



REQUEST FOR PROPOSALS #2026-51

FOR

COLLATERAL FULFILLMENT AND STORAGE SERVICES

BOARD OF COUNTY COMMISSIONERS

CRAIG ROBERTS, Chair
PAUL SAVAS, Commissioner
MARTHA SCHRADER, Commissioner
BEN WEST, Commissioner
DIANA HELM, Commissioner

Gary Schmidt
County Administrator

Contract Analyst

PROPOSAL CLOSING DATE, TIME AND LOCATION

DATE: July 14, 2026

TIME: 2:00 PM, Pacific Time

PLACE: <https://bidlocker.us/a/clackamascounty/BidLocker>

SCHEDULE

Request for Proposals Issued.....	June 15, 2026
Protest of Specifications Deadline.....	June 22, 2026, 5:00 PM, Pacific Time
Deadline to Submit Clarifying Questions.....	June 29, 2026, 5:00 PM, Pacific Time
Request for Proposals Closing Date and Time....	July 14, 2026, 2:00 PM, Pacific Time
Deadline to Submit Protest of Award.....	Seven (7) days from the Intent to Award

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SECTION 1 NOTICE OF REQUEST FOR PROPOSALS

Notice is hereby given that Clackamas County through its Board of County Commissioners will receive sealed Proposals per specifications until **2:00 PM, July 14, 2026** (“Closing”), to provide Collateral Fulfillment and Storage Services. No Proposals will be received or considered after that time.

Location of RFP documents: OregonBuys

RFP Documents can be downloaded from the state of Oregon procurement website (“OregonBuys”) at the following address <https://oregonbuys.gov/bsv/view/login/login.xhtml>, Document No. S-C01010-00017242..

Prospective Proposers will need to sign in to download the information and that information will be accumulated for a Plan Holder's List. Prospective Proposers are responsible for obtaining any Addenda, clarifying questions, and Notices of Award from OregonBuys.

Submitting Proposals: Bid Locker

Proposals will only be accepted electronically thru a secure online bid submission service, **Bid Locker**. *Email submissions to Clackamas County email addresses will no longer be accepted.*

- A. Completed proposal documents must arrive electronically via Bid Locker located at <https://bidlocker.us/a/clackamascounty/BidLocker>.
- B. Bid Locker will electronically document the date and time of all submissions. Completed documents must arrive by the deadline indicated in Section 1 or as modified by Addendum. **LATE PROPOSALS WILL NOT BE ACCEPTED.**
- C. Proposers must register and create a profile for their business with Bid Locker in order to submit for this project. It is free to register for Bid Locker.
- D. Proposers with further questions concerning Bid Locker may review the Vendor’s Guide located at <https://www.clackamas.us/how-to-bid-on-county-projects> .

Contact Information

Procurement Process and Technical Questions: Stephanie Eber at sebner@clackamas.us

The Board of County Commissioners reserves the right to reject any and all Proposals not in compliance with all prescribed public bidding procedures and requirements, and may reject for good cause any and all Proposals upon the finding that it is in the public interest to do so and to waive any and all informalities in the public interest. In the award of the contract, the Board of County Commissioners will consider the element of time, will accept the Proposal or Proposals which in their estimation will best serve the interests of Clackamas County and will reserve the right to award the contract to the contractor whose Proposal shall be best for the public good.

Clackamas County encourages proposals from Minority, Women, Veteran and Emerging Small Businesses.

SECTION 2 INSTRUCTIONS TO PROPOSERS

Clackamas County (“County”) reserves the right to reject any and all Proposals received as a result of this RFP. County Local Contract Review Board Rules (“LCRB”) govern the procurement process for the County.

2.1 Modification or Withdrawal of Proposal: Any Proposal may be modified or withdrawn at any time prior to the Closing deadline, provided that a written request is received by the County Procurement Division Director, prior to the Closing. The withdrawal of a Proposal will not prejudice the right of a Proposer to submit a new Proposal.

