



Advertise Date: Friday, June 16, 2017

Lee County Board of County Commissioners
DIVISION OF PROCUREMENT MANAGEMENT

Request for Proposal (RFP) NON-CCNA

Solicitation No.: RFP170282LAC

Solicitation Name: Lee County Visitor & Convention Bureau United Kingdom, Ireland, and Scandinavia Representation

Open Date/Time: 7/19/2017 Time: 2:30 PM

Location: Lee County Procurement Management
1500 Monroe Street 4th Floor
Fort Myers, FL 33901

Procurement Contact: Lindsay Cepero Title Procurement Analyst

Phone: (239) 533-8881 Email: LCepero@leegov.com

Requesting Dept. VCB

Pre-Solicitation Meeting:
Type: No meeting scheduled at this time
Date/Time: N/A
Location: N/A

All solicitation documents are available for download at
www.leegov.com/procurement

Notice to Contractor / Vendor / Proposer(s)

RFP#170282LAC, Lee County Visitor & Convention Bureau United Kingdom, Ireland, and Scandinavia Representation

REQUEST FOR PROPOSAL (RFP)

Lee County, Fort Myers, Florida, is requesting proposals from qualified individuals/firms for

RFP170282LAC, Lee County Visitor & Convention Bureau United Kingdom, Ireland, and Scandinavia Representation

Then and there to be publicly opened and read aloud for the purpose of selecting a vendor to furnish; all necessary labor, services, materials, equipment, tools, consumables, transportation, skills and incidentals required for Lee County, Fort Myers, Florida, in conformance with proposal documents, which include technical specifications and/or a scope of work.

Those individuals/firms interested in being considered for (RFP) are instructed to submit, in accordance with specifications, their proposals, pertinent to this project prior to

2:30 PM Wednesday, July 19, 2017

to the office of the **Procurement Management Director, 1500 Monroe Street, 4th Floor, Fort Myers, Florida 33901**. The Request for Proposal shall be received in a sealed envelope, prior to the time scheduled to receive proposals, and shall be clearly marked with the solicitation name, solicitation number, proposer name, and contact information as identified in these solicitation documents.

The Scope of Services for this RFP is available from www.leegov.com/procurement. Vendors who obtain scope of services from sources other than www.Leegov.com/procurement are cautioned that the solicitation package may be incomplete. The County's official bidders list, addendum(s) and information must be obtained from www.Leegov.com/procurement. It is the proposer's responsibility to check for posted information. The County may not accept incomplete proposals.

There will be no Pre-proposal Conference for this RFP

It has been determined that the specifications and scope of work within this solicitation are adequate to describe the product or services being requested. A pre-proposal conference and site visit has not been scheduled for this solicitation. Questions regarding this Request for Proposal are to be directed, in writing, to the individual listed below using the email address listed below or faxed to (239) 485 8383 during normal working hours.

Lindsay Cepero LCepero@LeeGov.com

Sincerely,



Mary G. Tucker, CPPO, FCCM, FCCN
Procurement Management Director

*WWW.LeeGov.Com/Procurement is the County's official posting site

Terms and Conditions Request for Proposal

1. DEFINITIONS

- 1.1. **Addendum/Addenda:** A written change, addition, alteration, correction or revision to a bid, proposal or contract agreement. Addendum/Addenda may be issued following a pre-bid/pre-proposal conference or as a result of a specification or work scope change to the solicitation.
- 1.2. **Approved Alternate:** Solicitation documents may make reference of specific manufacturer(s) or product(s). These references serve only as a recommendation and a guide to minimum quality and performance. The references are not intended to exclude approved alternatives of other manufacturer(s) or product(s).
- 1.3. **Bid/Proposal Package:** A bid/proposal is a document submitted by a vendor in response to some type of solicitation to be used as a basis for negotiations or for entering into a contract.
- 1.4. **Bidder/Responder/Proposer:** One who submits a response to a solicitation.
- 1.5. **County:** Refers to Lee County Board of County Commissioners.
- 1.6. **Due Date and Time/Opening:** Is defined as the date and time upon which a bid or proposal shall be submitted to the Lee County Procurement Management Division. Only bids or proposals received prior to the established date and time will be considered.
- 1.7. **Liquidated Damages:** Damages paid usually in the form of monetary payment, agreed by the parties to a contract which are due and payable as damages by the party who breaches all or part of the contract. May be applied on a daily basis for as long as the breach is in effect.
- 1.8. **Procurement Management:** shall mean the Director of Lee County's Procurement Management Department or designee.
- 1.9. **Responsible:** A vendor, business entity or individual who is fully capable to meet all of the requirements of the bid/proposal solicitation documents and subsequent contract. Must possess the full capability including financial and technical, to perform as contractually required. Must be able to fully document the ability to provide good faith performance.
- 1.10. **Responsive:** A vendor, business entity or individual who has submitted a bid or request for proposal that fully conforms in all material respects to the bid/proposal solicitation documents and all of its requirements, including all form and substance.
- 1.11. **Solicitation:** An invitation to bid, a request for proposal, invitation to negotiate or any document used to obtain bids or proposals for the purpose of entering into a contract.

2. ORDER OF PRECEDENCE

- 2.1. If a conflict exists between the "Terms and Conditions" the following order of precedents will apply:
 - 2.1.1. Florida State Law as applied to Municipal Purchasing in accordance with Title XIX, "Public Business", Chapter 287 "Procurement of Personal Property and Services."
 - 2.1.2. Lee County Procurement Management Division Policy and Ordinances
 - 2.1.3. Special Conditions and Supplemental Instructions
 - 2.1.4. Detailed Scope of Work
 - 2.1.5. These Terms and Conditions

3. RULES, REGULATIONS, LAWS, ORDINANCES AND LICENSES

- 3.1. It shall be the responsibility of the proposer to assure compliance with all other federal, state, or county codes, rules, regulations or other requirements, as each may apply. Any involvement with the Lee County shall be in accordance with but not limited to:
 - 3.1.1. Lee County Procurement Policy Manual
 - 3.1.2. Pursuant to FL § Section 119.071, Public Records, General exemptions from inspection or copying of public records, sealed bids or proposals received by the County. Pursuant to this, solicitation are exempt from public records request (s. 119.07(1) and s. 24(a), Art. I, of the Florida Constitution) until such time as the agency provides notice of a decision or intended decision (pursuant to s. 119.071(2)) or within 30 days after bid or proposal opening, whichever is earlier.
 - 3.1.3. Florida Statute 218 Public Bid Disclosure Act.

- 3.1.4. Florida Statute 337.168 Confidentiality of official estimates, identities of potential bidders, and bid analysis and monitoring.
- 3.1.5. FL § Section 607.1501(1) states: A foreign corporation may not transact business in the State of Florida until it obtains a certificate of authority from the Department of State.
- 3.2. **Local Business Tax:** If applicable, provide with proposal.
- 3.3. **License(s):** Proposer should provide, at the time of the opening of the proposal, all necessary permits and/or licenses required for this product and/or service.
4. RFP – PREPARATION OF PROPOSAL
 - 4.1. Proposals must be sealed in an envelope, and the outside of the envelope must be affixed with the label included in the forms section.
 - 4.2. **Submission Format:**
 - 4.2.1. Required Forms: complete and return **all** required forms. If the form is not applicable please return with “Not Applicable” or “N/A” in large letters across the form.
 - 4.2.2. Execution of Proposal: All documents must be properly signed by corporate authorized representative, witnessed, and where applicable corporate and/or notary seals affixed. All proposals shall be typed or printed in ink. The proposer may not use erasable ink. All corrections made to the proposal shall be initialed.
 - 4.2.3. If a cost/bid schedule was provided in Microsoft Excel format, the returned completed schedule should be included as a Microsoft Excel File on the CD or Flash drive.
 - 4.2.4. Should not contain links to other Web pages.
 - 4.3. **Preparation Cost:**
 - 4.3.1. The Proposer is solely responsible for any and all costs associated with responding to this solicitation. No reimbursement will be made for any costs associated with the preparation and submittal of any proposal, or for any travel and per diem costs that are incurred by any Proposer.
5. RESPONSES RECEIVED LATE
 - 5.1. It shall be the proposer’s sole responsibility to deliver the proposal submission to the Lee County Procurement Management Division prior to or on the time and date stated.
 - 5.2. Any proposals received after the stated time and date will not be considered. The proposal shall not be opened at the public opening. Arrangements may be made for the unopened proposal to be returned at the proposer’s request and expense.
 - 5.3. The Lee County Procurement Management Division shall not be responsible for delays caused by the method of delivery such as, but not limited to; Internet, United States Postal Service, overnight express mail service(s), or delays caused by any other occurrence.
6. PROPOSER REQUIREMENTS (unless otherwise noted)
 - 6.1. **Responsive and Responsible:** Only proposals received from responsive and responsible proposers will be considered. The County reserves the right before recommending any award to inspect the facilities and organization; or to take any other necessary action, such as background checks, to determine ability to perform is satisfactory, and reserves the right to reject submission packages where evidence submitted or investigation and evaluation indicates an inability for the proposer to perform.
 - 6.1.1. Additional sources may be utilized to determine credit worthiness and ability to perform.
 - 6.1.2. Any proposer or sub-proposer that will have access to County facilities or property may be required to be screened to a level that may include, but is not limited to; fingerprints, statewide criminal background check. There may be fees associated with these procedures. These costs are the responsibility of the proposer or sub-proposer.
 - 6.2. **Past Performance:** All vendors will be evaluated on their past performance and prior dealings with Lee County (i.e., failure to meet specifications, poor workmanship, late delivery, etc.) Poor or unacceptable past performance may result in proposer disqualification.
7. PRE-SOLICITATION CONFERENCE
 - 7.1. A pre-solicitation conference will be held in the location, date, and time specified on the cover of this solicitation. The cover will also note if the pre-solicitation conference is Non-Mandatory or Mandatory. All questions and answers are considered informal. All prospective proposers are encouraged to obtain

and review the solicitation documents prior to the pre-proposal so they may be prepared to discuss any questions or concerns they have concerning this project. All questions must be submitted formally in writing to the procurement staff noted on the first page of the solicitation document. A formal response will be provided in the form of an addendum (see "County Interpretation/Addendums" for additional information.) A site visit may follow the pre-proposal conference, if applicable.

- 7.2. **Non-Mandatory:** Pre-solicitation conferences are generally non-mandatory, but it is highly recommended that prospective proposers participate.
- 7.3. **Mandatory:** Failure to attend a mandatory pre-solicitation conference will result in the proposal being considered **non-responsive**.

8. COUNTY INTERPRETATION/ADDENDUMS

- 8.1. Each proposer shall examine the solicitation documents and shall judge all matters relating to the adequacy and accuracy of such documents. Any inquiries, suggestions or requests concerning interpretation, clarification or additional information pertaining to the solicitation shall be made **in writing, submitted at least eight (8) calendar days prior to the date when the proposal is due**.
- 8.2. Response(s) will be in the form of an Addendum posted on www.leegov.com/procurement. It is solely the proposer's responsibility to check the website for information. No notifications will be sent by Lee County Procurement Management Division.
- 8.3. All Addenda shall become part of the Contract Documents.
- 8.4. The County shall not be responsible for oral interpretations given by any County employee, representative, or others. Interpretation of the meaning of the plans, specifications or any other contract document, or for correction of any apparent ambiguity, inconsistency or error there in, shall be in writing. Issuance of a written addendum by the County's Procurement Management Division is the only official method whereby interpretation, clarification or additional information can be given.

9. QUALITY GUARANTEE/WARRANTY (as applicable)

- 9.1. Proposer will guarantee their work without disclaimers, unless otherwise specifically approved by the County, for a minimum of twelve (12) months from final completion.
- 9.2. Unless otherwise specifically provided in the specifications, all equipment and materials and articles incorporated in the work covered by this contract shall be new, unused and of the most suitable grade for the purpose intended. Refurbished parts or equipment are not acceptable unless otherwise specified in the specifications. All warranties will begin from the date of final completion.
- 9.3. Unless otherwise specifically provided in the specifications, the equipment must be warranted for twelve (12) months, shipping, parts and labor. Should the equipment be taken out of service for more than forty-eight (48) hours to have warranty work performed, a loaner machine of equal capability or better shall be provided for use until the repaired equipment is returned to service at no additional charge to the County.
- 9.4. If any product does not meet performance representation or other quality assurance representations as published by manufacturers, producers or distributors of such products or the specifications listed, the vendor shall pick up the product from the County at no expense to the County. The County reserves the right to reject any or all materials, if in its judgment the item reflects unsatisfactory workmanship or manufacturing or shipping damage. The vendor shall refund, to the County, any money which has been paid for same.

10. SUBSTITUTION(S)/APPROVED ALTERNATE(S)

- 10.1. Unless otherwise specifically provided in the specifications, reference to any equipment, material, article or patented process, by trade name, brand name, make or catalog number, shall be regarded as establishing a standard of quality and shall not be construed as limiting competition. If a proposer wishes to make a substitution in the specifications, the bidder shall furnish to the County, **no later than ten (10) business days prior to the solicitation opening date**, the name of the manufacturer, the model number, and other identifying data and information necessary to aid the County in evaluating the substitution. Such information is submitted through the Procurement Management Division. Any such substitution shall be subject to County approval through the issuance of a written addendum by the County's Procurement Management Division. Substitutions shall be approved only if determined by the County to be an **Approved Alternate** to the prescribed specifications.

- 10.2. A proposal containing a substitution is subject to disqualification if the substitution is not approved by the County. Items bid must be identified by brand name, number, manufacturer and model, and shall include full descriptive information, brochures, and appropriate attachments. Brand names are used for descriptive purposes only. An **Approved Alternate** product or service may be used.

11. ADDITIONS, REVISIONS AND DELETIONS

- 11.1. Additions, revisions, or deletions to the Terms and Conditions, specifications that change the intent of the solicitation will cause the solicitation to be non-responsive and the proposal will not be considered. The Procurement Management Director shall be the sole judge as to whether or not any addition, revision, or deletion changes the intent of the solicitation.

12. NEGOTIATED ITEMS

- 12.1. Any item not outlined in the Scope of Services may be subject to negotiations between the County and the successful Proposer.
- 12.2. After award of this proposal the County reserves the right to add or delete items/services at prices to be negotiated at the time of addition or deletion.
- 12.3. At contract renewal time(s) or in the event of significant industry wide market changes, the County may negotiate justified adjustments such as price, terms, etc., to this contract with the County, in its sole judgment, considers such adjustments to be in the best interest of the County.

13. ERRORS, OMISSIONS, CALCULATION ERRORS (as applicable)

- 13.1. **Errors/Omissions:** Approval by County of the successful proposer's work product for the project shall not constitute nor be deemed a release of the responsibility and liability of the successful proposer for the accuracy and competency of the successful proposer's designs, drawings, specifications or other documents and work pertaining to the project. Additionally, approval by the County of the successful proposer's work product shall not be deemed to be an assumption of drawings, specifications or other documents prepared by the successful proposer for the project. After acceptance of the final plans by the County, the successful proposer agrees, prior to and during the construction of the project, to perform such successful proposer services, at no additional cost to the County, as may be required by the County to correct errors or omissions on the plans prepared by the successful proposer pertaining to the project.
- 13.2. **Calculation Errors:** In the event of multiplication/addition error(s), the unit price shall prevail. Written prices shall prevail over figures where applicable. All proposals shall be reviewed mathematically and corrected, if necessary, using these standards, prior to additional evaluation.

14. CONFIDENTIALITY

- 14.1. Proposers should be aware that all proposals provided are subject to public disclosure and will **not** be afforded confidentiality, unless provided by Chapter 119 Florida Statute.
- 14.2. If information is submitted with a proposal that is deemed "Confidential" the proposer must stamp those pages of the proposal that are considered confidential. The proposer must provide documentation as to validate why these documents should be declared confidential in accordance with Chapter 119, "Public Records," exemptions.
- 14.3. Lee County **will not reveal engineering estimates or budget amounts for a project** unless required by grant funding or unless it is in the best interest of the County. According to Florida State Statute 337.168: A document or electronic file revealing the official cost estimate of the department of a project is confidential and exempt from the provisions of s. 119.07(1) until the contract for the project has been executed or until the project is no longer under active consideration.

15. CONFLICT OF INTEREST

- 15.1. All proposers are hereby placed on formal notice that per Section 3 of Lee County Ordinance No. 92-22: The County is prohibited from solicitation of a professional services firm to perform project design and/or construction services if the firm has or had been retained to perform the project feasibility or study analysis.

And:

- 15.2. A professional services firm who has performed or participated in the project feasibility planning, study analysis, development of a program for future implementation or drafting of solicitation documents directly related to this County project, as the primary vendor/consulting team, cannot be selected or retained, as the primary consultant/vendor or named a member of the consulting/contracting team, to perform project design, engineering or construction services for subsequent phase(s) or scope of work for this project. Pursuant to FS. S287.057 (17) the firm will be deemed to have a prohibited conflict of interest that creates an unfair competitive advantage.
 - 15.3. Should your proposal be found in violation of the above stated provisions; the County will consider this previous involvement in the project to be a conflict of interest, which will be cause for immediate disqualification of the proposal from consideration for this project.
 - 15.4. **Business Relationship Disclosure Requirement:** The award hereunder is subject to the provisions of Chapter 112, Public Officers and Employees: General Provisions, Florida Statutes. All proposers must disclose with their proposal the name of any officer, director or agent who is also an employee of the Lee County or any of its agencies. Further, all proposers must disclose the name of any County employee who owns directly or indirectly, an interest of five percent (5%) or more in the proposer's firm or any of its branches.
16. ANTI-LOBBYING CLAUSE (Cone of Silence)
- 16.1. Following Florida Statute Section 287.057(23), Upon the issuance of the solicitation, prospective proposers or any agent, representative or person acting at the request of such proposer shall not have any contact, communicate with or discuss any matter relating in any way to the solicitation with any Commissioner, Evaluation Review Committee, agent or employee of the County other than the Procurement Management Director or their designee. This prohibition begins with the issuance of any solicitation, and ends upon execution of the final contract or when the solicitation has been cancelled. **If it is determined that improper communications were conducted, the Proposer maybe declared non-responsible.**
17. DRUG FREE WORKPLACE
- 17.1. Lee County Board of County Commissioners encourages Drug Free Workplace programs as defined in accordance with Section 287.087, FL § .
18. DISADVANTAGED BUSINESS ENTERPRISE (DBE's)
- 18.1. The County encourages the use of Disadvantaged Business Enterprise Proposer(s) as defined and certified by the State of Florida Department of Transportation.
 - 18.2. Bidder/Proposer is required to indicate whether the Firm and/or any proposed sub-consultants are Disadvantaged Business Enterprises (DBE). Lee County encourages the utilization and participation of DBEs in procurements, and evaluation proceedings will be conducted within the established guidelines regarding equal employment opportunity and nondiscriminatory action based upon the grounds of race, color, sex or national origin. Interested certified Disadvantaged Business Enterprise (DBE) firms as well as other minority-owned and women-owned firms are encouraged to respond.
19. ANTI-DISCRIMINATION/EQUAL EMPLOYMENT OPPORTUNITY
- 19.1. The proposer agrees to comply, in accordance with Florida Statute 287.134, 504 of the Rehabilitation Act of 1973 as amended, the Americans with Disabilities Act of 1990 (ADA), the ADA Amendments Act of 2008 (ADAAA) that furnishing goods or services to the County hereunder, no person on the grounds of race, religion, color, age, sex, national origin, disability or marital status shall be excluded from participation in, denied the benefits of, or otherwise be subjected to discrimination.
 - 19.2. The proposer will not discriminate against any employee or applicant for employment because of race, religion, color, age, sex, national origin, disability or marital status. The proposer will make affirmative efforts to ensure that applicants are employed and that employees are treated during employment without regard to their race, religion, color, age, sex, national origin, disability or marital status.
 - 19.3. The proposer will include the provisions of this section in every sub-contract under this contract to ensure its provisions will be binding upon each sub-contractor. The proposer will take such actions in respect to any sub-contractor, as the contracting agency may direct, as a means of enforcing such provisions, including sanctions for non-compliance.

- 19.4. An entity or affiliate who has been placed on the State of Florida's Discriminatory Vendor List (This list may be viewed by going to the Department of Management Services website at <http://www.dms.myflorida.com>) may not submit a bid on a contract to provide goods or services to a public entity, may not submit a bid on a contract with a public entity for the construction or repair of a public building or public work, may not submit bids on leases of real property to a public entity, may not award or perform work as a vendor, supplier, sub-contractor, or consultant under contract with any public entity, and may not transact business with any public entity.

20. PROPOSER/SUB-PROPOSER/CONSULTANT/CONTRACTOR RELATIONSHIP

- 20.1. The prime proposer on a solicitation may not also be listed as a sub-proposer/consultant/contractor to another firm submitting a proposal for the same solicitation. Should this occur, all responses from the involved/named firms will be considered non-compliant and rejected for award. Sub-proposers/consultant/contractor may be listed on multiple proposals for the same solicitation.

21. SUB-PROPOSER/CONSULTANT

- 21.1. The use of sub-proposer/consultant under this solicitation is not allowed without prior written authorization from the County representative.

22. RFP - PROJECT GUIDELINES

- 22.1. The County has established the following Guidelines, Criteria, Goals, Objectives, Constraints, Schedule, Budget and or Requirements which shall service as a guide to the proposer(s) in conforming the professional services and work to provide pursuant to this Agreement/Contract:
 - 22.1.1. No amount of work is guaranteed upon the execution of an agreement/contract.
 - 22.1.2. Hourly rates and all other negotiated expenses will remain in effect throughout the duration of the agreement/contract period.
 - 22.1.3. This contract does not entitle any firm to exclusive rights to County agreements/contracts. The County reserves the right to perform any and all available required work in-house or by any other means it so desires.
 - 22.1.4. In reference to vehicle travel, mileage and man-hours spent in travel time, is considered incidental to the work and not an extra compensable expense.
 - 22.1.5. Lee County reserves the right to add or delete, at any time, and or all tasks or services associated with this agreement.
 - 22.1.6. Any Single Large Project: The County, in its sole discretion, reserves the right to separately solicit any project that is outside the scope of this solicitation, whether through size, complexity or the dollar value.

