEO. The Evaluation Committee and Board of Director Members will also review proposals and accompanying materials submitted. The Foundation/Bureau does not guarantee the confidentiality of any materials received.

[Other Considerations](#)

[Material Rights/Ownership](#): Materials developed and produced by Contractors pursuant to the Tourism Master Plan Services identified here or because of contracting with the Foundation/Bureau is directly owned by the Foundation/Bureau and the EDA. Materials may not be repurposed or republished by the Contractor, their employees, or subcontractors in whole or in part without expressed written consent from the Foundation/Bureau. [Acceptance/Rejection of Proposals](#): The Foundation/Bureau reserves the right, at its sole discretion, to reject any application proposals or materials received that do not meet the stated criteria or include the required elements identified in this document to the satisfaction of the Foundation/Bureau.

[RFP Questions/Clarifications](#): Questions regarding the RFP Process must be emailed to Annette M. Rummel at annette@gogreat.com. The Foundation/Bureau retains the right to publish all posed questions in all forms and on the Foundation/Bureau's website.

Cost for Preparation of Proposals: The Foundation/Bureau is not responsible under any circumstances for any costs incurred due to the preparation or submission of the respondent's proposals.

Equal Opportunity: The Foundation/Bureau encourages minority and women-owned businesses to submit proposals in response to this RFP. The Foundation/Bureau strongly prefers Michigan-based companies.

Applicant Materials Submittal Requirements

An Applicant will not receive a contract award under this RFP unless the Evaluation Committee and the Foundation/Bureau determine that the Applicant meets the requirements described in Section I of this RFP and demonstrate to the Evaluation Committee and the Foundation/Bureau's satisfaction that the Applicant can perform the proposed services. In addition, the Foundation/Bureau will assess the Applicant's ability to perform the proposed services to the Evaluation Committee's satisfaction based on the Applicant's responses as identified in Section III of the RFP.

Supplemental Questions and Required Materials for Persons Applying for Tourism Master Planning Services

To be considered, submissions must be complete and include the following:

Cover letter (not to exceed two pages): A dated cover letter describing the relevant training, education, and experience you have, including background, clients, experience, and specific areas of expertise concerning the scope of work outlined. The letter must be signed by an official who has the authority to enter into a service agreement on behalf of the Applicant.

Strategy (not to exceed three pages): Based on project objectives, describe the strategy you would propose to support the scope outlined above and how you would measure success.

Key personnel (not to exceed one page per biography): Provide a professional biography or summary for the personnel who will be working with the Foundation/Bureau.

Fees/value & proposed budget (not to exceed one page):

- Using the form contained within this RFP, outline costs and hourly rate for personnel who will be assigned to the project. Identify billing methods for mobilization (travel time). Transportation costs, meals, and lodging are reimbursable
- List any cost savings and/or value-added proposals offered
- Outline costs and hourly rate for subcontractors you would propose to have work on the project. Identify the rate inclusive of work in proximity to the primary place of business and the rate of work involving at least an hour's travel

- Outline the scope of work, study design, activities included. List and describe the primary and/or secondary data needed for this project, expected metrics and outcomes, concerns, timeline, and estimated costs. The proposed cost breakouts should correspond to the expected outcome breakdowns

[Links to portfolio/comparable work \(not to exceed one page\)](#): Share links or provide work samples to comparable digital assets produced by key personnel and describe their role in developing assets.

[References](#): Using the form contained within this RFP, provide a list of at least three business references for which the firm has provided similar services. Include a contact name, organization's name, email, web address, phone number, and relationship for each reference.

SECTION IV. PROPOSAL FORMS & EXHIBITS

FORM A
Great Lakes Bay Region Quality of Life Council
&
Great Lakes Bay Regional Convention & Visitors Bureau
Tourism Master Planning Services Proposal
COVER SHEET

Refer to the respective question number on all additional pages used for your application. When possible, use the application format. Check your application carefully to ensure you have submitted all required information and materials. Incomplete applications may be disqualified.