2.2 Requests for Clarification and Requests for Change: Proposers may submit questions regarding the specifications of the RFP. Questions must be received in writing on or before 5:00 p.m. (Pacific Time), on the date indicated in the Schedule, at the Procurement Division address as listed in Section 1 of this RFP. Requests for changes must include the reason for the change and any proposed changes to the requirements. The purpose of this requirement is to permit County to correct, prior to the opening of Proposals, RFP terms or technical requirements that may be unlawful, improvident or which unjustifiably restrict competition. County will consider all requested changes and, if appropriate, amend the RFP. No oral or written instructions or information concerning this RFP from County managers, employees or agents to prospective Proposers shall bind County unless included in an Addendum to the RFP.

2.3 Protests of the RFP/Specifications: Protests must be in accordance with LCRB C-047-0730. Protests of Specifications must be received in writing on or before 5:00 p.m. (Pacific Time), on the date indicated in the Schedule, or within three (3) business days of issuance of any addendum, at the Procurement Division address listed in Section 1 of this RFP. Protests may not be faxed. Protests of the RFP specifications must include the reason for the protest and any proposed changes to the requirements.

2.4 Addenda: If any part of this RFP is changed, an addendum will be provided to Proposers that have provided an address to the Procurement Division for this procurement. It shall be Proposers responsibility to regularly check OregonBuys for any notices, published addenda, or response to clarifying questions.

2.5 Submission of Proposals: Proposals must be submitted in accordance with Section 5. All Proposals shall be legibly written in ink or typed and comply in all regards with the requirements of this RFP. Proposals that include orders or qualifications may be rejected as irregular. All Proposals must include a signature that affirms the Proposer’s intent to be bound by the Proposal (may be on cover letter, on the Proposal, or the Proposal Certification Form) shall be signed. If a Proposal is submitted by a firm or partnership, the name and address of the firm or partnership shall be shown, together with the names and addresses of the members. If the Proposal is submitted by a corporation, it shall be signed in the name of such corporation by an official who is authorized to bind the contractor. The Proposals will be considered by the County to be submitted in confidence and are not subject to public disclosure until the notice of intent to award has been issued.

No late Proposals will be accepted. Proposals submitted after the Closing will be considered late and will be returned unopened. Proposals may not be submitted by telephone or fax.

2.6 Post-Selection Review and Protest of Award: County will name the apparent successful Proposer in a Notice of Intent to Award published on OregonBuys. Identification of the apparent successful Proposer is procedural only and creates no right of the named Proposer to award of the contract. Competing Proposers shall be given seven (7) calendar days from the date on the Notice of Intent to Award to review the file at the Procurement Division office and file a written protest of award, pursuant to LCRB C-047-0740. Any award protest must be in writing and must be delivered by email, hand-delivery or mail to the address for the Procurement Division as listed in Section 1 of this RFP.

Only actual Proposers may protest if they believe they have been adversely affected because the Proposer would be eligible to be awarded the contract in the event the protest is successful. The basis of the written protest must be in accordance with ORS 279B.410 and shall specify the grounds upon which the protest is based. In order to be an adversely affected Proposer with a right to submit a written protest, a Proposer must be next in line for

award, i.e. the protester must claim that all higher rated Proposers are ineligible for award because they are non-responsive or non-responsible.

County will consider any protests received and:

- a. reject all protests and proceed with final evaluation of, and any allowed contract language negotiation with, the apparent successful Proposer and, pending the satisfactory outcome of this final evaluation and negotiation, enter into a contract with the named Proposer; OR
- b. sustain a meritorious protest(s) and reject the apparent successful Proposer as nonresponsive, if such Proposer is unable to demonstrate that its Proposal complied with all material requirements of the solicitation and Oregon public procurement law; thereafter, County may name a new apparent successful Proposer; OR
- c. reject all Proposals and cancel the procurement.

2.7 Acceptance of Contractual Requirements: Failure of the selected Proposer to execute a contract and deliver required insurance certificates within ten (10) calendar days after notification of an award may result in cancellation of the award. This time period may be extended at the option of County.