23. RFP – EVALUATION

- 23.1. **Ranking Method:** Lee County uses the Dense Ranking (1223” ranking). In Dense Ranking, items that compare equal, receive the same ranking number, and the next item(s) receive the immediately following ranking number. Equivalently, each item’s ranking number is 1 plus the number of items ranked above it that are distinct with respect to the ranking order. This ranking method is used for each individual committee member’s scores. Thus if A ranks ahead of B and C (which compare equal) which are both ranked ahead of D, then A is ranked number 1 (“first”), B is ranked number 2 (“joint second”), C is also ranked number 2 (“joint second”) and D is ranked number 3 (“third”).
- 23.2. **Evaluation Meeting(s):**
 - 23.2.1. The first evaluation will rank Proposers based on the scores from the selection criteria point values.
 - 23.2.2. Following the initial evaluation process, the short-listed proposer(s) will be required to provide an on-site interview/presentation.
 - 23.2.3. Such subsequent evaluations will be accomplished by simply ranking the proposers. Proposers will be ranked in sequential order with one (1) being the highest ranking. Proposers’ rankings will then be totaled with the total lowest scores receiving final rank order starting with one (1) - the highest ranking.
 - 23.2.4. Proposed short-list and final selection meeting dates are posted on the Procurement Management web page: www.leegov.com/procurement (Projects, Award Pending.)

24. RFP – TIEBREAKER

- 24.1. In the event of a tie, two or more proposers that have the same ranking, the following steps will be taken to determine the highest ranked proposer. This method shall be used for all (RFP) ties.
 - 24.1.1. Step 1: The proposer that has the highest number of 1st place rankings shall be deemed the first ranked proposer. In the event a tie still exists the proposer with the highest number of 2nd, place rankings shall be the first ranked proposer. Should a tie still remain the method used above will continue with each ranking level, 3rd, then 4th, then 5th rank, will be counted until the tie is broken.
 - 24.1.2. Step 2: At the conclusion of step 1 if all is equal, the local proposer shall be deemed the highest ranked proposer over a non-local proposer. Local shall be defined by Lee County Ordinance 08-26 or current revision thereof.
 - 24.1.3. Step 3: At the conclusion of step 1 and step 2 if all is equal, the proposer having a drug-free work place program, in accordance with Section 287.087, FL § , shall be deemed the first ranked proposer.
 - 24.1.4. Step 4: At the conclusion of steps 1, 2, 3, if all are equal, the 1st place proposer shall be determined by the flip of a coin.
- 24.2. When the tiebreaker is determined the highest ranked proposer shall be awarded the contract or receive the first opportunity to negotiate, as applicable.
- 24.3. If an award or negotiation is unsuccessful with the highest ranked proposer, award or negotiations may commence with the next highest ranked proposer.

25. RFP – SELECTION PROCEDURE

- 25.1. The selection will be made in accordance with Lee County Procurement Policy. Some of all of the responding proposer(s) may be requested to provide interviews and/or presentations of their proposal, for the ranking process.
- 25.2. The recommendation to award, negotiated rates and agreement/contract(s) will be submitted to the Board of County Commissioners for approval.
- 25.3. If a satisfactory agreement/contract(s) cannot be negotiated, in a reasonable amount of time, the County, in its sole discretion, may terminate negotiations with the selected proposer(s) and begin agreement/contract negotiations with the next finalist.
- 25.4. The Procurement Management Director reserves the right to exercise their discretion to:
 - 25.4.1. Make award(s) to one or multiple proposers.
 - 25.4.2. Waive minor informalities in any response;
 - 25.4.3. Reject any and all proposals with or without cause;
 - 25.4.4. Accept the response that in its judgment will be in the best interest of Lee County

26. RFP – EVALUATION/ SELECTION COMMITTEE

- 26.1. The selection of Proposer(s) shall be by a Selection Committee consisting of five (5) staff representatives, as a minimum, from the appropriate County Departments as approved by the Procurement Management Director or designee.
- 26.2. The Selection Committee will receive and review written proposals in response to this Request for Proposal (RFP). Responses will be evaluated against a set of criteria to determine those Proposers/Firms most qualified and suited for this project. If applicable, the Selection Committee may chose to short-list Proposers/Firms to be interviewed to determine final selection.

27. WITHDRAWAL OF PROPOSAL

- 27.1. No proposal may be withdrawn for a period of **180 calendar days** after the scheduled time for receiving proposals. A proposal may be withdrawn prior to the proposal opening date and time. Withdrawal requests must be made in writing to the Procurement Management Director, who will approve or disapprove the request.
- 27.2. A proposer may withdraw a proposal any time prior to the opening of the solicitation.
- 27.3. After proposals are opened, but prior to award of the contract by the County Commission, the Procurement Management Director may allow the withdrawal of a proposal because of the mistake of the proposer in the preparation of the proposal document. In such circumstance, the decision of the Procurement

Management Director to allow the proposal withdrawal, although discretionary, shall be based upon a finding that the proposer, by clear and convincing evidence, has met each of the following four tests:

- 27.3.1. The proposer acted in good faith in submitting the proposal,
- 27.3.2. The mistake in proposal preparation that was of such magnitude that to enforce compliance by the proposer would cause a severe hardship on the proposer,
- 27.3.3. The mistake was not the result of gross negligence or willful inattention by the proposer; and
- 27.3.4. The mistake was discovered and was communicated to the County prior to the County Commission having formally awarded the contract/agreement.

28. PROTEST RIGHTS

- 28.1. Any proposer that has submitted a formal response to Lee County, and who is adversely affected by an intended decision with respect to the award, has the right to protest an intended decision posted by the County as part of the solicitation process.
- 28.2. "Decisions" are posted on the Lee County Procurement Management Division website. Proposers are solely responsible to check for information regarding the solicitation. (www.leegov.com/procurement)
- 28.3. Refer to the "Bid/Proposal Protest Procedure" section of the Lee County "Contracts Manual" for the complete protest process and requirements. The Manual is posted on the Lee County website or you may contact the Procurement Management Director.
- 28.4. In order to preserve your right to protest, you must file a written "**Notice Of Intent To File A Protest**" with the Lee County Procurement Management Director by 4:00 PM on the 3rd working day after the decision affecting your rights is posted on the Lee County website.
 - 28.4.1. The notice must clearly state the basis and reasons for the protest.
 - 28.4.2. The notice must be physically received by the Procurement Management Director within the required time frame. No additional time is granted for mailing.
- 28.5. To secure your right to protest you will also be required to post a "**Protest Bond**" and file a written "**Formal Protest**" document within 10 calendar days after the date of "Notice of Intent to File a Protest" is received by the Procurement Management Director.
- 28.6. **Failure to follow the protest procedures requirement within the timeframes as prescribed herein and established by the Lee County Board of County Commissioners, Florida, shall constitute a waiver of your protest and any resulting claims.**

29. AUTHORITY TO UTILIZE BY OTHER GOVERNMENT ENTITIES

- 29.1. This opportunity is also made available to any government entity. Pursuant to their own governing laws, and subject to the agreement of the vendor, other entities may be permitted to make purchases at the terms and conditions contained herein. Lee County Board of County Commissioners will not be financially responsible for the purchases of other entities from this solicitation.

30. CONTRACT ADMINISTRATION

- 30.1. **Designated Contact:**
 - 30.1.1. The awarded proposer shall appoint a person(s) to act as a primary contact for all County departments. This person or back-up shall be readily available during normal working hours by phone or in person, and shall be knowledgeable of the terms and procedures involved.
 - 30.1.2. Lee County requires that the awarded proposer to provide the name of a contact person(s) and phone number(s) which will afford Lee County access 24 hours per day, 365 days per year, of this service in the event of major breakdowns or natural disasters.
- 30.2. **RFP – Term:** (unless otherwise stated in the Scope of Work or Detailed Specifications)
 - 30.2.1. Unless otherwise stated in the scope of work, specifications, or special conditions the default **contract term shall be one (1) year with three (3), one (1) year renewals for a total of four (4) years upon mutual agreement of both parties.**
 - 30.2.2. The County reserves the right to renew this contract, or any portion thereof, and to negotiate pricing as a condition for each.
 - 30.2.3. The County's performance and obligation to pay under this contract, and any applicable renewal options, is contingent upon annual appropriation of funds.
- 30.3. **RFP – Basis of Award:**

30.3.1. Award will be made to the most responsible and responsive proposer based on the evaluation criteria.

30.4. **Agreements/Contracts:**

30.4.1. The awarded proposer will be required to execute an Agreement/Contract as a condition of award. A sample of this document may be viewed on-line at <http://www.leegov.com/procurement/forms>.

30.5. **Records:**

30.5.1. Retention: The proposer shall maintain such financial records and other records as may be prescribed by Lee County or by applicable federal and state laws, rules and regulations. Unless otherwise stated in the specifications, the proposer shall retain these records for a period of five years after final payment, or until they are audited by Lee County, whichever event occurs first.

30.5.2. Right to Audit/Disclosure: These records shall be made available during the term of the contract as well as the retention period. These records shall be made readily available to County personnel with reasonable notice and other persons in accordance with the Florida General Records Schedule. Awarded Bidder/Proposer(s) are hereby informed of their requirement to comply with FL §119 specifically to:

30.5.2.1. Keep and maintain public records required by the County to perform the service.

30.5.2.2. 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 provided or as otherwise provided by law.

30.5.2.3. Ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law for the duration of the contract term and following completion of the contract if the contractor does not transfer the records to the County.

30.5.2.4. Upon completion of the contract, 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 service. If the contractor transfers all public records to the County upon completion of the contract, 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 the contract, 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 information technology systems of the County.

30.5.3. Public Record: **IF THE VENDOR HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FL § , TO THE VENDOR'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THE CONTRACT, CONTACT THE CUSTODIAN OF PUBLIC RECORDS AT 239-533-2221, 2115 SECOND STREET, FORT MYERS, FL 33901, <http://www.leegov.com/publicrecords>.**

30.5.4. Ownership: It is understood and agreed that all documents, including detailed reports, plans, original tracings, specifications and all data prepared or obtained by the successful proposer in connection with its services hereunder, include all documents bearing the professional seal of the successful proposer, and shall be delivered to and become the property of Lee County, prior to final payment to the successful proposer or the termination of the agreement. This includes any electronic versions, such as CAD or other computer aided drafting programs.

30.6. **Termination:**

30.6.1. Any agreement as a result of this solicitation may be terminated by either party giving **thirty (30) calendar days advance written notice**. The County reserves the right to accept or not accept a termination notice submitted by the proposer, and no such termination notice submitted by the vendor shall become effective unless and until the vendor is notified in writing by the County of its acceptance.

- 30.6.2. The Procurement Management Director may immediately terminate any agreement as a result of this solicitation for emergency purposes, as defined by the Lee County Purchasing and Payment Procedures Manual (Purchasing Manual), (also known as Appendix “D” ”AC-4-1.pdf”.)
- 30.6.3. Any proposer who has voluntarily withdrawn from a solicitation without the County’s mutual consent during the contract period shall be barred from further County procurement for a **period of 180 days**. The vendor may apply to the Board for a waiver of this debarment. Such application for waiver of debarment must be coordinated with and processed by the Procurement Management Department.
- 30.6.4. The County reserves the right to terminate award or contract following any of the below for goods or services over \$1,000,000:
 - 30.6.4.1. Contractor is found to have submitted a false certification as provided under FL § 287.135 (5);
 - 30.6.4.2. Contractor has been placed on the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List;
 - 30.6.4.3. Contractor has engaged in business operations in Cuba or Syria;
 - 30.6.4.4. Contractor has been placed on the Scrutinized Companies that Boycott Israel List, or is engaged in a boycott of Israel – beginning October 1, 2016.

31. WAIVER OF CLAIMS

- 31.1. Once this contract expires, or final payment has been requested and made, the awarded vendor shall have no more than **thirty (30) calendar days** to present or file any claims against the County concerning this contract. After that period, the County will consider the vendor to have waived any right to claims against the County concerning this agreement.

32. LEE COUNTY PAYMENT PROCEDURES

- 32.1. All vendors are requested to mail an original invoice to:
Lee County Finance Department
Post Office Box 2238
Fort Myers, FL 33902-2238
- 32.2. All invoices will be paid as directed by the Lee County payment procedure unless otherwise stated in the detailed specification portion of this project.
- 32.3. Lee County will not be liable for requests for payment deriving from aid, assistance, or help by any individual, vendor, proposer, or bidder for the preparation of these specifications.
- 32.4. Lee County is generally a tax exempt entity subject to the provisions of the 1987 legislation regarding sales tax on services. Lee County will pay those taxes for which it is obligated, or it will provide a Certificate of Exemption furnished by the Department of Revenue. All proposers should include in their proposal, all sales or use taxes, which they will pay when making purchases of material or sub-contractor’s services.

33. MATERIAL SAFETY DATA SHEETS (MSDS)

- 33.1. In accordance with Chapter 443 of the FL § , it is the vendor’s responsibility to provide Lee County with Material Safety Data Sheets on bid materials, as may apply to this procurement.

34. DEBRIS DISPOSAL

- 34.1. Unless otherwise stated, the Proposer shall be fully responsible for the lawful removal and disposal of any materials, debris, garbage, vehicles or other such items which would interfere with the undertaking and completion of the project. There shall not be an increase in time or price associated with such removal.

35. SHIPPING

- 35.1. Cost of all shipping to the site, including any inside delivery charges and all unusual storage requirements shall be borne by the proposer unless otherwise agreed upon in writing prior to service. It shall be the proposers responsibility to make appropriate arrangements, and to coordinate with authorized personnel at the site, for proper acceptance, handling, protection and storage (if available) of equipment and material delivered. All pricing to be F.O. B. destination.

- 35.2. The materials and/or services delivered under the proposal shall remain the property of the seller until a physical inspection and actual usage of these materials and/or services is accepted by the County and is deemed to be in compliance with the terms herein, fully in accord with the specifications and of the highest quality.

36. INSURANCE

- 36.1. Insurance shall be provided by the awarded proposer. Upon request, a certificate of insurance (COI) complying with the attached guide shall be provided by the proposer.

End of Terms and Conditions Section



Major Insurance Requirements

Minimum Insurance Requirements: *Risk Management in no way represents that the insurance required is sufficient or adequate to protect the Vendor's interest or liabilities. The following are the required minimums the Vendor must maintain throughout the duration of this Contract. The County reserves the right to request additional documentation regarding insurance provided.*

- a. **Commercial General Liability** - Coverage shall apply to premises and/or operations, products and completed operations, independent contractors, and contractual liability exposures with minimum limits of:
 - \$1,000,000 per occurrence
 - \$2,000,000 general aggregate
 - \$1,000,000 products and completed operations
 - \$1,000,000 personal and advertising injury

- b. **Business Auto Liability** - The following Automobile Liability will be required and coverage shall apply to all owned, hired and non-owned vehicles use with minimum limits of:
 - \$1,000,000 combined single limit (CSL)
 - \$500,000 bodily injury per person
 - \$1,000,000 bodily injury per accident
 - \$500,000 property damage per accident

- c. **Workers' Compensation** - Statutory benefits as defined by Chapter 440, Florida Statutes, encompassing all operations contemplated by this Contract or Agreement to apply to all owners, officers, and employees regardless of the number of employees. Workers' Compensation exemptions may be accepted with written proof of the State of Florida's approval of such exemption. Employers' liability will have minimum limits of:
 - \$500,000 per accident
 - \$500,000 disease limit
 - \$500,000 disease – policy limit

*The required minimum limit of liability shown in a. and b. may be provided in the form of "Excess Insurance" or "Commercial Umbrella Policies," in which case, a "Following Form Endorsement" will be required on the "Excess Insurance Policy" or "Commercial Umbrella Policy."

Verification of Coverage:

1. Coverage shall be in place prior to the commencement of any work and throughout the duration of the Contract. A certificate of insurance will be provided to the Risk Manager for review and approval. The certificate shall provide for the following:
 - a. The certificate holder shall read as follows:
Lee County Board of County Commissioners
P.O. Box 398
Fort Myers, Florida 33902

 - b. "Lee County, a political subdivision and Charter County of the State of Florida, its agents, employees, and public officials" will be named as an "Additional Insured" on the General Liability policy, including Products and Completed Operations coverage.

Special Requirements:

1. An appropriate "Indemnification" clause shall be made a provision of the Contract.

2. If applicable, it is the responsibility of the general contractor to ensure that all subcontractors comply with all insurance requirements.

End of Insurance Section

**SPECIAL PROVISIONS
FOR
RFP170282LAC, LEE COUNTY VISITOR & CONVENTION BUREAU UNITED KINGDOM, IRELAND,
AND SCANDINAVIA REPRESENTATION**

1. APPLICABILITY OF LOCAL, STATE, AND FEDERAL LAWS, STATUTES, ORDINANCES, ETC...

1.1 Local, State, and Federal laws, statutes, ordinances, policies, and equivalent stated herein or otherwise known shall be applied and enforced to Proposers that fall within such jurisdictions. Such laws, statutes, and equivalent may be waived at the County's discretion for Proposers that do not fall within such jurisdictions (IE: Foreign based Proposers). The County further reserves the right to enforce any applicable laws, statutes, ordinances, or equivalent that apply to Proposer due to jurisdiction of office(s) or jurisdiction of services being rendered or performed.

2. CONFLICT OF INTEREST

2.1 The Firm agrees, during the term of the Agreement, not to divulge, furnish or make available to any third person, firm, or organization, without the County's prior written consent, or unless incident to the proper performance of Provider's obligations hereunder, or as provided for or required by law, or in the course of judicial or legislative proceedings where such information has been properly subpoenaed; any non-public information concerning the services to be rendered by the Firm, and Firm shall require all of its employees and subcontractor(s)/subconsultant(s) to comply with the provisions of this paragraph.

**DETAILED SPECIFICATIONS
FOR
RFP170282LAC, LEE COUNTY VISITOR & CONVENTION BUREAU UNITED KINGDOM, IRELAND,
AND SCANDINAVIA REPRESENTATION**

1. INTRODUCTION & BACKGROUND

1.1 The Lee County Visitor & Convention Bureau (VCB) is the official marketing and promotional agency for visitation to Lee County and its 11 geographic regions. The organization brands and markets Lee County, Florida as *The Beaches of Fort Myers & Sanibel* and is funded by the 5 percent tourist tax on short term accommodations commonly known as the bed tax.

1.2 In Lee County, tourism employs 1 out of every 5 people. We receive approximately 5 million visitors annually that spend \$3 billion while in our area. In 2015, international markets delivered 782,333 visitors to Lee County's lodging establishments – with Germany, Canada, and the United Kingdom contributing the largest shares.

2. GENERAL SCOPE OF PROJECT

2.1 The Lee County Board of County Commissioners and the Visitor & Convention Bureau seek to procure and contract with an established and qualified Firm that shall act as the VCB's in-market specialist for tourism marketing and sales representation in the United Kingdom (UK), Ireland and Scandinavian (Norway, Denmark, Sweden and Finland) markets in order to promote Lee County as a premier travel destination.

2.2 For purposes of this solicitation and subsequent agreement "Target Area" shall refer to the United Kingdom, Ireland, and Scandinavia.

3. PROJECT TERM

3.1 The successful Firm shall be responsible for furnishing and delivering to the Lee County requesting Department(s) the commodity or services on an "as needed basis" for a one-year (1) period beginning no sooner than October 1, 2017. There may be an option to extend this contract as specified in the Scope of Work or specifications upon the approval of both the County and the successful Firm at the time of extension or renewal for two (2), additional one (1) year periods.

4. COPYRIGHTED MATERIAL

4.1 Copyrighted material will be accepted as part of a proposal only if accompanied by a waiver that shall allow the County to make paper and electronic copies necessary for the use of County staff and agents. Copyrighted material is not exempt from the Public Records Law, Chapter 119, Florida Statutes. Therefore such material shall be subject to viewing by the public.

4.2 The representing Firm shall assign to the County all rights throughout the world in perpetuity in the nature of copyright, trademark, patent, right to ideas, in and to all versions of the plans, specifications, drawings, reports, graphics, analysis, plans, strategies, media, print, etc...prepared by the Firm for the County in connection with this agreement.

5. DETAILED SCOPE OF WORK, DELIVERABLES, & PROVISIONS

5.1 The Lee County VCB is seeking a qualified Firm to provide expertise in assisting with the development and implementation of a Strategic Sales and Marketing Plan that integrates the marketing disciplines of sales, marketing, and public relations to create brand awareness for Lee County / *The Beaches of Fort Myers & Sanibel* to consumers and the travel trade to the United Kingdom, Ireland, and Scandinavia.