Applicant's Name (if applying as a business, use registered business name):

Primary Contact Person: _____ Title: _____

Business Address: _____

City, State, ZIP (Postal Code): _____

Mailing Address (if different than above): _____

Office #: _____ Cell Phone #: _____

Email address: _____

Name and title of the person (s) authorized to represent the Applicant in any negotiations and sign any Contract that may result:

Name: _____ Title: _____

Statement of acceptance of the terms and conditions contained in the Application:

I hereby acknowledge and agree that I have read and understood all the terms and conditions in the Application.

I hereby agree to use recyclable products to the maximum extent economically feasible in the performance of the work outlined in the Application.

business or economic interests of Applicants, its employees, or its agents, on the one hand, and the business or economic interests of the Foundation/Bureau, on the other hand, arising out of or relating in any way to, the subject matter of the RFP. Proposer shall provide prompt written notification to the Foundation/Bureau of any change occurring concerning the Applicant's business or interests which is reasonably likely to result in (or has resulted in) an actual or potential conflict between the business or economic interests of the Applicant and those of the Foundation/Bureau, arising out of, or relating in any way to, the subject matter of the RFP.

In its notice, the Applicant will describe the nature of such actual or potential conflict of interest or remuneration in question in reasonable detail.

I certify that the information I have provided is correct. I understand that any misrepresentations or incorrect information provided to the Foundation/Bureau can result in the disqualification of my application.

Authorized Signature: _____ Date: _____

Printed Name: _____

The Applicant agrees that the rates charged to the Foundation/Bureau for services shall not exceed the Applicant's customary rates for comparable services.

Please include your all-inclusive hourly rates for all employees who will work on the Tourism Master Plan, including meetings, consultation, presentations, travel expenses, and all other expenses. If there are different rates for one type of work or another, please add additional information as appropriate:

Hourly or Flat Rates: \$ _____ (Location of services **within 50 miles** of Applicant's business or residence)

Hourly or Flat Rates: \$ _____ (Location of services **outside 50 miles** of Applicant's business or residence)

Hourly or Flat Rates: \$ _____ (Other services, indicate type here: _____)

Please include subcontractor all-inclusive rates, including traveling expenses for services connected to the Tourism Master Plan work:

Hourly or Flat Rates: \$ _____ (Location of services **within 50 miles** of Applicant's business or residence)

Hourly or Flat Rates: \$ _____ (Location of services **outside 50 miles** of Applicant's business or residence)

Hourly or Flat Rates: \$ _____ (Other services, indicate type here: _____)

The Foundation/Bureau reserves the right to negotiate rates prior to an awarded contract. If the Foundation/Bureau and Contractor cannot agree upon an hourly rate, the Foundation/Bureau may determine not to issue a contract to the Contractor or may impose additional restrictions relative to services identified in the Contract statement of work.

I, (AUTHORIZED AGENT OF APPLICANT), representing (hereafter the “Applicant”), hereby declare and say:

I am an authorized agent of the Applicant, and I have full authority from the Applicant to submit this declaration and accept the responsibilities stated herein.

I acknowledge the Applicant’s payment of taxes, and to the best of my knowledge, the Applicant is not in violation of any Michigan tax laws, without limitation.

I acknowledge the Applicant’s payment of taxes, and to the best of my knowledge, the Applicant is not in violation of any United States tax laws, without limitation.

The Applicant shall provide written notice to the Foundation/Bureau within two business days of any change to the Applicant’s status of tax law compliance.

I declare under penalty of perjury that the foregoing is true and correct.

Authorized Agent’s Signature: _____ Date: _____

FORM D
ANTI-DISCRIMINATION CERTIFICATION

By my signature, I certify that I am authorized to act on behalf of the Applicant in this matter and that the Applicant has not discriminated and will not discriminate against a subcontractor in awarding a subcontract because the subcontractor is a disadvantaged business enterprise, a minority-owned business, a woman-owned business, a disabled-person owned (including a service-disabled veteran-owned) business, an emerging small business, tribally owned enterprises or any marginalized population owned business.