2.8 Public Records: Proposals are deemed confidential until the “Notice of Intent to Award” letter is issued. This RFP and one copy of each original Proposal received in response to it, together with copies of all documents pertaining to the award of a contract, will be kept and made a part of a file or record which will be open to public inspection. If a Proposal contains any information that is considered a **TRADE SECRET** under ORS 192.345(2), **SUCH INFORMATION MUST BE LISTED ON A SEPARATE SHEET CAPABLE OF SEPARATION FROM THE REMAINING PROPOSAL AND MUST BE CLEARLY MARKED WITH THE FOLLOWING LEGEND:**

“This information constitutes a trade secret under ORS 192.345(2), and shall not be disclosed except in accordance with the Oregon Public Records Law, ORS Chapter 192.”

The Oregon Public Records Law exempts from disclosure only bona fide trade secrets, and the exemption from disclosure applies only “unless the public interest requires disclosure in the particular instance” (ORS 192.345). Therefore, non-disclosure of documents, or any portion of a document submitted as part of a Proposal, may depend upon official or judicial determinations made pursuant to the Public Records Law.

2.9 Investigation of References: County reserves the right to investigate all references in addition to those supplied references and investigate past performance of any Proposer with respect to its successful performance of similar services, its compliance with specifications and contractual obligations, its completion or delivery of a project on schedule, its lawful payment of subcontractors and workers, and any other factor relevant to this RFP. County may postpone the award or the execution of the contract after the announcement of the apparent successful Proposer in order to complete its investigation.

2.10 RFP Proposal Preparation Costs and Other Costs: Proposer costs of developing the Proposal, cost of attendance at an interview (if requested by County), or any other costs are entirely the responsibility of the Proposer, and will not be reimbursed in any manner by County.

2.11 Clarification and Clarity: County reserves the right to seek clarification of each Proposal, or to make an award without further discussion of Proposals received. Therefore, it is important that each Proposal be submitted initially in the most complete, clear, and favorable manner possible.

2.12 Right to Reject Proposals: County reserves the right to reject any or all Proposals or to withdraw any item from the award, if such rejection or withdrawal would be in the public interest, as determined by County.

2.13 Cancellation: County reserves the right to cancel or postpone this RFP at any time or to award no contract.

2.14 Proposal Terms: All Proposals, including any price quotations, will be valid and firm through a period of one hundred and eighty (180) calendar days following the Closing date. County may require an

extension of this firm offer period. Proposers will be required to agree to the longer time frame in order to be further considered in the procurement process.

2.15 Oral Presentations: At County's sole option, Proposers may be required to give an oral presentation of their Proposals to County, a process which would provide an opportunity for the Proposer to clarify or elaborate on the Proposal but will in no material way change Proposer's original Proposal. If the evaluating committee requests presentations, the Procurement Division will schedule the time and location for said presentation. Any costs of participating in such presentations will be borne solely by Proposer and will not be reimbursed by County. **Note:** Oral presentations are at the discretion of the evaluating committee and may not be conducted; therefore, **written Proposals should be complete.**

2.16 Usage: It is the intention of County to utilize the services of the successful Proposer(s) to provide services as outlined in the below Scope of Work.

2.17 Review for Responsiveness: Upon receipt of all Proposals, the Procurement Division or designee will determine the responsiveness of all Proposals before submitting them to the evaluation committee. If a Proposal is incomplete or non-responsive in significant part or in whole, it will be rejected and will not be submitted to the evaluation committee. County reserves the right to determine if an inadvertent error is solely clerical or is a minor informality which may be waived, and then to determine if an error is grounds for disqualifying a Proposal. The Proposer's contact person identified on the Proposal will be notified, identifying the reason(s) the Proposal is non-responsive. One copy of the Proposal will be archived and all others discarded.

2.18 RFP Incorporated into Contract: This RFP will become part of the Contract between County and the selected contractor(s). The contractor(s) will be bound to perform according to the terms of this RFP, their Proposal(s), and the terms of the Sample Contract.

2.19 Communication Blackout Period: Except as called for in this RFP, Proposers may not communicate with members of the Evaluation Committee or other County employees or representatives about the RFP during the procurement process until the apparent successful Proposer is selected, and all protests, if any, have been resolved. Communication in violation of this restriction may result in rejection of a Proposer.