- 5.2 The successful Firm shall develop and maintain strong trade relationships with top wholesalers, retail travel agencies, airlines, and the meetings and incentive market, and/or develop tactical campaigns to promote Lee County, Florida and increase destination visibility through press articles, news, trade shows, feature stories, etc. The representing Firm shall solicit and secure interested partners to provide Lee County brand exposure to their staff and clients. The Firm shall develop, as part of the Strategic Sales and Marketing Plan, a Fully Integrated Concept directed toward the travel trade with all details provided in a written brief that shall meet the VCB's established criteria for acceptance. This would include coordination, whenever possible, with the VCB's public relations, marketing, and promotions principals
- 5.3 Annually, the VCB develops and executes marketing campaigns. The representing Firm shall be the resource to evaluate, develop, and execute the Fully Integrated Concept, thus providing insight and recommendations on how to include the United Kingdom, Ireland, and Scandinavian travel trade into the proposed Strategic Sales and Marketing Plan.
- 5.4 Although it is highly preferred, the representing Firm does not need to be located within the Target Area, however they must have an exceptional ability to support and implement the requests and requirements of this Agreement throughout the Target Area.
- 5.5 The sales, marketing and public relations services provided under this contract by the successful Firm shall successfully carry out the VCB's current Strategic Marketing Plan, attached herein for review purposes, and achieve the following goals:
- a. Build brand awareness of Lee County's vast Tourism Product;
 - b. Facilitate and increase the number of leisure travelers to Lee County from the United Kingdom, Ireland and Scandinavia; and
 - c. Increase the average length of stay of visitors to Lee County from the United Kingdom, Irish, and Scandinavian visitors.
- 5.6 The Firm shall develop a Strategic Sales and Marketing Plan that enhances the position of Lee County tourism to key travel trade and media outlets in the United Kingdom, Ireland and Scandinavia. The Firm shall create a plan that accomplishes the following:
- a. Improved and expanded knowledge of Lee County's Tourism Product by key travel trade to increase share of featured produce and sales accomplished through marketing initiatives including, but not limited to sales missions, road shows, sales calls, trainings, trade shows, and familiarization (fam) tours.
 - b. A public relations strategy that facilitates media relations with key journalists and media that ultimately secures placement across broadcast, digital and print media channels to reinforce Lee County's position as a desirable destination to visit.
 - c. The Strategic Sales and Marketing Plan shall be fully developed with final plan provided to the Lee County VCB **within 60 days of the contract commencement date**. Final Strategic Sales and Marketing Plan must include the Fully Integrated Concept details.
- 5.7 The representing Firm shall report on a monthly basis any competitive strategies and efforts that may be taking place in the United Kingdom, Ireland, and Scandinavia. During the term of the agreement, the representative shall be required to provide the following travel trade services that include, but are not limited to: Sales and Marketing, Public Relations, and Measurements and Accountability. The following articles provide some details of the services to be provided under each travel trade service category.

5.8 SALES AND MARKETING:

5.8.1 SALES

- a. Serve as the primary contact for the Lee County VCB in the Target Area of the United Kingdom, Ireland, and Scandinavia.
- b. Conduct an annual audit of how well the Lee County Tourism Product (including air service development) is represented in the United Kingdom, Irish, and Scandinavian markets; to include tour operator production.
- c. Develop and implement an Annual Travel Trade Plan, as part of the overall Sales and Marketing Plan, that supports activities mentioned herein. The plan shall recommend promotional activity and provide suggest advertising recommendations.
- d. Identify and recommend sales and marketing opportunities in addition to potential partnerships in the United Kingdom, Ireland, and Scandinavia.
- e. Create and maintain strong relationships with tour operators, travel agents, airlines, meeting professionals, call centers and press.
- f. Prepare, host, and complete monthly sales calls and presentations to key accounts in the Target Area.
- g. Jointly coordinate sales missions, sales blitzes when requested during the contract period, to include airline participation, function organization, and invitations to industry representatives. The function will include, but is not limited to: meals, press conferences, seminars, workshops, presentations, and other activities and logistics.
- h. Coordinate and attend key industry trade shows, product launches, and seminars.
- i. Coordinate in market presentations and seminars in partnership with tour operators, airlines, and wholesalers to educate the travel industry in assigned territory about the destination.
- j. Manage the day-to-day activities on all tour operator and travel agent accounts in territory through the VCB's Customer Relationship Management (CRM) program, Simpleview, for the purpose of ensuring quality bookings for the local hospitality community.
- k. Work with local industry hotel partners to coordinate an in-market sales mission to key cities and provinces within the Lee County VCB Target Area.
- l. Initiate, develop itineraries, and escort familiarization trips to destination for selected tour operators travel agents, meeting, and incentive trade during the contract period. The Firm shall obtain airline participation (seats) and qualify participants.
- m. Conduct quarterly tour operator reservation trainings within the Target Area.
- n. Identify and participate in industry travel trade and consumer trade shows to represent Lee County in the Target Area.
- o. Establish *The Beaches of Fort Myers & Sanibel* in the assigned Target Area as a desirable destination for holiday travel, while positioning it to successfully compete for market share with other highly recognized destinations.

5.8.2 MARKETING

- a. Provide assistance and support to consumer advertising campaigns. The Firm shall be a resource for review and evaluation for the campaign and provide insights and recommendations on how to include the travel trade in the plan.

- b. Assist the VCB by providing translations of trade material for distribution where appropriate.
- c. Provide direction and copy for VCB marketing materials such as holiday guides, digital, e-mail blasts, etc.
- d. Analyze state, national, and international tourism plans; complete an inventory of Visit Florida and Brand USA plans in the United Kingdom, Ireland, and Scandinavia, to identify areas of coordination.
- e. Coordinate marketing activities in the Target Area in consultation with designated VCB staff liaison(s).
- f. Provide assistance and support to consumer advertising campaigns in the United Kingdom, Ireland, and Scandinavia.
- g. Assist in developing an effective communication messaging strategy by working with the VCB's advertising agency of record to review creative and provide input on campaign elements.
- h. Assist in the implementation of advertising and coop marketing programs that shall showcase the destination in Target Area.
- i. Provide recommendations for content on VCB's web site (consumer and travel trade) under the direction of Lee VCB staff liaison(s).
- j. Maintain a supply of Lee County VCB collateral materials in appropriate office supporting the Target Area.

5.8.3 ADMINISTRATIVE

- a. Provide regular monthly reports of activities which shall include at minimum:
 - i. A list of sales and media calls conducted with pertinent discussion points.
 - ii. General market summary and trend information to include economic conditions.
 - iii. Competitor observations and perceptions of *The Beaches of Fort Myers & Sanibel* brand.
 - iv. Trade shows, sales activities and public relations activities, or events attended or conducted.
 - v. Tour operator/wholesale program development and lead generation on a quarterly basis.
 - vi. A summary of contacts made, requests and inquiries serviced during reporting period.
- b. Maintain Lee County Simpleview database of the United Kingdom, Irish, and Scandinavian tour operators, travel agents as well as incentive, airline, key contacts and media to be updated daily, weekly, and monthly.
- c. Maintain inventory of Lee County VCB collateral material (including hotels, attractions and other Lee County hospitality partners) for distribution to travel trade clients.
- d. Ensure a dedicated account executive assigned to Lee County / *The Beaches of Fort Myers & Sanibel* account that is fluent in English inclusive of both verbal and written communication.

5.9 PUBLIC RELATIONS - MEDIA COMPONENT:

5.9.1 PUBLIC RELATIONS

- a. Under the direction of the VCB staff, develop an ongoing media relations strategy for the Target Area.
- b. Maintain on-going media relations with journalists in identified Target Area.
- c. Write or translate and distribute news releases/e-newsletters.

- d. Aggressively pitch *The Beaches of Fort Myers & Sanibel* stories to the United Kingdom, Irish and Scandinavian media.
- e. Work with VCB main office to service journalist requests for materials, images, etc..
- f. Assist in the development and execution of media events and activities.
- g. Assist with securing journalists to participate in Lee County events and media research trips.
- h. Assist with media promotions and social media campaigns.
- i. Develop a media list of journalists in the United Kingdom, Ireland, and Scandinavian that shall become a proprietary database for Lee County. Only media interested in the Florida destination and more specifically in the region of *The Beaches of Fort Myers and Sanibel* area shall be included in this database.
- j. Track editorial coverage and provide updated information each month. The costs of a clipping service shall be covered by the Lee County VCB.
- k. Keep the VCB informed on travel issues and trends that may affect marketing initiatives.
- l. Assist with issues management/crisis communications.

5.9.2 ADMINISTRATIVE

- a. Provide regular monthly reports of activities which shall include at minimum:
 - i. A list of media calls conducted with pertinent discussion points.
 - ii. Tourism statistical data, industry news from the United Kingdom, Ireland, and Scandinavian, as well as general market summary and trend information to include economic conditions.
 - iii. Competitor observations and perceptions of *The Beaches of Fort Myers & Sanibel*
 - iv. Public relations activities or events attended or conducted.
 - v. A summary of contacts made, requests and inquiries serviced during reporting period.
- b. Maintain Lee County Simpleview database of the Target Area key media contacts, journalists and travel writers interested in the Florida destination and more specifically in the region of *The Beaches of Fort Myers and Sanibel*.
- c. Media database shall be updated daily, weekly, and monthly as requested and directed by the VCB.
- d. Maintain inventory of Lee County VCB collateral material (including hotels, attractions and other Lee County hospitality partners) for distribution to travel media clients.
- e. Ensures a dedicated account executive assigned to Lee County / *The Beaches of Fort Myers & Sanibel* account is fluent in English inclusive of both verbal and written communication.
- f. Participate in regular phone calls with VCB public relations staff in addition to monthly conference call with VCB PR team and other VCB international contractors.

5.10 MEASUREMENTS AND ACCOUNTABILITY

- a. Work with VCB staff and leadership to develop and meet annual goals and objectives designed to increase in visitation from the United Kingdom, Ireland, and Scandinavia to Lee County, Florida.
- b. Reach or exceed mutually-agreed to public relations goals.
- c. Identify and schedule a minimum of twelve (12) journalists from Target Area to visit Lee County annually.

- d. Achieve a minimum of \$500,000 in editorial coverage from Target Area for Lee County.
- e. Coordinate one (1) media promotion with a value in excess of \$50,000.
- f. Perform at minimum three (3) sales calls to tour operators, airlines, retail agents on a monthly basis.
- g. Conduct a minimum of three (3) tour operator reservation trainings annually.
- h. Identify and participate in a minimum of ten (10) travel trade and consumer trade show events in the Target Area to represent the destination.
- i. Organize, coordinate, and escort a minimum of two (2) familiarization tours to Lee County from the Target Area annually.
- j. Enter leads and contacts generated through all activities paid for and on behalf of the Lee County VCB into the Simpleview CRM system on a monthly basis at minimum.
- k. Provide detailed records of expenditures, appropriate invoices, and verification of exchange rates for proper reimbursement, in detail and format as requested by the Lee County VCB.

6. PRICING AND FEES

6.1 Under this Agreement the VCB expects to cover the below tasks and associated costs in lieu of the representing Firm. This list is not intended to be all inclusive and is subject to change at the sole discretion of the County. Proposer shall exclude such fees from proposal pricing provided to County.

- a. Lee County VCB shall provide to the representing Firm one (1) Simpleview subscription (1 user name and password access) in order to fulfill the Simpleview requirements of this contract inclusive of any renewals. Any additional subscriptions shall be purchased by or billed to the representing Firm.
- b. Clipping service associated with editorial coverage.
- c. VCB Trade Show Registrations
Below table provides the proposed FY17-18 Show Participation / Sales Calls and estimated costs to be paid for by the VCB and Proposer. All show costs are estimates and subject to higher or lower costs.

See table on following page.

VCB TRADE SHOW REGISTRATIONS				
Proposed FY17-18				
Show Participation / Show Calls				
Month	Event	Location	Estimated Costs Paid by VCB	Estimated Costs Paid by Proposer
October	Visit USA Consumer Show Sales Calls & Trainings	London, England United Kingdom	\$1,500	\$500
November	World Travel Market United Kingdom Trade Luncheon	London, England London, England	\$6,000	\$1,500
December	Sales Calls & Trainings Sales Calls	United Kingdom Scandinavia	\$0.00	\$500 \$500
January	Florida Beaches Coalition FL Beaches - Holiday World	Scandinavia Ireland	\$2,000	\$0.00
February	FL Beaches Coalition	Herning, Denmark	\$2,000	\$0.00
March	Swanson (FL Beaches Coalition) TUR (FL Beaches Coalition)	Copenhagen, Denmark Gothenburg, Sweden	\$1,250	\$0.00
April	Sales Calls/Trainings Routes Europe	United Kingdom Europe (rotates)	\$2,500	\$500
May	International Pow Wow Irish Trade Luncheon	Denver, CO Dublin, Ireland	\$6,000	\$1,500
June	Sales Mission	UK, Ireland, Scandinavia	\$2,000	\$3,000
July	Visit USA Ball	London, England	\$0.00	\$3,000
August	UK/Ireland/Scandinavia Familiarization Tour	Lee County, FL	\$3,000	\$2,000
September	Sales Calls & Training Discover America Workshop	United Kingdom Sweden	\$1,750	\$500
Total			\$28,000	\$13,500

7. INDEPENDENT CONTRACTOR NOTICE

7.1 The Firm, in performing services specified herein, shall act at all times as an independent contractor and shall control the work and the manner in which it is performed. The Firm is not to be considered an agent or employee of the County and is not entitled to participate in any pension plan, worker's compensation plan, insurance, bonus, or similar benefits the County provides its employees. In the event the County exercises its right to terminate this agreement pursuant to terms provided herein, the Firm expressly agrees that it shall have no recourse or right of appeal under rules, regulations, ordinances, or laws applicable to employees.

End of Detailed Specifications Section

SUBMITTAL REQUIREMENTS & EVALUATION CRITERIA

1. SUBMITTAL REQUIREMENTS & EVALUATION CRITERIA

- 1.1 Interested Firms shall include the following information in their submittal responses to this solicitation. The following format and sequence should be followed in order to provide consistency in the firm's responses and to ensure each proposal receives full consideration. Use 8 ½ x 11 sheet pages only with minimum font size of 10 points and with tabs or section dividers to separate sections as defined below. More than one section is permitted on one page unless otherwise indicated below. Undesignated information shall be inserted at the rear of each package. Place page numbers at the bottom of every page, excluding dividers. Proposal documents should not contain links to other web pages; such links will not be reviewed for evaluation purposes.
- 1.2 Submittal package may not exceed **35 pages** printed single-sided; **page restriction excludes required forms found herein and dividers**. **PLEASE INCLUDE PAGE TABS/SECTION DIVIDERS** so that those evaluating your submittal can easily compare each section with others that are submitted. If any of the information provided by the Firm is found to be, in the sole opinion of the Evaluation Committee and Procurement Management Director, substantially unreliable their proposal may be rejected.
- 1.3 Firms shall submit one (1) original hard copy (clearly marked as such) and six (6) electronic version(s) on a USB flash drive set(s) containing the proposal submittal in an unlocked PDF format. The County may request specific files be submitted in specialty format (IE: Provide a Project Timeline in Excel format.) Vendor shall accommodate such specialty requests as stated within the submittal requirements describe herein. Should files not be provided in the format or quantity as requested Vendor may be deemed Non-Responsive and therefore ineligible for award. In case of any discrepancies, the original will be considered by the County in evaluating the Proposal, and the electronic version is provided for the County's administrative convenience only. Limit the color and number of images to avoid unmanageable file sizes.

COVER PAGE: Introduction

- Project RFP Number & Name
- Firm's Name & Principal Address
- Firm's Contact Person & Information (phone, fax and email address)

TAB 1: Tourism Industry Experience & Support Office Location

- Provide a description of your Firm's overall history in the Tourism Industry. Include a narrative describing your Firm's specific experience in the Tourism Industry within the VCB's Target Area of the United Kingdom, Ireland, and Scandinavia. Description should include details such as: abilities, capacity, skill, strengths, number of years, training, recorded success, etc...

TAB 2: Similar Work Experience

- Provide details of a minimum of three (3) projects/clients to which your Firm provided services similar in scope and size to that being requested through this solicitation that your firm has completed recently or currently manages. Details for each project/client services example provided should include:
 - Client Name
 - Client Address
 - Client Contact Information
 - Point of contact Name, Phone, and Email
 - Brief description of work and/or services provided.
 - Target market location(s).
 - Total annual budget.
 - Contract start date.
 - Contract finish date (if applicable).

- Provide a list of the current clients your Firm actively manages. List should be sorted largest to smallest and include total annual budget per client. Provide an indication on the list as to where the Lee County VCB would fall in terms of size in comparison to the clients your Firm currently handles.
- Provide a statement of understanding that your firm recognizes the County reserves the right to evaluate the proposing Firm on their past performance and prior dealings with Lee County (i.e., failure to meet specifications, poor workmanship, late delivery, etc.) as part of their experience criteria.

TAB 3: Firm Plan of Approach

- Provide a detailed Plan of Approach that explains how your firm intends to comply with and meet the anticipated deliverables and provide the services as detailed within this solicitation. Be specific on how your Firm intends to complete the sales, marketing, and public relation plans and concepts as well as provide the administrative support, reporting and meet the desired goals of this contract.
- Provide an example of a recently completed Sales and Marketing Plan, Print Campaign for Tourism Destination, or equivalent product, similar to what is being requested through this solicitation, that has been created by your Firm and showcases your Firm's qualifications and expertise. Example work product may be provided solely in digital format or hard copy depending on size and at Proposer's convenience. **Example work product shall not be included as part of page restrictions.**

TAB 4: Personnel / Resources

- Provide a detailed description of the firm's **specific** project management team that will be assigned to the Lee County contract. Identify the roles and responsibilities of the primary team members as they pertain/apply to requested services and include details that demonstrate individual's knowledge and understanding of the types of services to be performed as well as previous experience in similar or related work.
- Provide resumes of proposed **specific** project management team to be assigned to the Lee County contract. **Resumes should include languages spoken and fluency level.**
Resumes are not included within page restrictions, but should be limited to one (1) page per person.
- Firm must identify the staff member that will serve as Project Director whom shall be authorized and responsible to act on behalf of the Consultant with respect to directing, coordinating and administering all aspects of the services to be provided and performed. **Project Director must be fluent in English (both written and verbal fluency required).**
- Provide a statement acknowledging your Firm's understanding that the project management team/key team members assigned to the Lee County contract, as described above, shall not be substituted without the expressed permission of Lee County.
- Provide a description of additional resources (exclusive of personnel) that may be implored to support the Lee County VCB for this contract. Include details as to how the resources are intended to be utilized and the benefit to the VCB and this contract.

TAB 5: Support Office Location

- Provide location details of the specific office location that shall be the primary office to support this Contract and describe how this location will be the best option to serve the VCB's desired Target Area of the United Kingdom, Ireland, and Scandinavia. Remember, that although not required, it is the preference of the VCB that the representing Firm be located or have an office to support this contract located within the desired Target area.

TAB 6: Detailed Proposal

- The County's anticipated annual spend for all the services described and requested herein is approx.. \$300,000. Firms shall provide a Detailed Proposal on your Firm letterhead that includes a detailed description **and line item breakdown** of all deliverables and proposed personnel that make up the annual services expected to be received from the County through this Agreement. **Total pricing of the detailed proposal shall not exceed \$300,000.**
- Detailed Proposal should include, and may not be limited to, line item pricing for the below deliverables and proposed personnel:
 - **DELIVERABLES**
 - Complete Strategic Sales and Marketing Plan
 - Strategic Sales and Marketing Plan shall include the Fully Integrated Concept and Travel Trade Plan
 - Plan and Participate in proposed trade shows.
 - Proposed trade shows are described in article 6.1 on pages 21-22.
 - Pay and process Membership Fees for proposed media outlets
 - Minimum Media Outlets include:
 - Discover America Nordic
 - Discover America Denmark
 - Visit USA – Ireland
 - Visit USA - UK
 - Provide regular monthly services as outlined herein.
 - Provide all other representation and services as described herein and any additional services your Firm proposes be included to achieve the desired outcome of the County VCB.
 - **PERSONNEL HOURLY RATE**
 - President / CEO
 - Account Manager / Executive
 - Sales & Marketing Representative (if different from account manager)
 - Public Relations / Communications Representative
 - Administrative Support
- Proposers shall list any expected reimbursables on Detailed Proposal. Reimbursables may not exceed or cause annual fee to exceed \$300,000.
 - Travel shall only be paid in accordance with applicable Lee County policies and other governing standards (statutes, laws, etc...)
- Proposers may list additional deliverables and/or personnel as part of their Detailed Proposal. **Detailed Proposal may not exceed \$300,000.**
- Pricing shall be provided and invoiced in U.S. Dollars providing currency exchange rate source for the course of the Agreement any applicable renewals.
- Pricing provided as part of the submission shall be utilized for evaluation purposes and may be utilized for award purposes. The County does however reserve the right to negotiate pricing with the number 1 selected Firm as a condition of award.

TAB 7: Required Forms

- Forms 1- 9

2. SCORING CRITERIA & WEIGHT

CRITERIA & TAB	CRITERIA DESCRIPTION	MAX. POINTS AVAILABLE
1	TOURISM INDUSTRY EXPERIENCE	30
2	SIMILAR WORK EXPERIENCE	20
3	FIRM PLAN OF APPROACH	20
4	PERSONNEL / RESOURCES	10
5	SUPPORT OFFICE LOCATION	5
6	DETAILED PROPOSAL	15
TOTAL POINTS		100
*Additional details and documents found within submittal package, although not located within tabs as listed above, may be reviewed and considered by evaluation committee when scoring Firms.		

3. RFP SUBMISSION SCHEDULE

Submission Description	Date(s)	Time
Advertise Request for Proposal (RFP)	Friday, June 16, 2017	N/A
Pre-Proposal Meeting	N/A	N/A
Proposal Question Deadline	8 Calendar days prior to submission deadline	Prior to 5:00 PM
Submission Deadline	Wednesday, July 19, 2017	Prior to 2:30 PM
First Committee Meeting & Discussion	TBD	TBD
Notify Shortlist Selection via e-mail (If applicable)	TBD	N/A
Final Scoring/Selection Meeting (If applicable)	TBD	TBD

Additional notes on Submission Schedule:

- *Submission Schedule is provided as a guideline only and is subject to change at the discretion of Lee County authorized personnel.*
- *Changes in closing date or other parameters may occur and will be posted to the Lee County Procurement website. It shall be the responsibility of Contractor to verify all dates through County website.*
- *Unless otherwise stated, location of all openings and meetings will take place at 1500 Monroe Street, Fort Myers, FL 33901 – 4th Floor Procurement Management.*

End of Submittal Requirements & Evaluation Criteria Section

REQUIRED FORMS

REQUEST FOR PROPOSAL (NON-CCNA)

These forms are required and should be submitted with all proposals. If it is determined that forms in this selection are not applicable to your company or solicitation they should be marked “N/A or Not Applicable” across the form in large letters and returned with your submission package. *Note:* If submitting via hard copy the original must be a manually signed original. Include additional copies, if specified, in the Solicitation documents.