I declare under penalty of perjury that the foregoing is true and correct.

Authorized Agent's Signature: _____ Date: _____

FORM E
CERTIFICATION OF DISADVANTAGED BUSINESS

Applicant certifies that it [*check one*] is: ____ is not: ____ certified a disadvantaged business enterprise, a minority-owned business, a woman-owned business, a disabled-person owned (including a service-disabled veteran owned) business, an emerging small business, tribally owned enterprises or other (please describe)

If the Applicant has been certified as a disadvantaged business enterprise, a minority-owned business, a woman-owned business, a disabled-person-owned (including a service-disabled veteran-owned) business, an emerging small business, or other, please *include a copy of the certification with the application.*

I further certify that the Applicant is certified as [*check all that apply*]:

A disadvantaged business enterprise: _____ A minority-owned business: _____ A woman-owned business: _____ A disabled-person owned (including service-disabled veteran owned) business: _____ An emerging small business: _____ A tribal owned enterprise/business: _____ Other: _____

If the Foundation/Bureau awards this contract to the Applicant, the Applicant certifies that it will provide the name (s) of any subcontractor that the Applicant intends to utilize in the performance of this contract that is certified as a disadvantaged business enterprise, a minority-owned business, a woman-owned business, a disabled-person owned (including a service-disabled veteran-owned) business, an emerging small business or other.

20
FORM F
REFERENCES

Please include at least three (3) references from current or former clients for similar projects performed in order of most recent experience. References must verify the quality of previous, related work. Destination Marketing and Management organizations (Convention & Visitors Bureau) are preferred.

The Foundation/Bureau may check to determine if the references provided support for the Applicant's ability to comply with the requirements of this RFP. The Foundation/Bureau may use references to obtain additional information or verify any information needed. The Foundation/Bureau may contact any reference (submitted or not) to verify the Applicant's qualifications.

Reference 1

Reference Entity Name: _____

Reference Contact Name: _____

Relationship to Applicant: _____

Reference Telephone Number: _____

Reference Email Address: _____

Services Provided: _____

Date Services Provided: _____ To: _____

Reference 2

Reference Entity Name: _____

Reference Contact Name: _____

Relationship to Applicant: _____

Reference Telephone Number: _____

Reference Email Address: _____

Services Provided: _____

21

Date Services Provided: _____ To: _____

Reference 3

Reference Entity Name: _____

Reference Contact Name: _____

Relationship to Applicant: _____

Reference Telephone Number: _____

Reference Email Address: _____

Services Provided: _____

Date Services Provided: _____ To: _____

EXHIBIT A
STANDARD INSURANCE REQUIREMENTS

Contractor shall obtain, at the Contractor's expense, the insurance specified in the Contract before performing services under the contract and shall maintain it in full force and at its own expense throughout the duration of the Contract, as required by any extended reporting period or tail coverage requirement, and all warranty periods that apply. The Contractor shall obtain the following insurance from insurance companies or entities authorized to transact the insurance and issue coverage in the State of Michigan, which is acceptable to the Foundation/Bureau. Coverage shall be primary and noncontributory with any other insurance and self-insurance, except for Professional Liability and Workers' Compensation. The Contractor shall pay for all deductibles, self-insured retention, and self-insurance if any. The Foundation/Bureau reserves the right to negotiate insurance limits before the award based on the level of risk of the contract.

WORKERS COMPENSATION:

The Contractor shall provide workers' compensation insurance coverage for their employees as required by the applicable workers' compensation laws, including employers' liability insurance coverage with limits not less than \$500,000.00, and shall require and ensure that each of its subcontractors complies with these requirements.