2.20 Prohibition on Commissions and Subcontractors: County will contract directly with persons/entities capable of performing the requirements of this RFP. Contractors must be represented directly. Participation by brokers or commissioned agents will not be allowed during the Proposal process. Contractor shall not use subcontractors to perform the Work unless specifically pre-authorized in writing to do so by the County. Contractor represents that any employees assigned to perform the Work, and any authorized subcontractors performing the Work, are fully qualified to perform the tasks assigned to them, and shall perform the Work in a competent and professional manner. Contractor shall not be permitted to add on any fee or charge for subcontractor Work. Contractor shall provide, if requested, any documents relating to subcontractor's qualifications to perform required Work.

2.21 Ownership of Proposals: All Proposals in response to this RFP are the sole property of County, and subject to the provisions of ORS 192.410-192.505 (Public Records Act).

2.22 Clerical Errors in Awards: County reserves the right to correct inaccurate awards resulting from its clerical errors.

2.23 Rejection of Qualified Proposals: Proposals may be rejected in whole or in part if they attempt to limit or modify any of the terms, conditions, or specifications of the RFP or the Sample Contract.

2.24 Collusion: By responding, the Proposer states that the Proposal is not made in connection with any competing Proposer submitting a separate response to the RFP, and is in all aspects fair and without collusion or fraud. Proposer also certifies that no officer, agent, elected official, or employee of County has a pecuniary interest in this Proposal.

2.25 Evaluation Committee: Proposals will be evaluated by a committee consisting of representatives from County and potentially external representatives. County reserves the right to modify the Evaluation Committee make-up in its sole discretion.

2.26 Commencement of Work: The contractor shall commence no work until all insurance requirements have been met, the Protest of Awards deadline has been passed, any protest have been decided, a contract has been fully executed, and a Notice to Proceed has been issued by County.

2.27 Nondiscrimination: The successful Proposer agrees that, in performing the work called for by this RFP and in securing and supplying materials, contractor will not discriminate against any person on the basis of race, color, religious creed, political ideas, sex, age, marital status, sexual orientation, gender identity, veteran status, physical or mental handicap, national origin or ancestry, or any other class protected by applicable law.

SECTION 3 SCOPE OF WORK

3.1. INTRODUCTION

The Clackamas County Office of Tourism (“Tourism”) is seeking proposals from qualified companies, firms, individual contractors or agencies (“Contractor”) to provide comprehensive fulfillment services. Services include processing and mailing collateral and printed materials, storing printed inventory, maintaining customer lead data and providing monthly reporting.

Please direct all Technical/Specifications or Procurement Process Questions to the indicated representative referenced in the Notice of Request for Proposals and note the communication restriction outlined in Section 2.19.

3.2 BACKGROUND

Tourism, representing Clackamas County as the travel destination of Oregon's Mt. Hood Territory, is dedicated to developing and promoting tourism opportunities in Clackamas County. A nine-member industry-represented Tourism Development Council, appointed by the Board of County Commissioners, guides the work.

Tourism’s mission is to enhance the quality of life for residents by optimizing the economic impacts of the tourism industry derived from the County’s Transient Room Tax.

Tourism’s [5-year Strategic Priorities](https://www.mthoodterritory.com//final-strategic-priorities-objectives-and-strategies-2024.pdf) (https://www.mthoodterritory.com//final-strategic-priorities-objectives-and-strategies-2024.pdf) work in tandem with this mission and include:

1. Build local tourism value through relevant tourism resources and awareness
2. Enhance authentic experiences so businesses, communities and the economy thrive
3. Encourage behaviors and practices that benefit the natural environment
4. Improve the awareness and experience of Mt. Hood Territory as an inclusive and accessible destination
5. Drive visitation that aligns with the specific needs of a place including regional and seasonal needs

These Strategic Priorities require nuanced messaging to potential visitors to ensure Tourism both attracts visitors who are interested in experiences that accomplish the same goals and makes it easy for them to find those opportunities.

Some materials that move these efforts forward are Tourism’s:

- Annual printed and digital travel planner
- Monthly consumer digital newsletter

Travel planner specs are (subject to change):

- 8.375" x 10.875"
- 60-page magazine
- Approximately 0.383 oz

Travel Planner Weight: The current printed travel planner (56 pages: 4-page cover on 80# stock and 52 interior pages on 60# book stock) weighs **approximately 0.355 ounces** per piece. The publication is

expected to increase to **60 total pages** (4-page cover and 56 interior pages). the estimated weight is **approximately 0.383 ounces**. This estimate is provided for planning purposes only, and final weight may vary based on print specifications, paper stock, coatings or other production variables.