Form # Title/Description

1 ***Solicitation Response Form***

All signatures must be by a corporate authorized representative, witnessed, and corporate and/or notary seal (if applicable.) The corporate or mailing address must match the company information as it is listed on the Florida Department of State Division of Corporations. Attach a copy of the web-page(s) from <http://www.sunbiz.org> as certification of this required information. Sample attached for your reference.

Verify that all addendum(s) have been received and tax identification number has been provided.

1a ***Proposal Form***

This form is used to provide itemization of project cost. A more detailed “schedule of values” may be requested by the County

1b ***Business Relationship Disclosure Requirement (if Applicable)***

Sections 112.313(3) and 112.313(7), FL § , prohibit certain business relationships on the part of public officers and employees, their spouses, and their children. If this **disclosure is applicable request form** “*INTEREST IN COMPETITIVE BID FOR PUBLIC BUSINESS*” (Required by 112.313(12)(b), Florida Statute (1983)) to be completed and **returned with solicitation response**. **It is the proposer’s responsibility to request form and disclose this relationship, failure to do so could result in being declared non-responsive.**

NOTICE: UNDER THE PROVISIONS OF FL § #112.317 (1983), A FAILURE TO MAKE ANY REQUIRED DISCLOSURE CONSTITUTES GROUNDS FOR AND MAY BE PUNISHED BY ONE OR MORE OF THE FOLLOWING: IMPEACHMENT, REMOVAL OR SUSPENSION FROM OFFICE OR EMPLOYMENT, DEMOTION, REDUCTION IN SALARY, REPRIMAND, OR A CIVIL PENALTY NOT TO EXCEED \$5,000.00.

2 ***Affidavit Certification Immigration Laws***

Form is acknowledgement that the proposer is in compliance in regard to Immigration Laws.

3 ***Reference Survey***

Provide this form to a minimum of three references. This form will be turned in with the bid or proposal package.

1. **Section 1:** Bidder/Proposer to complete with reference respondent’s information prior to providing to them for their response. (This is **not** the Bidder/Proposer’s information.)
2. **Section 2:** Enter the name of the Bidder/Proposer; provide the project information that the reference respondent is to provide a response for.
3. The reference respondent should complete “**Section 3.**”
4. **Section 4:** The reference respondent to print and sign name
5. A **minimum of 3 reference responses** are requested to be returned with bid or proposal package.
6. Failure to obtain reference surveys may make your company non-responsive.

4 *Negligence or Breach of Contract Disclosure Form*

The form may be used to disclose negligence or breach of contract litigation that your company may be a part of over the past ten years. You may need to duplicate this form to list all history. If the proposer has more than 10 lawsuits, you may narrow them to litigation of the company or subsidiary submitting the solicitation response. Include, at a minimum, litigation for similar projects completed in the State of Florida. Final outcome should include in whose favor the litigation was settled and was a monetary amount awarded. The settlement amount may remain anonymous.

If you have **no litigation**, enter **“None”** in the first **“type of incident”** block of the form. Please do not write N/A on this form.

5 *Affidavit Principal Place of Business - **NOT APPLICABLE TO THIS PROJECT***

Certifies proposer’s location information. Local Vendor Preference and Location Point values are excluded when prohibited by grant or funding source. (In such cases form will be informational only.)

6 *Sub-Contractor List (if applicable)*

To be completed and returned when sub-contractors are to be utilized and are known at the time of the submission.

7 *Public Entity Crimes Form (Required form)*

Any person or affiliate as defined by statute who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a bid or a contract to provide any goods or services to the County; may not submit a bid on a contract with the County for the construction or repair of a public building or a public work; may not submit bids or leases of real property to the County; may not be awarded or perform works as a contractor, supplier, subcontractor, or consultant under a contract with the County, and may not transact business with the County in excess of \$25,000.00 for a period of 36 months from the date of being placed on the convicted vendor list.

8 *Trench Safety - **NOT APPLICABLE TO THIS PROJECT***

Self explanatory.

9 *Bid Bond - **NOT APPLICABLE TO THIS PROJECT***

Self explanatory

Proposal Label (Required)

Self explanatory. Please affix to the outside of the sealed submission documents. The mailing envelope **MUST** be sealed and marked with:

- ✓ Solicitation Number
- ✓ Opening Date and/or Receiving Date
- ✓ Mailing Address:

Lee County Procurement Management Division
1500 Monroe Street, 4th Floor Fort Myers, FL 33901

Include any licenses or certifications requested (if applicable)

It is the Proposer’s responsibility to insure the Solicitation Response is mailed or delivered in time to be received no later than the specified opening date and time. (If solicitation is not received prior to deadline it shall not be considered or accepted.)

Form 1 – Solicitation Response Form



LEE COUNTY PROCUREMENT MANAGEMENT
SOLICITATION RESPONSE FORM

Date Submitted: _____ Deadline Date: 7/19/2017

SOLICITATION IDENTIFICATION: RFP170282LAC

SOLICITATION NAME: Lee County Visitor & Convention Bureau United Kingdom, Ireland, and Scandinavia Representation

COMPANY NAME: _____

NAME & TITLE: (TYPED OR PRINTED) _____

BUSINESS ADDRESS: (PHYSICAL) _____

CORPORATE OR MAILING ADDRESS: _____

[] SAME AS PHYSICAL

ADDRESS MUST MATCH SUNBIZ.ORG

E-MAIL ADDRESS: _____

PHONE NUMBER: _____ FAX NUMBER: _____

NOTE REQUIREMENT: IT IS THE SOLE RESPONSIBILITY OF THE VENDOR TO CHECK LEE COUNTY PROCUREMENT MANAGEMENT WEB SITE FOR ANY ADDENDA ISSUED FOR THIS PROJECT. THE COUNTY WILL POST ADDENDA TO THIS WEB PAGE, BUT WILL NOT NOTIFY.

In submitting this proposal, Proposer makes all representations required by the instructions to Proposer and further warrants and represents that: Proposer has examined copies of all the solicitation documents and the following addenda:

No. _____ Dated: _____ No. _____ Dated: _____ No. _____ Dated: _____
No. _____ Dated: _____ No. _____ Dated: _____ No. _____ Dated: _____

Tax Payer Identification Number: _____

(1) Employer Identification Number -OR- (2) Social Security Number:

** Lee County collects your social security number for tax reporting purposes only

Please submit a copy of your registration from the website www.sunbiz.org establishing the Proposer/firm as authorized (including authorized representatives) to conduct business in the State of Florida, as provided by the Florida Department of State, Division of Corporations.

1 Collusion Statement: Lee County, Fort Myers, Florida The undersigned, as Proposer, hereby declares that no person or other persons, other than the undersigned, are interested in this solicitation as Principal, and that this solicitation is submitted without collusion with others; and that we have carefully read and examined the specifications or scope of work, and with full knowledge of all conditions under which the services herein is contemplated must be furnished, hereby propose and agree to furnish this service according to the requirements set out in the solicitation documents, specifications or scope of work for said service for the prices as listed on the county provided price sheet or (CCNA) agree to negotiate prices in good faith if a contract is awarded.

2 Scrutinized Companies Certification: Section 287.135, FL § , prohibits agencies from contracting with companies, for goods or services over \$1,000,000, that are on either the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List. Both lists are created pursuant to section 215.473, FL § . As the person authorized to sign on behalf of Respondent, I hereby certify that the company identified above not listed on either the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List. I understand that pursuant to section 287.135, FL § , the submission of a false certification may subject company to civil penalties, attorney's fees, and/or costs.

Form#1 – Solicitation Form, Page 2

3 Business Relationship Disclosure Requirement: Sections 112.313(3) and 112.313(7), FL § , prohibit certain business relationships on the part of public officers and employees, their spouses, and their children. See Part III, Chapter 112, FL § and/or the brochure entitled "A Guide to the Sunshine Amendment and Code of Ethics for Public Officers, Candidates and Employees" for more details on these prohibitions. However, Section 112.313(12), FL § (1983), provides certain limited exemptions to the above-referenced prohibitions, including one where the business is awarded under a system of sealed, competitive bidding; the public official has exerted no influence on bid negotiations or specifications; and where disclosure is made, prior to or at the time of the submission of the bid, of the official's or his spouse's or child's interest and the nature of the intended business. The Commission on Ethics has promulgated this form for such disclosure, if and when applicable to a public officer or employee.

If this disclosure is applicable request form "INTEREST IN COMPETITIVE BID FOR PUBLIC BUSINESS" (Required by 112.313(12)(b), Florida Statute (1983)) to be completed and returned with solicitation response. It is the proposer's responsibility to disclose this relationship, failure to do so could result in being declared non-responsive.

Business Relationship Applicable (request form)

Business Relationship NOT Applicable

4 Disadvantaged Business Enterprise (DBE) proposer? If yes, please attach a current certificate. Yes No

ALL PROPOSALS MUST BE EXECUTED BY AN AUTHORIZED AUTHORITY OF THE PROPOSER. WITNESSED AND SEALED (IF APPLICABLE)

Company Name (Name printed or typed)



(Affix Corporate Seal, if applicable)

Authorized Representative Name (printed or typed)

Authorized Representative's Title (printed or typed)

Witnessed/Attested by:

(Witness/Secretary name and title printed or typed)

Authorized Representative's Signature

Witness/Secretary Signature

Any blank spaces on the form(s), qualifying notes or exceptions, counter offers, lack of required submittals, or signatures, on County's Form may result in the submission being declared non-responsive by the County.

Detail by Entity Name
Florida Profit Corporation
Bill's Widget Corporation

Filing Information
Document Number 655555
FEI/EIN Number 5111111111
Date Filed 09/22/1980
State FL
Status ACTIVE
Last Event AMENDED AND RESTATED ARTICLES
Event Date Filed 07/25/2006
Event Effective Date NONE

Principal Address
555 N Main Street
Your Town, USA 99999
Changed 02/11/2012

Mailing Address
555 N Main Street
MYour Town, USA 99999
Changed 02/11/2012

Registered Agent Name & Address
My Registered Agent
111 Registration Road
Registration, USA99999
Name Changed: 12/14/2006
Address Changed: 12/14/2006

Officer/Director Detail

Name & Address
Title P
President, First
555 AVENUE
Anytown, USA99999

Title V
President, Second
555 AVENUE
Anytown, USA99999

Sample Only

Form 1a – Proposal Form



Lee County Procurement Management
PROPOSAL FORM

Company Name: _____

Solicitation # RFP170282LAC Solicitation Name Lee County Visitor & Convention Bureau United Kingdom, Ireland, and Scandinavia Representation

Detailed Proposal to be provided as part of and as described in project Submittal Requirements.

Form 2 – Affidavit Certification of Immigration Laws



LEE COUNTY
S O U T H W E S T F L O R I D A

AFFIDAVIT CERTIFICATION IMMIGRATION LAWS

SOLICITATION NO.: RFP170282LAC SOLICITATION NAME: Lee County Visitor & Convention Bureau United Kingdom, Ireland, and Scandinavia Representation

LEE COUNTY WILL NOT INTENTIONALLY AWARD COUNTY CONTRACTS TO ANY CONTRACTOR WHO KNOWINGLY EMPLOYS UNAUTHORIZED ALIEN WORKERS, CONSTITUTING A VIOLATION OF THE EMPLOYMENT PROVISIONS CONTAINED IN 8 U.S.C. SECTION 1324 a(e) {SECTION 274A(e) OF THE IMMIGRATION AND NATIONALITY ACT (“INA”).

LEE COUNTY MAY CONSIDER THE EMPLOYMENT BY ANY CONTRACTOR OF UNAUTHORIZED ALIENS A VIOLATION OF SECTION 274A(e) OF THE INA. **SUCH VIOLATION BY THE RECIPIENT OF THE EMPLOYMENT PROVISIONS CONTAINED IN SECTION 274A(e) OF THE INA SHALL BE GROUNDS FOR UNILATERAL CANCELLATION OF THE CONTRACT BY LEE COUNTY.**

PROPOSER ATTESTS THAT THEY ARE FULLY COMPLIANT WITH ALL APPLICABLE IMMIGRATION LAWS (SPECIFICALLY TO THE 1986 IMMIGRATION ACT AND SUBSEQUENT AMENDMENTS).

Company Name: _____

Signature Title Date

STATE OF _____
COUNTY OF _____

The foregoing instrument was signed and acknowledged before me this _____ day of _____
20____, by _____ who has produced
(Print or Type Name)
_____ as identification.
(Type of Identification and Number)

Notary Public Signature

Printed Name of Notary Public

Notary Commission Number/Expiration

The signee of this Affidavit guarantee, as evidenced by the sworn affidavit required herein, the truth and accuracy of this affidavit to interrogatories hereinafter made. **LEE COUNTY RESERVES THE RIGHT TO REQUEST SUPPORTING DOCUMENTATION, AS EVIDENCE OF SERVICES PROVIDED, AT ANY TIME.**

Form 3 Reference Survey



Lee County Procurement Management
REFERENCE SURVEY
RFP170282LAC, Lee County Visitor & Convention Bureau United Kingdom, Ireland, and Scandinavia Representation

Section 1 Reference Respondent Information	Please return completed form to:
FROM: _____ COMPANY: _____ PHONE #: _____ FAX #: _____ EMAIL: _____	Bidder/Proposer: _____ Due Date: _____ Total # Pages: 1 Phone #: _____ Fax #: _____ Bidder/Proposer E-Mail: _____

Section 2	Enter Bidder/Proposer Information , if applicable Similar Performed Project (Bidder/Proposer to enter details of a project performed for above reference respondent)		
Proposer Name:			
Reference Project Name:	Project Address:	Project Cost:	
Summarize Scope:			

You as an individual or your company has been given as a reference on the project identified above. Please provide your responses in section 3 below.

Section 3	Indicate: "Yes" or "No"
1. Did this company have the proper resources and personnel by which to get the job done?	
2. Were any problems encountered with the company's work performance?	
3. Were any change orders or contract amendments issued, other than owner initiated?	
4. Was the job completed on time?	
5. Was the job completed within budget?	
6. On a scale of one to ten, ten being best, how would you rate the overall work performance, considering professionalism; final product; personnel; resources. Rate from 1 to 10. (10 being highest)	
7. If the opportunity were to present itself, would you rehire this company?	
8. Please provide any additional comments pertinent to this company and the work performed for you:	

Section 4	
Reference Name (Print Name)	Please submit non-Lee County employees as references
Reference Signature	



**ALLEGED NEGLIGENCE OR BREACH OF CONTRACT
DISCLOSURE FORM**

Please fill in the form below. Provide each incident in regard to alleged negligence or breach of contract that has occurred over the past 10 years. Please complete in chronological order with the most recent incident on starting on page 1. Please do not modify this form (expansion of spacing allowed) or submit your own variation.

Company Name: _____

Type of Incident <i>Alleged Negligence or Breach of Contract</i>	Incident Date And Date Filed	Plaintiff <i>(Who took action against your company)</i>	Case Number	Court <i>County/State</i>	Project	Claim Reason <i>(initial circumstances)</i>	Final Outcome <i>(who prevailed)</i>

Make as many copies of this sheet as necessary in order to **provide a 10 year history** of the requested information. If there is no action pending or action taken in the last 10 years, complete the **company name and write "NONE" in the first "Type of Incident" box** of this page and return with your proposal package. This form should also include the primary partners listed in your proposal. Do not include litigation with your company as the plaintiff. Final outcome should include who prevailed and what method of settlement was made. If a monetary settlement was made the amount may remain anonymous.

Page Number: _____ Of _____ Total pages

Update the page number to reflect the current page and the total number of pages. Example: Page 3, of 5 total submitted pages of this form.

Form 5 - Affidavit Principal Place of Business - **NOT APPLICABLE TO PROJECT**



AFFIDAVIT PRINCIPAL PLACE OF BUSINESS

Local Vendor Preference (Non-CCNA)
(Lee County Ordinance No. 08-26)
Location Identification (CCNA)

Instructions: Please complete all information that is applicable to your firm

Company Name: _____

Printed name of authorized signer

Title

⇒ _____
Authorized Signature

Date

The signee of this Affidavit guarantee, as evidenced by the sworn affidavit required herein, the truth and accuracy of this affidavit to interrogatories hereinafter made. **LEE COUNTY RESERVES THE RIGHT TO REQUEST SUPPORTING DOCUMENTATION, AS EVIDENCE OF SERVICES PROVIDED, AT ANY TIME.**

Notary:
State of _____
County of _____

The foregoing instrument was signed and acknowledged before me this _____ day of _____

20 _____, _____ who has produced

_____ as identification (or personally known)
Type of ID and number

⇒ _____
Notary Public Signature

Notary Commission Number and expiration

1. Principal place of business is located within the boundaries of: _____ Lee County
_____ Collier County
_____ Non-Local

Local Business Tax License # _____

2. Address of Principal Place of Business: _____

3. Number of years at this location _____ years

4. Have you provided goods or services to Lee County on a regular basis within the past 3 consecutive years _____ Yes* _____ No *If yes, attach contractual history for past 3 consecutive years

5. Number of available employees for this contract _____

6. Does your company have a Drug Free Workplace Policy _____ Yes _____ No

Form 7: Public Entity Crime Form

This form must be signed and sworn to in the presence of a notary public or other officer authorized to administer oaths.

1. This sworn statement is submitted to _____
(Print name of the public entity)

by _____
(Print individual's name and title)

for _____
(Print name of entity submitting sworn statement)

whose business address is _____

(If applicable) its Federal Employer Identification Number (FEIN) is _____

(If the entity has no FEIN, include the Social Security Number of the individual signing this sworn statement: On the attached sheet.) Required as per IRS Form W-9.

2. I understand that a "public entity crime" as defined in Paragraph 287.133(1) (g), Florida Statutes, means a violation of any state or federal law by a person with respect to and directly related to the transaction of business with any public entity or with an agency or political subdivision of any other state or with the United States, including but not limited to, and bid or contract for goods or services to be provided to any public entity or agency or political subdivision or any other state or of the Unites States, and involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy, or material misrepresentation.

3. I understare that "convicted" or "conviction" as defined in Paragraph 287.133(1) (b), Florida Statutes, means a finding of guilt or a conviction of a public entity crime, with or without an adjudication of guilt, in any federal or state trial court of record relating to charges brought by indictment or information after July 1, 1989, as a result of a jury verdict, nonjury trial, or entry of a plea of guilty or nolo contendere.

4. I understand that "affiliate" as defined in Paragraph 287.133(1)(a), Florida Statutes, means:
1. A predecessor or successor of a person convicted of a public entity crime:
or:
2. An entity under the control of any natural person who is active in the management of the entity and who has been convicted of a public entity crime. The term "affiliate" includes those offices, directors, executives, partners, shareholders, employees, members and agents who are active in the management of the affiliate. The ownership by one person of shares constituting a controlling interest in another person, or a pooling of equipment or income among persons when not fair market value under an arm's length agreement, shall be a facie case that one person controls another person. A person who knowingly enters into a joint venture with a person who has been convicted of a public entity crime in Florida during the preceding 36 months shall be considered an affiliate.

5. I understand that a "person" as defined in Paragraph 287.133(1) (c), Florida Statutes, means any natural person or entity organized under the laws of any state or of the United States with the legal power to enter a binding contract and which bids or applies to bid on contracts for the provision of goods or services let by a public entity, or which otherwise transacts or applies to transact business with a public entity. The term "person" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in management of the entity.

6. Based on information and belief, the statement which I have marked below is true in relation to the entity submitting those sworn statement. (Please indicate which statement applies.)

_____ Neither the entity submitted this sworn statement, nor any officers, directors, executives, partners, shareholders, employees, members, and agents who are active in management of an entity nor affiliate of the entity have been charged with and convicted of a public entity crime subsequent to July 1, 1989.

Public Entity Crime Form

_____ The entity submitting this sworn statement, or one or more of the officers, directors, executives, partners, shareholders, employees, member, or agents who are active in management of the entity, or an affiliate of the entity have been charged with and convicted of a public entity crime subsequent to July 1, 1989.

_____ The entity submitting this sworn statement, or one or more of its officers, directors, executives, partners, shareholders, employees, member, or agents who are active in management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989. However, there has been subsequent proceeding before a Hearing Officer of the State of Florida, Division of Administrative Hearing and the Final Order entered by the Hearing Officer determined that it was not in the public interest to place the entity submitting this sworn statement on the convicted vendor list. (Attach a copy of the final order)

I UNDERSTAND THAT THE SUBMISSION OF THIS FORM TO THE CONTRACTING OFFICER FOR THE PUBLIC ENTITY IDENTIFIED IN PARAGRAPH 1 (ONE) ABOVE IS FOR THAT PUBLIC ENTITY ONLY AND, THAT THIS FORM IS VALID THROUGH DECEMBER 31 OF THE CALENDAR YEAR IN WHICH IS FILED. I ALSO UNDERSTAND THAT I AM REQUIRED TO INFORM THE PUBLIC ENTITY PRIOR TO ENTERING INTO A CONTRACT IN EXCESS OF THE THRESHOLD AMOUNT PROVIDED IN SECTION 287.017, FLORIDA STATUTES, FOR CATEGORY TWO OR ANY CHANGE IN THE INFORMATION CONTAINED IN THIS FORM.