PROFESSIONAL LIABILITY

Professional Liability insurance covering any damages caused by any error, omission, or any negligent acts related to the services to be provided under this Contract by the Contractor and Contractor's subcontractors, agents, officers, or employees in an amount of not less than

\$1,000,000.00 per occurrence is required. The annual aggregate limit shall not be less than \$2,000,000.00. If the coverage is on a claim-made basis, then either an extended reporting period of not less than 24-months shall be included in the Professional Liability insurance coverage. The Contractor shall provide additional coverage as stated below.

COMMERCIAL GENERAL LIABILITY

Commercial General Liability Insurance covering bodily injury and property damage in a form and with satisfactory coverage to the Foundation/Bureau are required. This insurance shall include personal and advertising injury liability, products and completed operations, and contractual liability coverage for the indemnity provided in this contract. Coverage shall be written on an occurrence basis for not less than \$1,000,000.00 per occurrence. The annual aggregate limit shall not be less than \$2,000,000.00.

AUTOMOBILE LIABILITY

Automobile Liability Insurance covering the Contractor's business use, including coverage for all owned, non-owned, or hired vehicles with a combined single limit of not less than

23

\$1,000,000.00 for bodily injury and property damage, is required. This coverage may be written in combination with the Commercial General Liability Insurance (with separate limits for Commercial General Liability and Automobile Liability). Use of personal automobile liability insurance coverage may be acceptable if evidence that the policy includes a business use endorsement is provided.

CERTIFICATE (S) AND PROOF OF INSURANCE

The Contractor shall provide the Foundation/Bureau Certificate (s) of Insurance for all required insurance before delivering any Goods and performing any Service required under this Contract. The Certificate (s) shall list the Foundation/Bureau, its officers, employees, and agents as a Certificate holder and an endorsed Additional Insured. If excess/umbrella insurance is used to meet the minimum insurance requirement, the Certificate of Insurance must include a list of all policies that fall under the excess/umbrella insurance. As proof of insurance, the Foundation/Bureau has the right to request copies of insurance policies and endorsements relating to the insurance requirements.

NOTICE OF CHANGE OR CANCELLATION:

The Contractor or its insurer must provide at least 30 days' written notice to the Foundation/Bureau before canceling a material change to, potential exhaustion of aggregate limits of, or non-renewal of the required insurance coverage (s).

INSURANCE REQUIREMENT REVIEW:

The Contractor agrees to periodic review of insurance requirements by the Foundation/Bureau under this agreement and provides updated requirements as mutually agreed upon by the

Contractor and the Foundation/Bureau.

The FOUNDATION/BUREAU ACCEPTANCE

All insurance providers are subject to the Foundation/Bureau's acceptance. If requested by the Foundation/Bureau, the Contractor shall provide complete copies of insurance policies, endorsements, self-insurance documents, and related insurance documents to the Foundation/Bureau President & CEO to verify the insurance coverages.

24
EXHIBIT B
CHECKLIST
(FOR CONTRACTOR'S OPTIONAL USE)

All forms listed below are required to be submitted for consideration of an application.

- _____ FORM A: Application Cover Sheet
- _____ FORM B: Services Rates
- _____ FORM C: Declaration of Compliance with Tax Laws
- _____ FORM D: Anti-discrimination Certification
- _____ FORM E: Certification of Disadvantaged Business
- _____ FORM F: References
- _____ PROOF OF INSURANCE

CHECKLIST DISCLAIMER

This checklist is provided only as a courtesy to the prospective Applicant. The Foundation/Bureau makes no representation as to the completeness or accuracy of any Checklist. The prospective Applicant is solely responsible for reviewing and understanding the RFP and complying with the requirements of this RFP, whether listed in a checklist or not. Neither the Foundation nor Bureau is liable for any claims or subject to any defenses asserted by the

Applicant based upon, resulting from, or related to the Applicant's failure to comprehend all requirements of this RFP.

NOTE: INCOMPLETE APPLICATIONS

The Applicant is responsible for all information contained in the application you submit. Please read all information and instructions carefully before submitting your application. Incomplete applications will be delayed and may be disqualified, and will not be returned as incomplete.