(Signature)

(Date)

STATE OF _____
COUNTY OF _____

PERSONALLY APPEARED BEFORE ME, the undersigned authority, _____
(Name of individual signing)

who, after first being sworn by me, affixed his/her signature in the space provided above on this _____ day of _____, 2____.

(NOTARY PUBLIC)

My Commission Expires: _____

Form#8: Trench Safety - NOT APPLICABLE TO PROJECT

TRENCH SAFETY

Contractor/Vendor acknowledges that included in the appropriate solicitation items of the solicitation and in the Total solicitation price are costs for complying with the Florida Trench Safety Act (90-96, Laws of Florida) effective October 1, 1990. The contractor/vendor further identifies the costs of such compliance to be summarized below:

Trench Safety Measure (Description)	Units of Measure (LF, SF)	Unit (Quantity)	Unit Cost	Extended Cost
.....				
A. _____	_____	_____	_____	_____
B. _____	_____	_____	_____	_____
C. _____	_____	_____	_____	_____
D. _____	_____	_____	_____	_____
TOTAL \$ _____				

If applicable, the contractor/vendor certifies that all trench excavation done within his control in excess of five (5') feet in depth shall be in accordance with the Florida Department of Transportation's Special Provisions Article 125-1 and Sub-article 125-4.1 (TRENCH EXCAVATION SAFETY SYSTEM AND SHORING, SPECIAL-TRENCH EXCAVATION).

Failure to complete the above may result in the solicitation being declared non-responsive.

(Signature)

(Company Name)

STATE OF _____
COUNTY OF _____

The foregoing instrument was acknowledged before me this ____ day of _____ by _____ (*name and title of corporate officer*) of _____ (*name of corporation*), a _____ (*state or place of incorporation*) corporation, on behalf of the corporation. He/she is personally known to me or has produced _____ (*type of identification*) as identification.

(signature line for notary public)

(name of notary typed, printed or stamped)

(title or rank)

My commission expires:

_____ _____
(serial number, if any)

Form 9: Bid Bond – NOT APPLICABLE TO PROJECT
BID BOND

Complete EITHER Lee County Paper Bid Bond OR provide cashier's check

KNOW ALL MEN BY THESE PRESENTS, that we

_____ as Principal, and
(BIDDER'S Name)

_____ a Corporation licensed to do
(Surety's Name)

business under the laws of the State of Florida as a Surety, are held and firmly bound unto LEE COUNTY BOARD OF COUNTY COMMISSIONERS, LEE COUNTY, FLORIDA, a Political Subdivision of the State of Florida,

in the SUM OF _____
for the payment whereof, well and truly to be made, we bind ourselves, our heirs, successors, personal representatives and assigns, jointly and severally, firmly, by these presents.

SIGNED AND SEALED this _____ day of _____, _____

WHEREAS, said Principal is herewith submitting a Proposal for the Project hereby referred to as:

NOW, THEREFORE, the condition of the above obligation is such that if said Principal shall be awarded the Contract upon said Proposal within the specified time and shall enter into a written Contract, satisfactory in form, provide an acceptable Public Payment & Performance Bond from a Surety acceptable to the COUNTY and provide other Insurance as may be required to the COUNTY within seven (7) calendar days after the written Notice of Award date, or within such extended period as the COUNTY may grant, then this obligation shall be null and void; otherwise said Principal and Surety shall pay to said COUNTY in money the difference between the amount of the Bid of said Principal and the amount for which said COUNTY may legally contract with another party to perform said work, if the latter amount be in excess of the former, together with any expenses and reasonable attorney's fees incurred by said COUNTY if suit be brought here on, but in no event shall said Surety's liability exceed the penal sum hereof plus such expenses and attorney's fees. For purposes of unsuccessful bid protests filed by the Principal herein, this obligation shall bind the Surety to pay costs and damages associated with the bid protest or delays to the project upon a finding from the Board of County Commissioners for Lee County that the bid protest was frivolous and/or lacked merit. The liability of the Surety shall not exceed the penal sum of the bid bond.

Witness as to Principal:

_____ (SEAL)
(Principal)

(By)

Printed Name

Witness as to Surety:

_____ (SEAL)
(Surety's Name)

(By-As Attorney-in-Fact, Surety)

Affix Corporate Seals and attach proper Power of Attorney for Surety.

Sealed Proposal Label

Cut along the outer border and affix this label to your sealed solicitation envelope to identify it as a "Sealed Submission/Proposal".

PROPOSAL DOCUMENTS • DO NOT OPEN

SOLICITATION NO.: **RFP170282LAC**

SOLICITATION TITLE: **Lee County Visitor & Convention Bureau United Kingdom, Ireland, and Scandinavia Representation**

DATE DUE: **Wednesday, July 19, 2017**

TIME DUE: **Prior to: 2:30 PM**

SUBMITTED BY:

(Name of Company)

e-mail address

Telephone

DELIVER TO: Lee County Procurement Management
1500 Monroe 4th Floor
Fort Myers FL 33901

Note: proposals received after the time and date above will not be accepted.



Lee County Procurement Management
1500 Monroe Street, 4th Floor
Fort Myers, FL 33901
(239) 533-8881
www.leegov.com/procurement

PLEASE PRINT CLEARLY

VCB' CURRENT STRATEGIC MARKETIGN PLAN

(RE: Article 5.5, page 17)

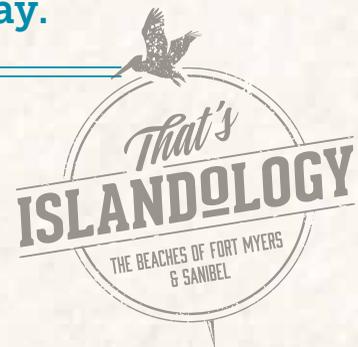
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YOUR VCB



NO 50

A getaway should actually
get you away.



MISSION

The Lee County Visitor & Convention Bureau (VCB) serves the broader interests of the economy of Lee County by acting as a marketing, sales and services organization. Our mission is multifaceted:

- Promote our destination globally
- Support tourism industry development
- Assist with preserving and protecting the area's unique attributes
- Activate the community in support of tourism

The VCB identifies and showcases what makes the area special and different from all other sun and sand destinations. Together, the sales, marketing, media relations and visitor services teams work to deliver meaningful messaging to the public, and inspire them to choose Lee County as their travel destination.

VCB FACTOIDS

- Lead marketing and promotional agency for visitation to Lee County and its 10 geographic regions
- Branded as The Beaches of Fort Myers & Sanibel
- Funded by the 5% tourist tax on short-term accommodations, commonly known as the bed tax
- 32 full-time positions
- Mentorship and management of more than 140 volunteers and local hospitality-focused college interns annually
- 5 off-site sales offices (Northeast, Midwest, Canada, United Kingdom and Germany)
- 5 functional areas – Administration, Communications, Marketing, Sales and Visitor Services



EXECUTIVE SUMMARY

Thank you to everyone who partners with the VCB to make Lee County's tourism industry thrive. FY2015-16 was another strong year, and we look forward to working with you to make FY2016-17 even better.

SOME FY2015-16 HIGHLIGHTS:

- Visitors contributed nearly \$3 billion in direct spending to the Lee County economy during 2015, a 4.6% increase over 2014 (\$2.87 billion) and 100% of the way to our four-year strategic goal.
- In-state visitation during spring and summer seasons increased year over year by 16% and 5% respectively.
- International markets delivered more than 782,000 visitors staying in paid accommodations, with Germany (+9%), Canada (+11%) and the UK (+27%) contributing the most.
- Twenty-five projects totaled \$9.7 million in funding for beach and shoreline initiatives this year.
- Our Island Hopper Songwriter Festival brought in an estimated 12,600 attendees with more than 4,000 room nights sold.

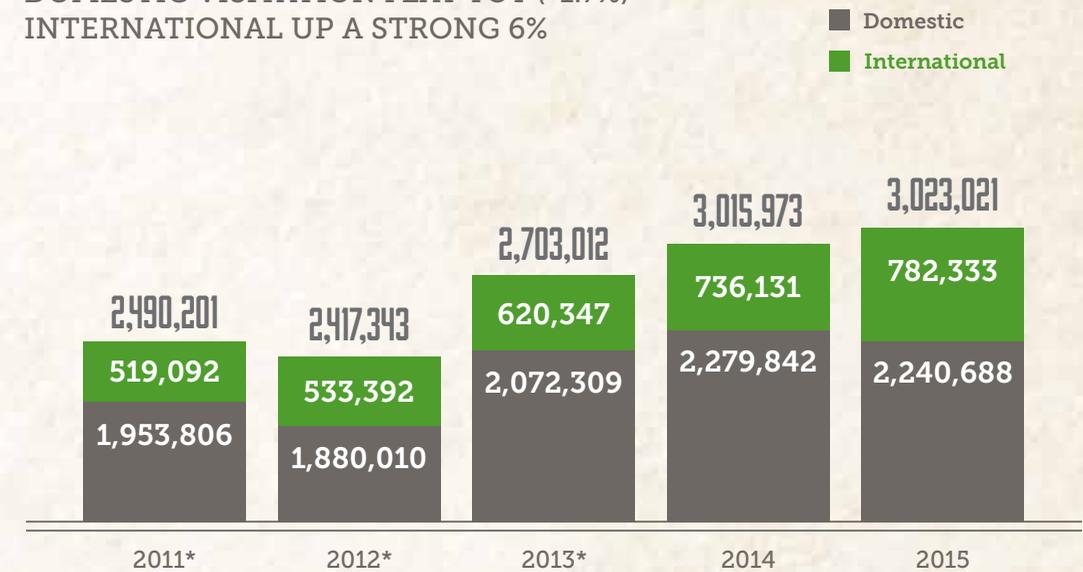
5 YEARS OF TOURISM

INDUSTRY GROWTH

VISITATION

VISITORS STAYING IN PAID ACCOMMODATIONS

DOMESTIC VISITATION FLAT YOY (-1.7%)
INTERNATIONAL UP A STRONG 6%



*Survey data does not include "No Answer" for country of origin.

Source: Davidson-Peterson Associates



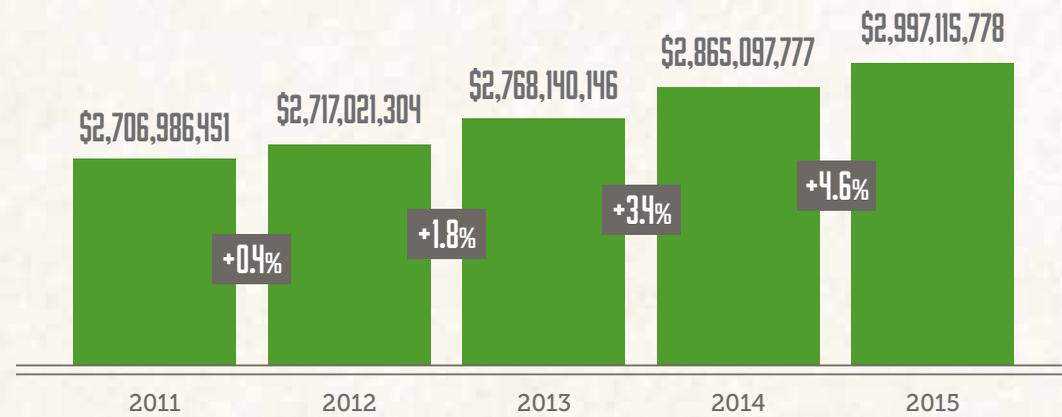
5 YEARS OF TOURISM

INDUSTRY GROWTH

VISITOR EXPENDITURES

IN TOTAL (AMONG ALL VISITORS)

2015 - 4.6% INCREASE YOY



Source: Davidson-Peterson Associates

5 YEARS OF TOURISM

INDUSTRY GROWTH

VISITOR EXPENDITURES

ON LODGING

2015 - \$708,097,216

LODGING SPEND

10.5% INCREASE YOY



Increased 214,743 in occupied room nights (+4.6%), despite decrease of 131,037 available room nights (-1.8%). The slight compression of available rooms also contributed to ADR growth.

Source: Davidson-Peterson Associates



NO 16

A full day starts with a wide-open schedule.



5 YEARS OF TOURISM

INDUSTRY GROWTH

BED TAX COLLECTION

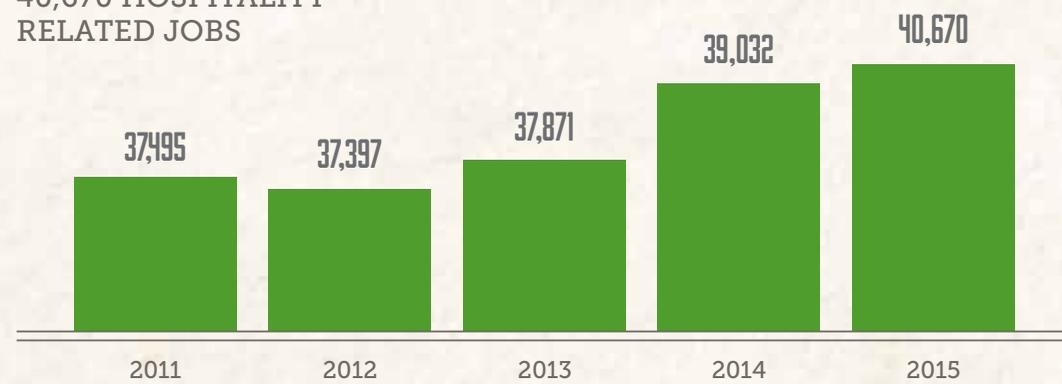


Source: Lee County Clerk of Courts

JOBS FOR RESIDENTS**

DIRECT IMPACT OF VISITOR EXPENDITURES

40,670 HOSPITALITY-RELATED JOBS



**Number of employees necessary to produce the direct output purchased with visitor expenditures.

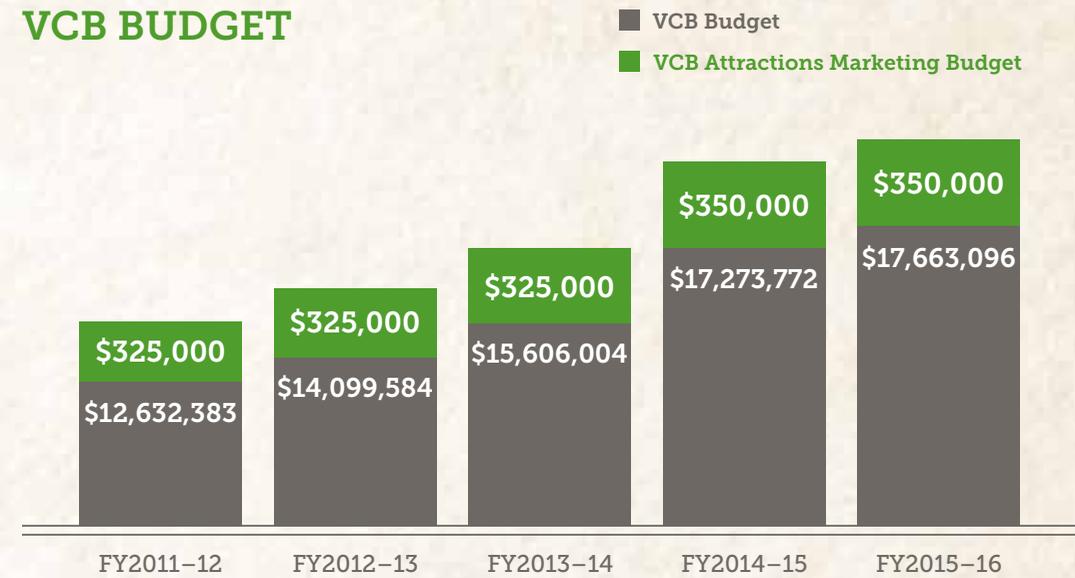
Source: Davidson-Peterson Associates





5 YEARS OF TOURISM | INDUSTRY GROWTH

VCB BUDGET



Source: Lee County Clerk of Courts





OUR OBJECTIVES

NO 19

A single visit leads to
yearly migrations.



PLAN OUTLINE

- **OUR OBJECTIVES**
- **THE YEAR THAT WAS**
- **THE ROAD AHEAD**

STRATEGIC OBJECTIVES

In FY2015–16 our marketing, sales and visitor services plans focused on delivering against the objectives defined in *Our Shared Vision for Tourism 2013–2016* strategic plan.

STRATEGIC PLAN MEASURABLES:

1. Increase annual visitor expenditures to \$3 billion
2. Grow fall season visitation by 15% over 2012 totals
3. Support lodging partners in growing RevPAR by 15%



OBJECTIVE ONE

\$3 BILLION TOTAL TOURISM SPENDING

Visitors contributed an estimated \$3 billion in direct spending to the Lee County economy during 2015, a 4.6% increase over 2014 estimated visitor spending (\$2.87 billion).

65% of 2015 total direct expenditures came from visitors staying in paid accommodations, amounting to \$2.1 billion, an 8.3% increase over 2014.

ESTIMATED EXPENDITURES (In Billions)



Source: Davidson-Peterson Associates

VISITOR EXPENDITURES

BY CATEGORY

Within the 4.6% overall increase, visitor spending has grown most significantly in the lodging category (10.5%).

TOTAL EXPENDITURES

	2014	2015	% CHANGE
TOTAL	\$2,865,097,777	\$2,997,115,778	+4.6%
FOOD AND BEVERAGES	\$737,024,866	\$759,778,132	+3.1%
SHOPPING	\$739,923,835	\$747,065,269	+1.0%
LODGING ACCOMMODATIONS	\$640,962,901	\$708,097,216	+10.5%
GROUND TRANSPORTATION	\$264,003,267	\$273,079,182	+3.4%
OTHER	\$483,182,908	\$509,095,979	+5.4%

Source: Davidson-Peterson Associates



OBJECTIVE TWO

INCREASE FALL VISITATION 15%

TOTAL FALL SEASON VISITATION IS UP 12% OVER 2012.

Visitors staying in paid accommodations is up 30.3% over 2012.

YEAR	TOTAL VISITATION	PAID ACCOMMODATIONS
2012	997,558	554,707
2013	1,036,814	611,894
2014	1,120,452	708,474
2015	1,117,714	723,025
2015 VS. 2012	+12%	+30%

Source: Davidson-Peterson Associates

OBJECTIVE THREE

SUPPORT 15% RevPAR INCREASE

In 2015, increases in ADR drove tremendous gains in RevPAR. In previous years, where occupancy gains were high and ADR increases smaller, the county experienced less in RevPAR growth. It appears a better balance has been achieved and signals that lodging partners are stretching visitor value.

PERCENTAGE INCREASES YOY			
2015 vs 2014	OCCUPANCY	ADR	RevPAR
Lee County, FL	7% (70.6%)	8% (\$145.01)	15% (\$102.42)
Competitive Set FL	1% (73.8%)	7% (\$176.30)	7% (\$130.62)

AT THE END OF 2012 REVPAR WAS \$71. PARTNERS HAVE ADDED MORE THAN \$31 IN REVENUE PER ROOM SINCE THEN.

Source: 2016 STR, Inc./STR Global, Ltd.

COMPETITION

- PINELLAS COUNTY, FL
- MANATEE COUNTY, FL
- COLLIER COUNTY, FL
- MONROE COUNTY, FL
- MIAMI-DADE COUNTY, FL
- BROWARD COUNTY, FL
- PALM BEACH COUNTY, FL



LODGING PERFORMANCE

SEPTEMBER
2016 YTD

PERCENTAGE INCREASES YOY			
YTD Sept. 2016 vs. YTD Sept. 2015	OCCUPANCY	ADR	RevPAR
Lee County, FL	-0.6% (71.3%)	3.3% (\$156.76)	2.6% (\$111.77)
Competitive Set FL	-1.7% (73.6%)	1.5% (\$167.60)	-0.8% (\$134.34)

As of September 2016, occupancy continues to remain flat, but ADR and RevPAR have increased gradually and at a faster rate than our competitive set.

Source: 2016 STR, Inc./STR Global, Ltd.



FISCAL YEAR RESULTS

FY2015-16
GOAL

**INCREASE YEAR-OVER-YEAR
BED-TAX REVENUE BY 4.5%**

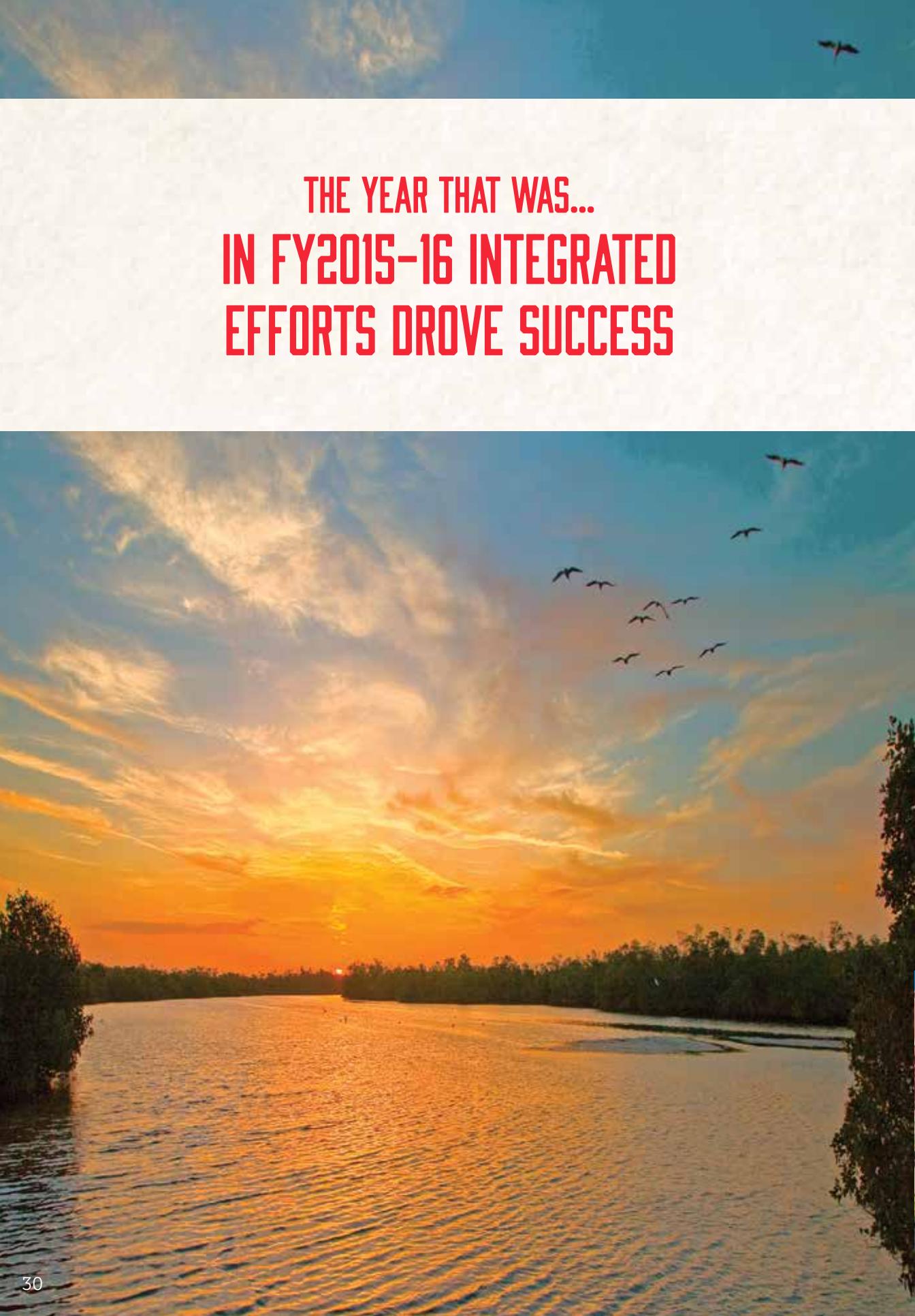
Increased spending on lodging has fueled another year of goal-breaking tourist tax collections.

OCTOBER 2015 – SEPTEMBER 2016

\$39,694,021 | UP 5% YOY

Thank you to VCB stakeholders, industry partners,
county officials and resident ambassadors
for your contribution to our combined success.

Source: Lee County Clerk of Courts



THE YEAR THAT WAS...
**IN FY2015-16 INTEGRATED
EFFORTS DROVE SUCCESS**

FY2015-16 MARKETING & PR

As the VCB Marketing, Sales and Public Relations teams strive to grow the tourism pipeline and bolster our off-season visitation, there have been a number of substantial gains made across multiple disciplines.

MARKETING

MEDIA:

More than \$1.4 million in negotiated added-value placements.

PR:

\$4 billion impressions garnered from earned media coverage.

WEBSITE:

20% of visits to FortMyers-Sanibel.com resulted in an industry partner referral.

SOCIAL:

Total engagements on Facebook and Instagram increased YOY by 271% and 216% respectively, which we attribute to increased user-generated content.

eCRM:

Increased partner referrals from email efforts to more than 31,000.

**37% OF VISITORS RECALL SEEING THE BEACHES
OF FORT MYERS & SANIBEL MARKETING**

Source: 2015 Annual Report, Davidson-Peterson Associates



NO 24

You can hear a lot with the world on silent mode.



FY2015-16 SALES

31,849 Contracted Group Room Nights – a 3% YOY increase
717 RFPs Sourced to Industry Partners – a 39% YOY increase
464 Meetings RFPs to Industry Partners – a 36% YOY increase
233 Weddings RFPs to Industry Partners – a 44% YOY increase
76% Industry Partner Response Rate – a 10% YOY increase

**GROUP TOUR AND TRAVEL TOTAL ECONOMIC IMPACT:
\$233,950 – A 56% INCREASE YOY**

FY2015-16 VISITOR SERVICES

Produced seven Team Tourism events and refreshed the Team Tourism Sales & Marketing Workshop Series to provide education about relevant tourism topics important to industry partners.

Received 943 Elaine McLaughlin Outstanding Hospitality Service Award nominations – a 48% increase YOY.

Participated in 18 Visitor Assistance Program cases involving distressed passengers and visitors.

Held 27 product education site tours throughout Lee County, attended by Volunteer Tourism Ambassadors as part of their destination training.

Collaborated with the Lee County Port Authority and U.S. Customs and Border Protection in a new partnership to train and field 26 Volunteer Tourism Ambassadors to work inside Customs for arriving international flights.

**VOLUNTEER TOURISM
AMBASSADORS WORKED
24,267 HOURS AND
ASSISTED OVER
218,700 VISITORS.**



WEBSITE INQUIRIES

BY DMA FY2015–16/
FY2014–15

Website visitation for 2015 declined due to decreases in organic search traffic. This remains an industry-wide issue as Google has shifted its algorithms and has incrementally increased its position as a destination content aggregator.

WEBSITE INQUIRIES BY DMA – PRIMARY DOMESTIC MARKETS			
Primary Domestic Markets	FY2015	FY2016	YOY % Change
Boston	64,346	58,142	-9.64%
Chicago	103,302	96,592	-6.50%
Cincinnati	25,123	22,168	-11.76%
Cleveland-Akron	36,762	33,644	-8.48%
Columbus	31,543	30,307	-3.92%
Detroit	49,109	44,789	-8.80%
Indianapolis	29,783	28,182	-5.38%
Minneapolis-St. Paul	49,649	44,607	-10.16%
New York	154,537	136,821	-11.46%
St. Louis	26,039	25,092	-3.64%
Washington, D.C.	58,867	54,811	-6.77%

WEBSITE INQUIRIES

BY DMA FY2015–16/
FY2014–15

WEBSITE INQUIRIES BY DMA – SECONDARY DOMESTIC MARKETS			
Secondary Domestic Markets	FY2015	FY2016	YOY % Change
Atlanta	43,530	40,180	-7.70%
Albany	10,640	8,150	-23.50%
Baltimore	21,832	15,353	-29.68%
Dallas	34,765	32,902	-5.36%
Green Bay	8,203	6,783	-17.31%
Greensboro	5,983	4,983	-16.71%
Houston	30,573	30,291	-0.93%
Louisville	13,987	10,864	-22.33%
Nashville	18,221	17,504	-3.94%
Philadelphia	52,297	45,614	-12.78%
San Antonio	7,120	7,562	6.21%

Source: Google Analytics



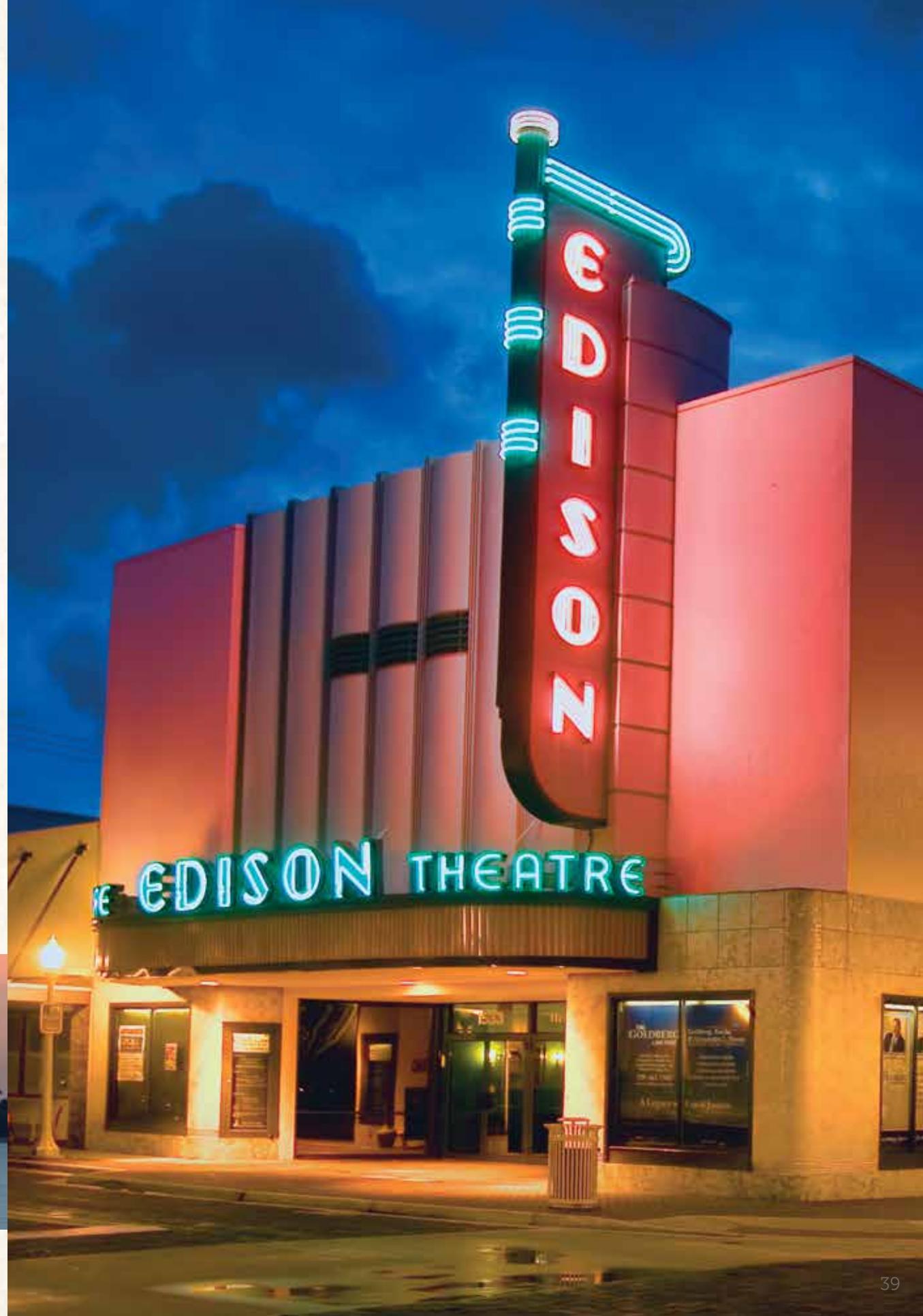
WEBSITE INQUIRIES FROM FLORIDA TARGET MARKETS

Decreases from in-state markets mirror out-of-state trends.

WEBSITE INQUIRIES FROM FLORIDA TARGET MARKETS			
Florida Market	FY2015 Visits	FY2016 Visits	YOY % Change
Tampa-St. Petersburg (Sarasota)	87,853	80,861	-7.96%
Miami-Ft. Lauderdale	90,403	88,646	-1.94%
Orlando-Daytona Beach-Melbourne	75,855	70,780	-6.69%
West Palm Beach-Ft. Pierce	24,808	23,788	-4.11%

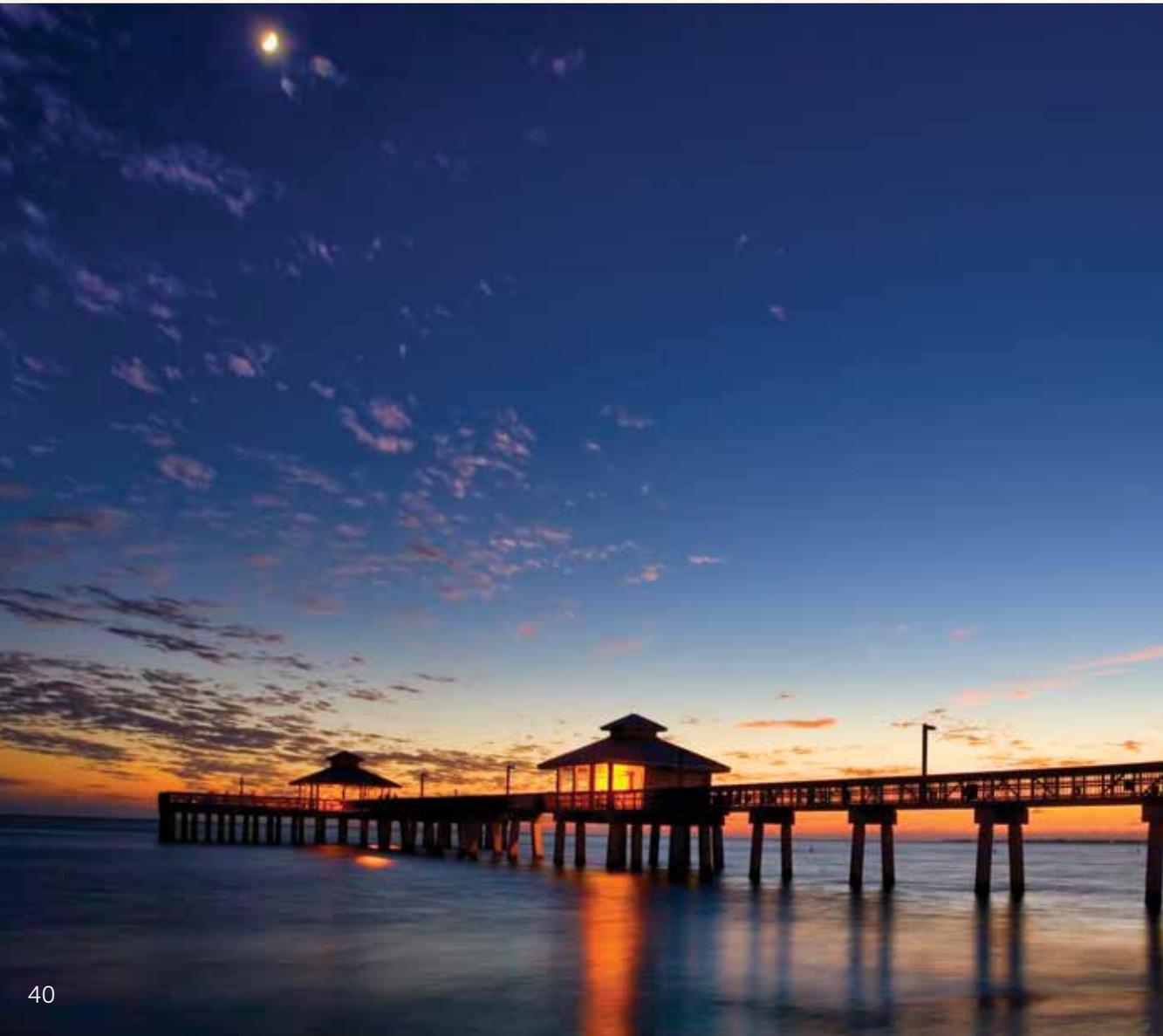
Source: Google Analytics: FY2015-16 over FY2014-15

8.7% DECREASE IN WEBSITE VISITS FROM IN-STATE MARKETS



2015 MARKET OBSERVATIONS

- MARKET CONTRIBUTION BY SEASON (DOMESTIC VS. INTERNATIONAL)
- AVERAGE VISITOR AT-A-GLANCE
- LODGING PREFERENCES / SHIFTS



SEASONAL VISITATION

BY SOURCE MARKETS

OBSERVATIONS:

- Contributions from all markets are much more balanced year round than in the past.
- Increases in international visitation have buoyed a somewhat flat domestic response.
- Total expenditures on paid accommodations increased by 8.3% due to increased international visitation.

SEASONAL VISITATION BY SOURCE MARKETS				
2015	Fall	Winter	Spring	Summer
YOY Seasonal Increases of Visitors Staying in Paid Accommodations	+2.1%	0%	-4.9%	+5%
Visitor Distribution by Season (YOY Change)				
Domestic Visitors	62% (+3%)	81% (-4%)	69% (-2%)	68% (+4%)
International Visitors	33% (+11%)	26% (+22%)	24% (-17%)	16% (+8%)
Florida Visitors	5% (-4%)	3% (+36%)	9% (+52%)	6% (+6%)

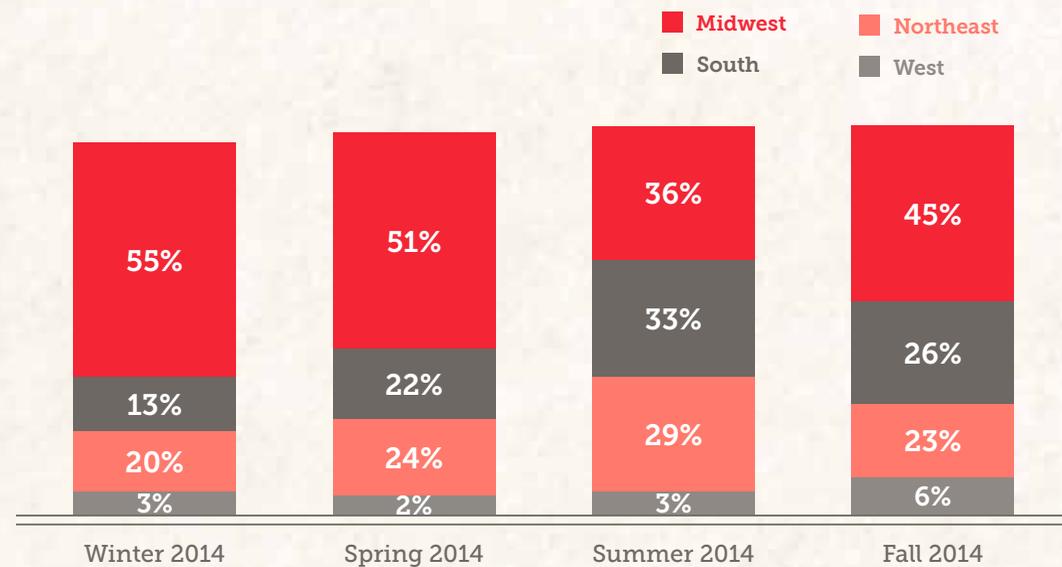
Source: 2015 Annual Report, Davidson-Peterson Associates



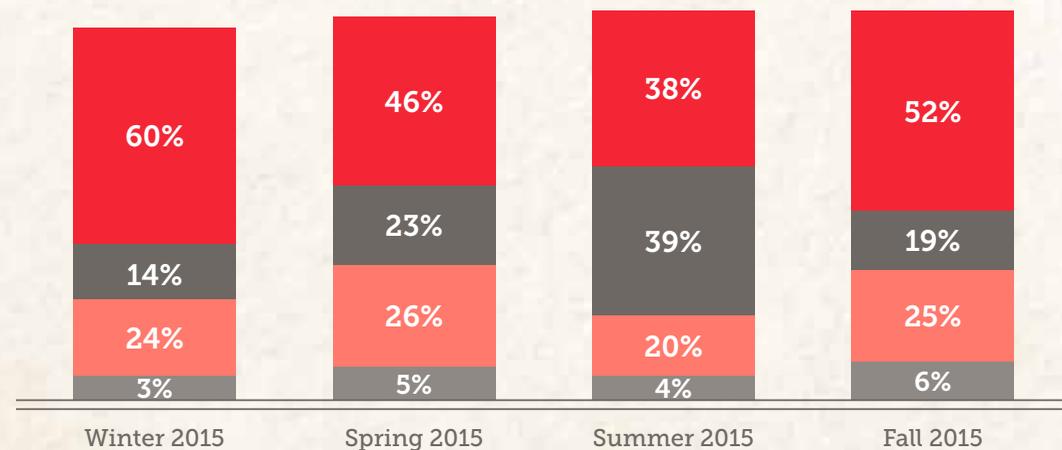
VISITOR ORIGIN | % BY US REGIONS

Visitation patterns change seasonally and our marketing strategy is aligned to support these trends. The West has been a predominantly weak market with little marketing support. The Midwest and Northeast are targets year-round. Focus is amplified in-state (South) during summer.

Midwest markets took a bigger share YOY in the fall, but came in lower in the spring as other sources took more share. The Northeast lost some of the share it gained last year as the South picked up strength.



Source: 2014 Annual Report, Davidson-Peterson Associates



Source: 2015 Annual Report, Davidson-Peterson Associates

VISITOR ORIGIN | % BY CITY

In 2015 the top markets sending visitors to our destination shifted slightly, with Boston making the biggest move from 5th to 2nd in contribution. The difference between 1st and 3rd is less than .2%. Beyond that, most others remained close to their 2014 rank. This consistency year-to-year is indicative of our marketing investment in these markets.

VISITOR ORIGIN – CITY			
City	2015 Rank	2014 Rank	YOY Growth
Minneapolis-Saint Paul	1	3	5.9%
Boston (Manchester, NH)	2	5	5.8%
New York	3	1	5.7%
Chicago	4	2	4.9%
Indianapolis	5	4	4.9%
Cleveland-Akron (Canton)	6	7	3.6%
Detroit	7	6	3.5%
Columbus, OH	8	10	3.4%
Philadelphia	9	8	2.7%
Cincinnati	10	9	2.6%

Source: 2015 Annual Report, Davidson-Peterson Associates

MINNEAPOLIS EDGED OUT BOSTON AND NEW YORK FOR THE TOP SPOT.

2015 VISITOR ORIGIN

% BY COUNTRY

2015 was another banner year for international market growth. Germany continues to be the top provider, with the UK showing the fastest expansion. Unfortunately, other international sources are down. Focused expansion into new European markets is in the plan for FY2016–17.

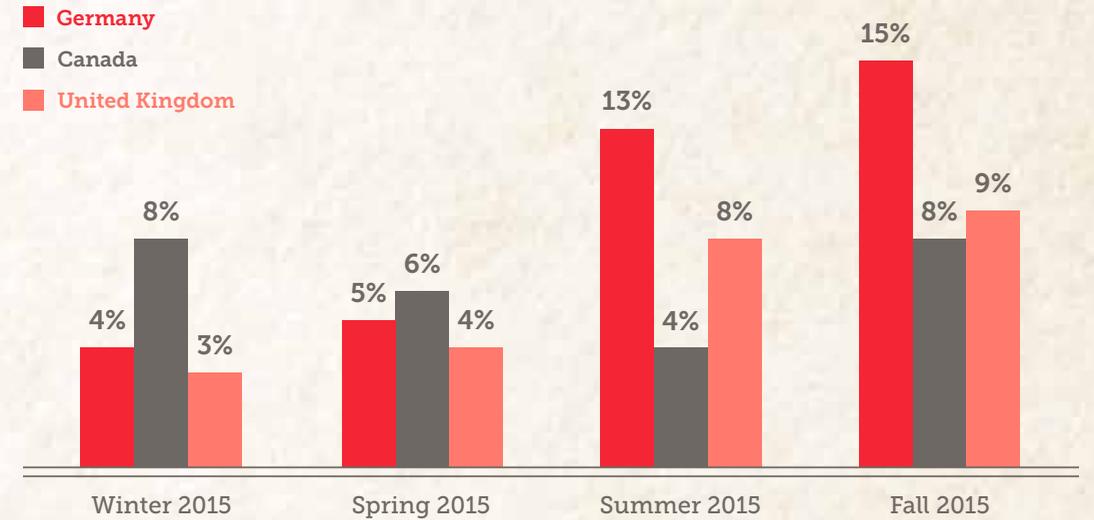
VISITORS STAYING IN PAID ACCOMMODATIONS					
Country of Origin	%		Visitor Estimates		% change
	2014	2015	2014	2015	
United States	76%	74%	2,279,842	2,240,688	-1.7%
Germany	8%	9%	250,055	272,590	9.0%
Canada	6%	6%	176,059	196,265	11.5%
UK	5%	6%	139,061	177,183	27.4%
Other International	6%	5%	170,956	136,295	-20.3%

Source: 2015 Annual Report, Davidson-Peterson Associates

INTERNATIONAL VISITOR ORIGIN

% BY COUNTRY

% OF PAID ACCOMMODATIONS VISITORS



Source: 2015 Annual Report, Davidson-Peterson Associates



52% OF INTERNATIONAL VISITORS WERE COMING FOR THE FIRST TIME [9% MORE THAN 2014].

AVERAGE VISITOR AT-A-GLANCE

Driving bookings among the next generation of travelers is a major focus for FY2016-17. Programs will become more dynamic across all marketing channels.

2015 AVERAGES:

- 52 years of age
- \$99,900 household income
- 74% married
- 44% traveling as a couple
- 31% traveling as a family
- 14% traveling as a group
- 3 people in travel party
- 31% first-time visitors

KEY OBSERVATIONS:

- Average age maintains against 2014
- Incomes decline (~\$7,000)
- 3% more couples, 3% fewer families
- 3% increase in first-timers

SEASONAL HIGHLIGHTS

	Season	Value
Highest Average Income	Winter 2015	\$101,053
Lowest Average Age	Summer 2015	48 years
Most Families	Summer 2015	38%
Most First-timers	Summer 2015	37%
Most Repeaters	Fall 2015	73%
Most Couples	Winter 2015	49%

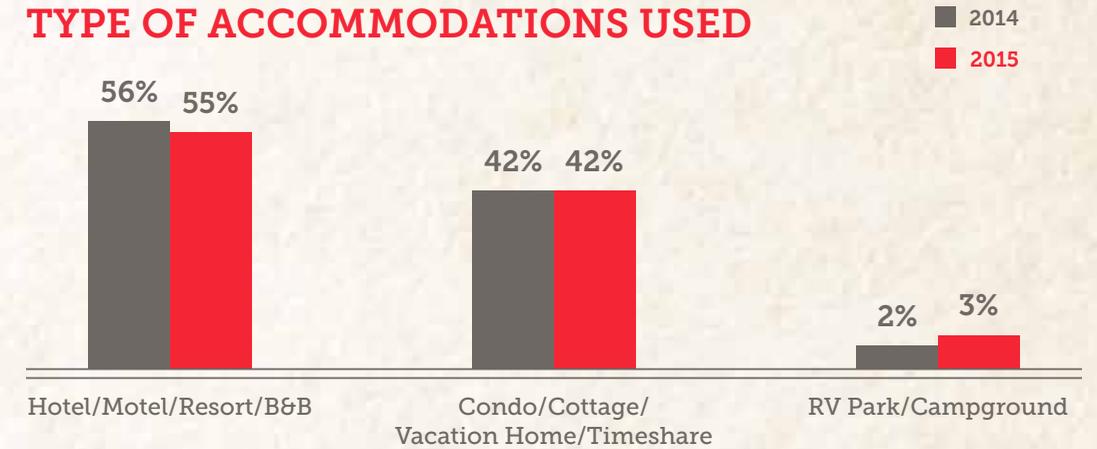
Source: 2015 Annual Report, Davidson-Peterson Associates

2015 LODGING PERFORMANCE

BY TYPE

According to DPA surveys, the types of accommodations used by visitors have remained consistent year over year.

TYPE OF ACCOMMODATIONS USED



Though usage of Hotel/Motel/Resort product holds constant between years, all types of providers were able to increase RevPAR by double digits. This speaks to smart revenue management strategies that leveraged consumer price tolerances.

HOTEL REVPAR BY SEGMENT

	RevPAR	YOY % Change
Fort Myers, FL Luxury	\$187.30	11.3%
Fort Myers, FL Upscale	\$136.86	14.4%
Fort Myers, FL Midprice	\$89.13	17.3%
Fort Myers, FL Economy	\$67.99	15.3%
Fort Myers, FL Budget	\$48.51	21.5%

Source: 2015 Annual Report, Davidson-Peterson Associates; 2016 STR, Inc./STR Global, Ltd.

FY2015-16 GOAL RESULTS

	FY2015-16 Goals	Source	FY2015-16 Results
Overarching			
Bed Tax	Increase bed tax receipts by 4.5%	Audited Returns	+ 5%
Out-of-State Domestic Visitation	Increase out-of-state visitation in paid accommodations by 2% (Reported Quarterly)	Visitor Intercept Survey	- 4.7%
In-State Visitation	Increase in-state visitation in paid accommodations by 2% (Reported Quarterly)	Visitor Intercept Survey	- 8%
International Visitation	Maintain international visitation in paid accommodations (Reported Quarterly)	Visitor Intercept Survey	+ 12%
Length of Stay	Increase length of stay to 4.8 days	Visitor Intercept Survey	4.74 Days
Visitor Recall	Maintain 30% or higher recall of destination advertising	Visitor Intercept Survey	37% Visitor Recall
Paid Media			
Impressions	Deliver 700,000,000 impressions across media	Ad Services	682,741,916 Impressions
Total Inquiries	Deliver 7,500,000 total inquiry as defined as site visits, rich media interactions and content partnership	Google Analytics / Double Click	17,409,359 Inquiries
Total Leads	Deliver 325,000 leads	Google Analytics	249,672 Leads
CPM	Maintain an average Cost per Thousand Impressions at or below industry standards (\$8)	Contracts	\$9.38 CPI
Added-Value Placements	Negotiate 1,350,000 in added-value placements	Contracts	\$1,410,732
Social Media			
Facebook Fans	Increase Facebook likes by 130,000	Facebook	82,572
Twitter Followers	Increase Twitter followers by 5,000	Twitter	15,123
Instagram Followers	Increase Instagram followers by 5,000	Instagram	10,578
Website Referrals	Generate 60,000 social media website referrals to partners	Google Analytics	86,317
Facebook guidebook requests	Increase to 4% conversion	Google Analytics	45.2%
Facebook eNews Sign Ups	Increase to 6.8%	Google Analytics	14.0%
Twitter guidebook requests	Increase to 3% conversion	Google Analytics	10.1%
Twitter eNews Sign Ups	Increase to 2.5% conversion	Google Analytics	2.62%

FY2015-16 GOAL RESULTS

	FY2015-16 Goals	Source	FY2015-16 Results
Website			
Average Pages/Visit	Average 2.5 pages viewed per use. This takes into account general and promotional traffic	Google Analytics	Avg 2.19 pages per session
Guidebook Conversion	1.5% of total website visitors request or view guidebook	Google Analytics	1.5% of total website visitors have requested or viewed guidebook
eNews Sign Ups	Capture 25,000 email opt-ins	Google Analytics	52,847 email opt-ins
Average Visit Duration	Average time spent on site 2:30	Google Analytics	Avg time spent 2:03
Lodging Partner Referrals	15% of visits to include a referral to a partner site	Google Analytics	20.5% of visits include a referral to a partner site
eCRM			
Website Leads			
Unique Open Rate	Increase open rate to 24%	Exact Target / Google Analytics	22%
Click-to-Open	Increase click-to-open rate to 23%	Exact Target / Google Analytics	19%
Reader Service Leads			
Unique Open Rate	Maintain open rate at 16%	Exact Target / Google Analytics	16%
Click-to-Open	Increase click-to-open rate to 17%	Exact Target / Google Analytics	13%
Digital Lead Generation Leads			
Unique Open Rate	Increase open rate to 8%	Exact Target / Google Analytics	9%
Click-to-Open	Maintain click-to-open rate at 15%	Exact Target / Google Analytics	11%
All Leads			
Partner Referrals	Increase partner referrals to 30,000	Exact Target / Google Analytics	31,554
Guidebook Requests	Increase guidebook requests to 5,000	Exact Target / Google Analytics	1,071
Product Development			
Event Development	Increase Island Hopper Songwriter Fest attendance and room night generations by 10%	Events/Venues	+11% attendance, +8% room nights
Attractions Marketing	Increase media placements & applicants by 5%	Applications	+8% applicants

FY2015-16 GOAL RESULTS

	FY2015-16 Goals	Source	FY2015-16 Results
Industry Relations			
Guests First Training	1,500 participants and 150 CGSPs	Guests First	1,429 participants and 158 CGSPs
Team Tourism Events	2,200 participants at Team Tourism Education Sessions	Team Tourism	7 events produced; 1000 attendees (Travel Rally cancelled due to severe weather)
Award Recognition	Improve the quality of the nominations	E-Awards / Chrysalis	943 nominations E-Awards, 55 nominations Chrysalis
Tourism Ambassadors	Recruit and train 1 student intern and 10 local residents as volunteer Tourism Ambassadors	Visitor Services	3 FGCU interns trained; 12 new volunteers recruited
Media Relations			
Media Impressions	Increase impressions by 10%	Vocus and any other monitoring services	4,037,701,989 (+35%)
Group and Individual Media FAMS	Increase the number of group and individual media tours hosted for a total of 20	VCB Count	110
Media Interview/Desksides (media tours, phone or email interviews, events outside of destination)	Increase the number of media engagements by 35% (45 desksides/media engagements)	VCB Count	276
Sales - International & Domestic Leisure			
Meeting/Conference Conversion	Increase leads converted to definite business by 4%	VCB Count	+3.1%
Meeting Leads	Increase leads generated by VCB by 4%	VCB Count	+39.7%
FAM Trips	Increase to a minimum of 17 FAMs	VCB Count	18
Client Events	Increase to a minimum of 21 client events	VCB Count	26
Wedding Leads	Produce 200 wedding leads	VCB Count	233

INSIGHTS & OPPORTUNITIES

- Growth in shoulder seasons of fall and winter has been driven by strong response from Midwestern markets. Such response begets increased efforts and extension into new markets within the region.
- International markets continue to strengthen. Focus will remain strong in the primary feeders, and as we go forward, we'll be exploring options to build demand within additional markets, primarily Scandinavian countries.
- Lodging preferences are shifting among visitors, but all segments are continuing to enjoy growth. Budget and Midprice categories have experienced the strongest growth in RevPAR while all gained an average of 4% in incremental occupancy YOY.
- Though the volume of total visitors was not up YOY, the volume of visitors staying in paid accommodations was. The decline comes from those visiting friends and family. This is the second year our destination has experienced this decline. A focused study on the VFR segment will be conducted to understand what experiential or financial factors are driving this change.
- As consumers continue to seek and consume travel information in an ever-evolving digital landscape, the programs and assets we deploy need to evolve as well. Increasing the use of rich content and interactive media, along with more video, is the key to finding and engaging potential visitors. Of course, this strategy may result in less visits to our website, but it will also expand our reach and work to build interest in the expanding ecosystem.



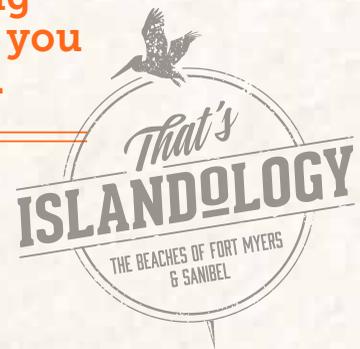
A serene sunset scene over a body of water. The sun is a bright, glowing orb in the center of the frame, partially obscured by a line of dark, silhouetted trees. The sky is a gradient of warm colors, from deep orange near the horizon to a lighter, hazy yellow at the top. The water in the foreground is calm, reflecting the colors of the sky and the sun. A single swan is swimming in the middle ground, its dark silhouette contrasting with the shimmering water. In the lower foreground, the silhouettes of various plants, including what appears to be a palm frond, are visible against the bright sky. The overall mood is peaceful and contemplative.

THE ROAD AHEAD

2016-17

NO 26

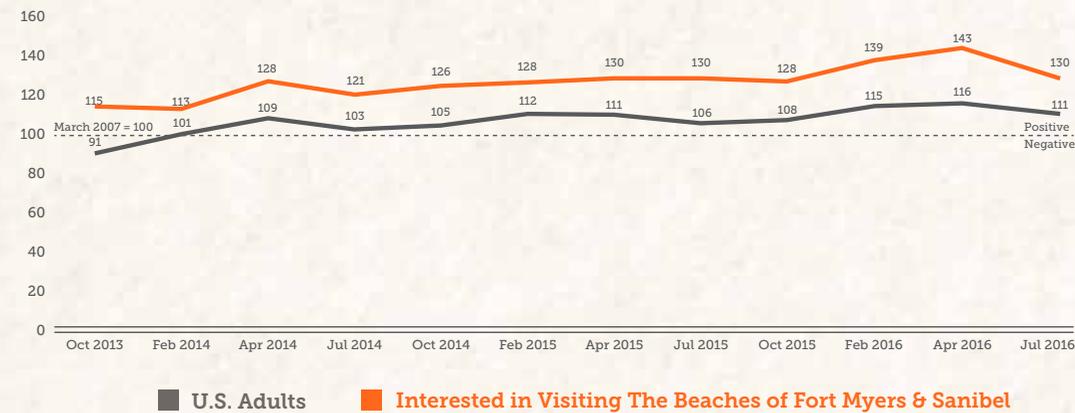
The best fishing stories start with you getting away.



LOOKING FORWARD

According to the most recent MMGY Global *travelhorizons*™ survey conducted during the third quarter of 2016, the overall Traveler Sentiment Index (TSI) now stands at 111, a 5-point decrease over the previous quarter but a 5-point increase over the comparable period last year.

The overall TSI is derived from the following six variables: interest in travel, time for travel, personal finances available for travel, affordability of travel, quality of service, and safety of travel. For all travelers, the main driver of sentiment decline is perceived safety of travel.

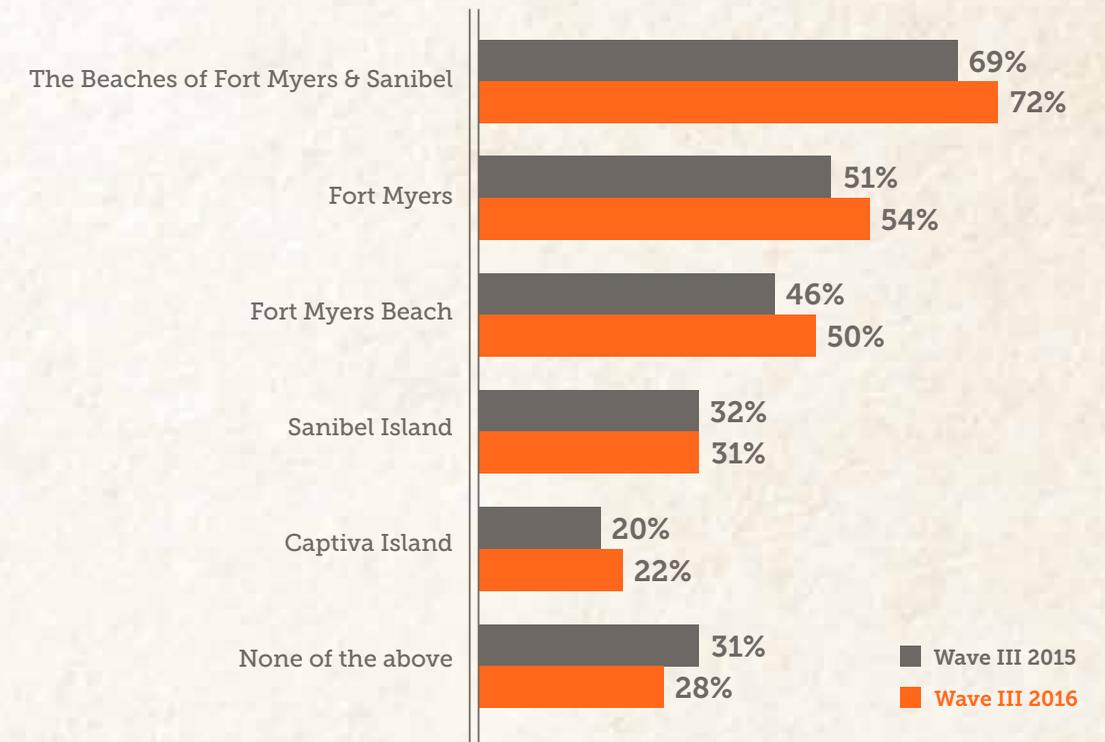


Source: MMGY Global, *travelhorizons*™, Wave III 2016

SENTIMENT FOR THOSE INTERESTED IN VISITING LEE COUNTY REMAINS VERY HIGH AT 130, BUT IS DOWN SLIGHTLY FROM ITS PEAK OF 143 THIS SPRING.

DESTINATION AWARENESS

Among those surveyed in Wave III of the 2016 *travelhorizons*™, 72% cite having awareness of The Beaches of Fort Myers & Sanibel. This is 3 points higher than Wave III 2015. Fort Myers and Fort Myers Beach also earned statistically significant increases among respondents.



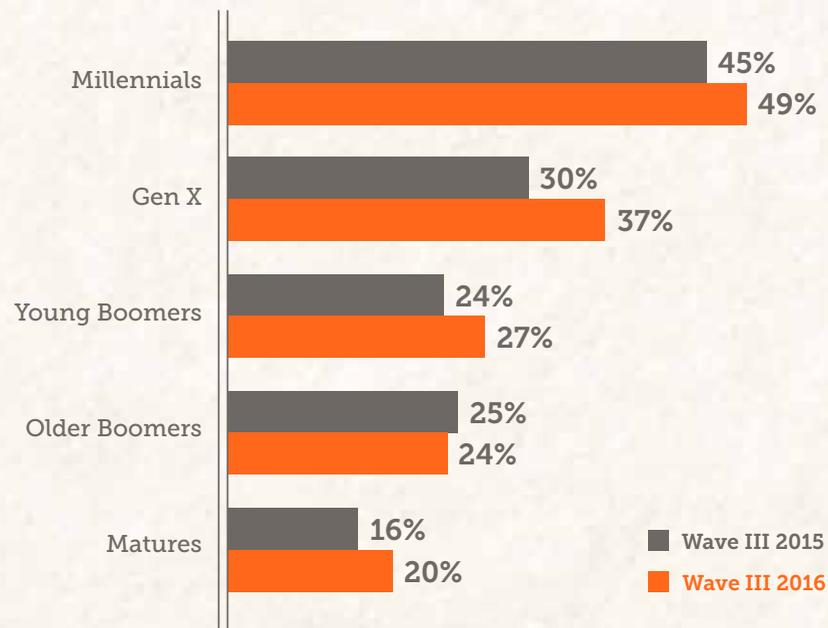
Source: MMGY Global, *travelhorizons*™, Wave III 2016



EXTREMELY / VERY INTERESTED IN VISITING

BY GENERATION

The Wave III study of *travelhorizons*™ runs annually in August. In the 2016 results, we've observed that interest in visiting Lee County in 2016-17 continues to be strong among younger generations. Among all generations, interest among GenX grew the most. This bodes well for our destination and its need to cultivate new generations into repeat visitors.



Source: MMGY Global, *travelhorizons*™, Wave III 2016

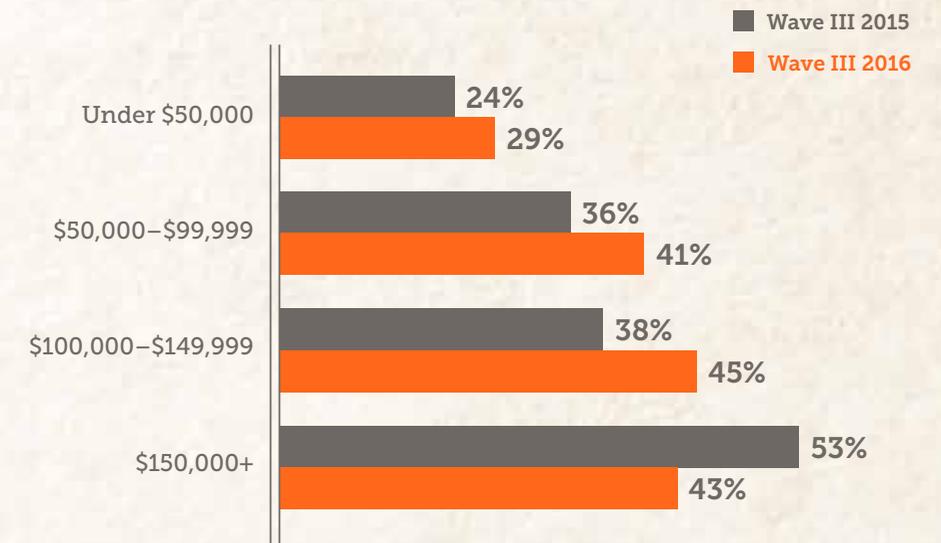
GENERATIONAL GROUPS:

Millennials	Born 1980 or later
Gen X	Born 1965 - 1979
Young Boomers	Born 1955 - 1964
Older Boomers	Born 1946 - 1954
Matures	Born 1945 or earlier

EXTREMELY / VERY INTERESTED IN VISITING

BY INCOME

Among those extremely / very interested in visiting, the greatest increase came from those in the \$100k-\$149k range of household income. As we know from the DPA study, our average visitor income is around \$100k.



Source: MMGY Global, *travelhorizons*™, Wave III 2016



DATA DRIVES DECISIONS

There is truth in the numbers. It's our job to find it and to act on it. As the travel marketplace continues to evolve and consumer demand remains high, we continue to focus and refine our marketing efforts. A key to this refinement is being smarter with activating the data we have at our disposal. One way to do this is to leverage third-party resources in the development of more precise audience targets. These targets are defined by much more than geography and demographics, but by behaviors and interests that align with our destination.

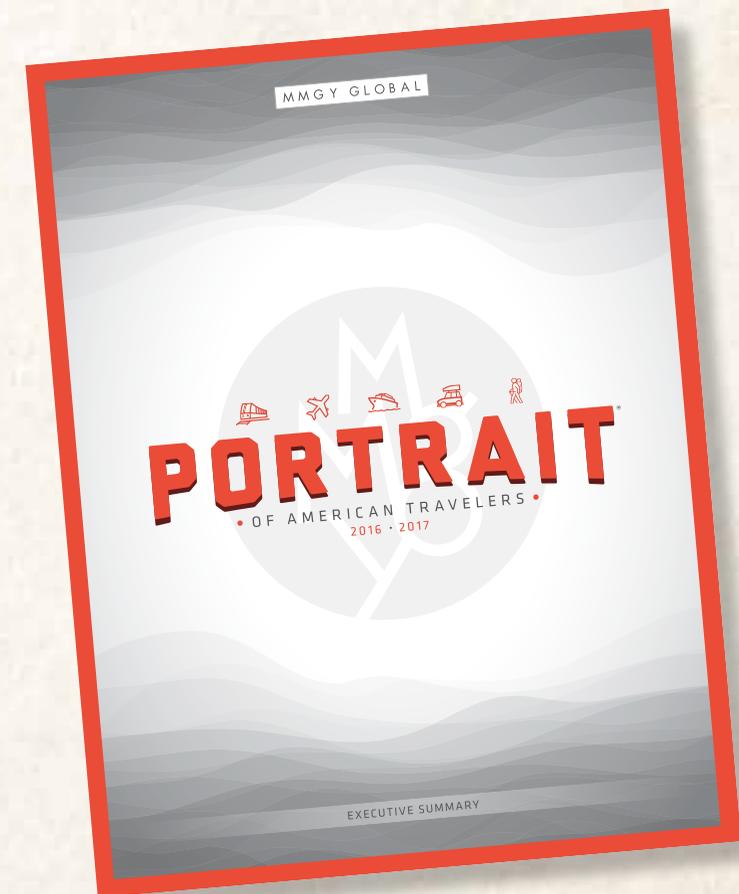
This is where the future of marketing is.



PORTRAIT OF AMERICAN TRAVELERS

The most comprehensive analysis of the emerging travel habits, preferences and intentions of Americans, conducted annually.

- 26th year
- 2,832 respondents
- Conducted February 2016
- \$50,000+ annual HH income Active vacationers (took at least one overnight vacation at least 75 miles from home during the past 12 months)
- Data evaluated for traveler persona development drawn from research subset





METHODOLOGY

Utilizing data from the Portrait survey, we specifically analyzed more than 400 variables, including travel-related attitudes, behaviors, preferences, social values, lifestyles and media habits of leisure travelers who have identified themselves as "Interested in Visiting Lee County" (39% of active leisure travelers).

For purposes of positioning Lee County more specifically inline with the interests and behaviors of travelers, we've utilized a subset of this group to define three specific target segments who are motivated to travel to beach destinations and enjoy a mix of relevant activities.

	Total Leisure Travelers	Interested in Visiting Lee County
2016 Portrait of American Traveler®	2951	1157

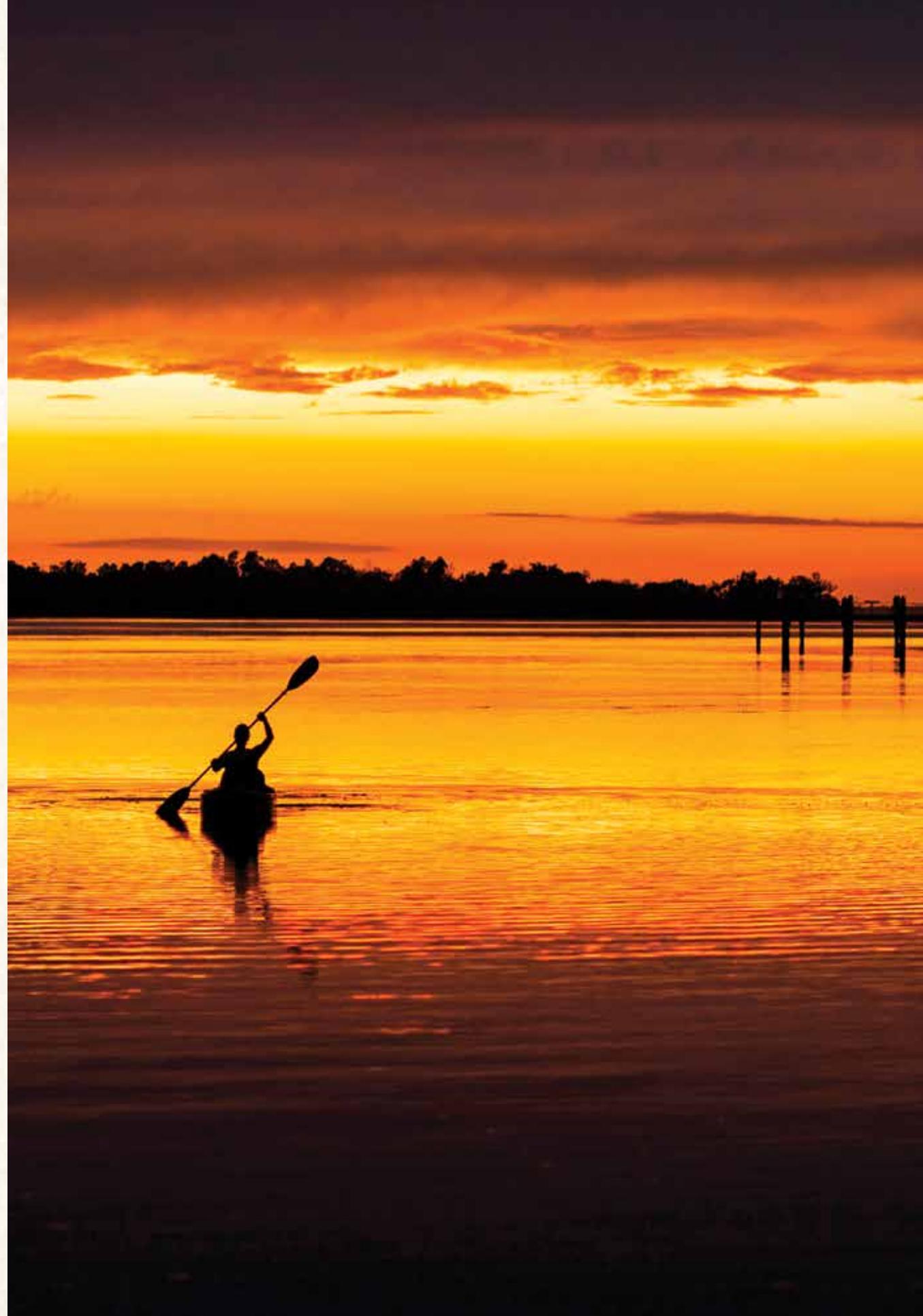
Source: 2016 Portrait of American Travelers®

39%
INTERESTED IN VISITING

UP 6%

NO 36

For a slower pace,
add water.



PRIMARY AUDIENCE PROFILES

Of those interested in visiting within the next two years, there are three distinct segments, or personas, to evaluate. Personas are derived from the Portrait data based on two criteria:

- 1: Respondent cites a beach experience as a desirable attribute of vacation.
- 2: Respondent cites another form of water-based activity as a desirable vacation attribute. (Swimming, Snorkeling, Fishing, Boating, etc.)

Target personas are selected based on future travel intent, demographics, vacation spending projections, and general travel desires that align with the Lee County product.



WILLIAMS R. ABLE

ACTIVE, AFFLUENT FAMILIES

GOING FOR IT

ACTIVE, NO KIDS

FREE BIRDS

ACTIVE, EMPTY NEST

PRIMARY AUDIENCE PROFILES



WILLIAMS R. ABLE

ACTIVE, AFFLUENT FAMILIES

Cooperative
Decision-Makers
Between 30 and 51
16% Hispanic
92% Married
86% Full-time Employed
52% Graduate School Degrees
\$125k+ HHI

GOING FOR IT

ACTIVE, NO KIDS

Primarily Male
Decision-Makers
Between 25 and 39
\$75k+ HHI
28% Nonwhite
61% Unmarried
71% Full-time Employed
33% Graduate School Degrees

FREE BIRDS

ACTIVE, EMPTY NEST

Primarily Female
Decision-Makers
\$100k+ HHI
Between 55 and 65
43% Grandparents
82% Married
41% Part-timers or Retired
42% Graduate degrees

Source: 2016 Portrait of American Travelers®, Travelers interested in visiting Fort Myers/Sanibel Island in the next 12 months.



EXPERIAN

MARKETING SERVICES

In addition to MMGY Portrait data, we also leveraged a new relationship with the data bureau Experian to analyze and model customer data collected from visitor guide requests. Conducted in July 2016, 175,000 matched records were found within the Experian Consumer View database.

- Utilized current CRM and guidebook customer base to statistically model audience and develop addressable personas.
- Exposed sub-segments within primary audience groups, leading to enhanced targeting and messaging.



EXAMPLE AUDIENCE

BEHAVIORAL PROFILES

Utilizing the Experian models we have identified three additional segments that have significant propensity to be, or become, Lee County visitors. These segments are not defined by standard demographics but by behavior and affinities uncovered during segmentation.



FIDO-IN-TOW

48% of our best visitors own a dog and make significant investments in pet supplies. Messaging will be aligned to this segment, especially within Florida and Southern drive markets.

COUNTRY STREAMERS

Our visitors are avid music connoisseurs who index highest for country and rock genres enjoyed via streaming platforms. Partnerships and co-marketing with digital radio partners is a sound investment.

FLOWERS & CHARDONNAY

Association with gardening and wine cultures is high among our audience. Content and promotions with these elements are sure to draw their attention.



OPPORTUNITY ASSESSMENT

Our destination continues to enjoy high levels of awareness within our target markets. This awareness has shifted to consideration and conversion at a steady pace over the last few years and all indicators point to future positive trends. This is great news for the health of our tourism economy.

CONSIDERATIONS:

1. VFR visitation has been in decline for a number of years now. It is time to execute a special study to figure out why. Has our destination become too "touristy"? Are the demographics of resident families shifting? Has an improving economy allowed more residents to travel outbound as opposed to bringing friends in?
2. Lodging product within the mid-to-economy scale is experiencing high demand. Understanding whether this is an outcome of availability or customer preference is important, i.e., are buy-downs happening because higher-end product is unavailable?
3. Utilizing additional sources of data will continue to enable us to be more focused and granular in our marketing efforts. This granularity will empower us to continue building market share and driving growth.



KEY TARGET MARKET DETAIL

FY
2016-17

PRIMARY SECONDARY

Traditional & Digital Advertising
Digital Only

PRIMARY DOMESTIC:

Boston, Chicago, Cincinnati, Cleveland, Columbus, Detroit, Indianapolis, Milwaukee, Minneapolis, New York, St. Louis, Washington, D.C.

PRIMARY IN-STATE:

Miami-Fort Lauderdale, Orlando, Tampa-St.Pete, West Palm Beach

PRIMARY INTERNATIONAL:

Canada, Germany, Scandinavia (Sweden, Denmark), United Kingdom

SECONDARY DOMESTIC:

Albany, Atlanta, Baltimore, Dallas, Denver, Green Bay, Greensboro, Houston, Louisville, Nashville, Philadelphia, Pittsburgh, San Antonio

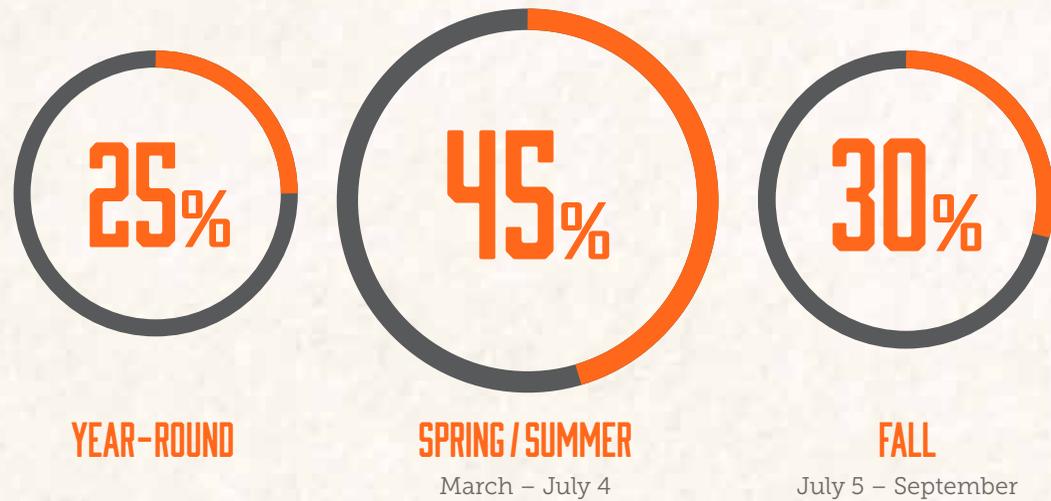
SECONDARY INTERNATIONAL:

Benelux (Belgium, Netherlands, Luxembourg), Scandinavia (Norway, Finland), Switzerland, Austria, Ireland, France

NEW PRIMARY DOMESTIC MARKET: MILWAUKEE

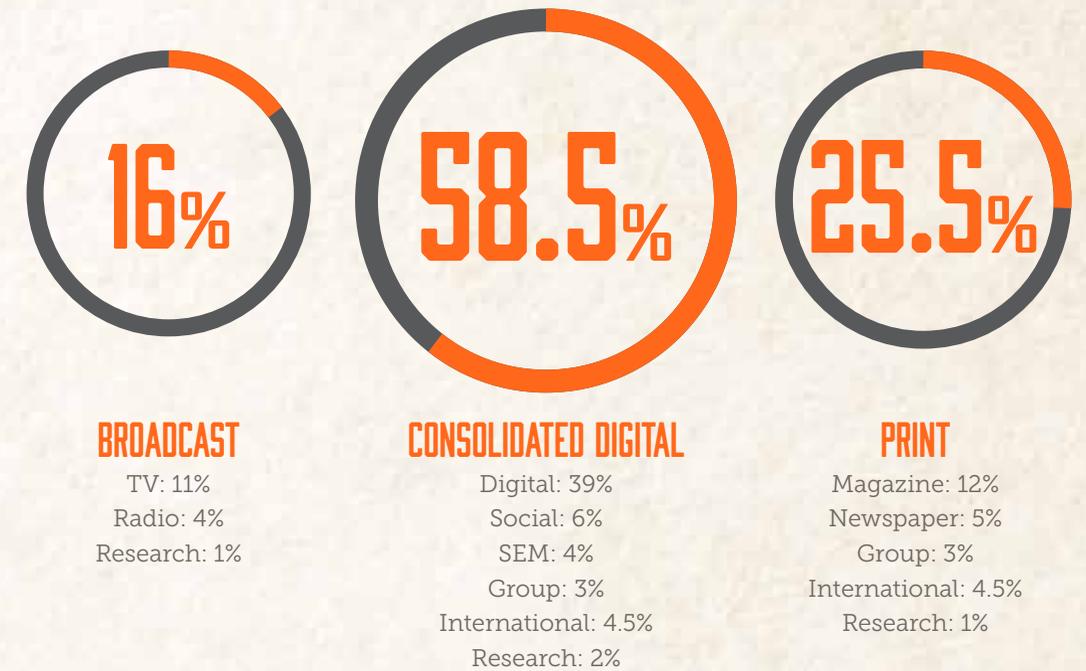
FY2016-17 SEASONALITY

MARKETING EXPENDITURES FOR FY2016-17 WILL BE ALLOCATED AS FOLLOWS:



FY2016-17 BUDGET ALLOCATION

MARKETING EXPENDITURES FOR FY2016-17 WILL BE ALLOCATED AS FOLLOWS:



FY2016-17 GOALS

FY2016-17 Goals		Source
Overarching		
Bed Tax	Increase bed tax receipts by 2.5%	Audited Returns
Out-of-State Domestic Visitation	Maintain out-of-state visitation in paid accommodations	Visitor Intercept Survey
In-State Visitation	Maintain in-state visitation in paid accommodations	Visitor Intercept Survey
International Visitation	Maintain international visitation in paid accommodations	Visitor Intercept Survey
Length of Stay	Increase length of stay to 4.8 days	Visitor Intercept Survey
Visitor Recall	Maintain 30% or higher recall of destination advertising	Visitor Intercept Survey
Paid Media		
Impressions	Deliver 625,000,000 impressions across media	Ad Services
Total Inquiries	Deliver 13,000,000 total inquiry as defined as site visits, rich media interactions and content partnership	Google Analytics / Double Click
Total Leads	Deliver 250,000 leads	Google Analytics
CPM	Deliver Cost per Thousand Impressions at or below \$14	Contracts
Added-Value Placements	Negotiate \$2,000,000 in added-value placements	Contracts
Social Media		
Facebook Fans	Increase FB likes by 35,000	Facebook
Twitter Followers	Increase Twitter followers by 10,000	Twitter
Instagram Followers	Increase Instagram followers by 10,000	Instagram
Website Referrals	Generate 75,000 referrals to website	Google Analytics
Total Social Media Engagements (New)	2,500,000 total engagements	Facebook, Twitter, Instagram
Total Social Impressions (New)	100,000,000 total impressions	Facebook, Twitter

FY2016-17 GOALS

FY2016-17 Goals		Source
Website		
Average Pages/Visit	Average 2.5 pages viewed per use. This takes into account general and promotional traffic	Google Analytics
Guidebook Conversion	1.5% of total website visitors request or view guidebook	Google Analytics
eNews Sign Ups	Capture 50,000 email opt-ins	Google Analytics
Average Visit Duration	Average time spent on site 2:30	Google Analytics
Lodging Partner Referrals	15% of visits to include a referral to a partner site	Google Analytics
eCRM		
Website Leads		
Unique Open Rate	Increase open rate to 24%	Exact Target / Google Analytics
Click-to-Open	Increase click-to-open rate to 23%	Exact Target / Google Analytics
Reader Service Leads		
Unique Open Rate	Maintain open rate at 16%	Exact Target / Google Analytics
Click-to-Open	Increase click-to-open rate to 17%	Exact Target / Google Analytics
Digital Lead Generation Leads		
Unique Open Rate	Maintain open rate to 9%	Exact Target / Google Analytics
Click-to-Open	Increase click-to-open rate at 15%	Exact Target / Google Analytics
All Leads		
Partner Referrals	Increase partner referrals to 32,000	Exact Target / Google Analytics
Guidebook Requests	Increase guidebook requests and virtual guidebook views to 5,000	Exact Target / Google Analytics
Product Development		
Event Development	5% increase in room night generations and media placements for IHSF, TDC funded events	Events/Venues
Attractions Marketing	Maintain number of applicants, strengthen criteria and reporting for 10% increase in attraction visitation	Applications/Reports

FY2016-17 GOALS

FY2016-17 Goals		Source
Industry Relations		
Guests First Training	1,650 participants and 185 CGSPs	Guests First
Team Tourism Events	Produce 7 events to enhance partner education and engagement	Team Tourism
Award Recognition	Encourage 1,000 total nominations	E-Awards / Chrysalis
Tourism Ambassadors	Recruit and train 1 student intern and 5 local residents as volunteer Tourism Ambassadors	Visitor Services
Media Relations		
Media Impressions	Increase domestic and international impressions by 5%.	Vocus and any other monitoring services
Group and Individual Media FAMS	Increase the number of group and individual media tours hosted for a total of 120.	VCB Count
Media Interview/Desksides (media tours, phone or email interviews, events outside of destination)	Increase the number of media engagements to 300.	VCB Count
Sales - International & Domestic Leisure		
Meeting/Conference Conversion	Grow qualified sales leads by 4%	VCB Count
Meeting Leads	Increase leads generated by VCB by 5%	VCB Count
FAM Trips	Host 125 Travel Professionals	VCB Count
Client Events	Increase to a minimum of 25 client events	VCB Count
Wedding Leads	Produce 225 wedding leads	VCB Count

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