Fulfillment services directly support Tourism's ability to provide accurate information to prospective visitors, manage inventory efficiently and respond to customer inquiries promptly.

3.3. SCOPE OF WORK

3.3.1. Scope:

Leads fulfillment and collateral storage include processing data, mailing print pieces, managing postage, supporting printing needs, storing collateral and providing reporting as described below.

The Contractor will perform all services using industry-standard fulfillment practices designed to ensure accuracy, timeliness and secure handling of Tourism materials and consumer lead data. The Contractor will designate a primary and secondary point of contact responsible for coordinating operational needs, receiving instructions and communicating service-related issues.

Consumer lead data provided by Tourism will be used solely for the fulfillment services described in this RFP. The Contractor will not sell, transfer or repurpose lead data for any other purpose.

The Contractor will maintain reasonable administrative, technical and physical safeguards to protect consumer lead data. The Contractor will restrict access to consumer data to only those staff required to perform fulfillment functions. The Contractor will use secure transfer methods when receiving leads from Tourism or approved third-party vendors. The Contractor will notify Tourism within two (2) business days of any unauthorized access, data breach or loss involving Tourism information. The Contractor will not store Tourism data outside the United States without prior written approval. The Contractor will not retain Tourism's lead data after contract expiration, except as required for financial reconciliation, and will certify destruction of remaining digital records upon request.

Tourism may introduce additional collateral types during the term of the contract. These may include but are not limited to brochures, postcards, flyers, rack cards or other printed materials. The Contractor will support fulfillment and storage requests for these additional collateral types within their operational capacity. Upon request, the Contractor will provide pricing for mailing, handling or storage of additional collateral items for review and approval by Tourism prior to any work being performed.

The Contractor will perform all fulfillment tasks promptly and accurately. Lead processing, de-duplication, formatting and address preparation will be completed in time for inclusion in the next scheduled bulk mailing batch. All services will be performed in a manner consistent with industry standards.

The Contractor will maintain reasonable plans to ensure continuity of fulfillment operations in the event of facility disruptions, system failures, staffing shortages or supply chain interruptions. The Contractor will notify Tourism promptly of any conditions that may significantly affect fulfillment operations.

The Contractor will have the capability to receive multiple "raw" lead files from various vendors and perform all required formatting, standardization and consolidation prior to de-duplication and mailing preparation. The Contractor will also separate digital-only leads and exclude them from mailing lists unless Tourism specifies otherwise. If Tourism chooses to continue standardizing lists internally, the Contractor will accept either raw or pre-formatted lists as directed by Tourism. The Contractor will

review submitted lead files for obvious data quality issues, including fictitious, profane or offensive recipient names. When a valid mailing address is present, unsuitable recipient names shall be replaced with "Current Resident" unless otherwise directed by Tourism.

Contractor will provide:

Mailing

- Process and ship bulk collateral requests, including full boxes or cases of travel planners and other Tourism materials, to visitor centers, tourism partners, businesses and other approved recipients as directed by Tourism
- Hold and batch mailings to achieve bulk mail rates whenever possible (typically at least once/month)
- Process and convert lead data, including de-duplication
- Perform USPS address verification (e.g., NCOA or equivalent) and provide Tourism with updated forwarding address information as part of regular reporting
- Presort mail according to USPS requirements
- Insert travel planners into envelopes
- Seal envelopes
- Apply addresses and permit imprints using industry-standard addressing methods
- Use the Contractor's own postal permit imprint unless Tourism specifically requests use of a County-owned permit
- Ship completed mailings

Postage

- The Contractor will manage all domestic and international postage required for fulfillment activities
- The Contractor will follow USPS and applicable carrier requirements
- The Contractor will apply the most cost-effective bulk or presort rates available unless Tourism requests otherwise
- Tourism may request specific mailing methods or service levels depending on project needs
- The Contractor will not add handling or processing fees to postage costs unless expressly approved by Tourism in advance
- The Contractor will provide documentation for any postage rate changes charged to Tourism
- If any mailing is deemed non-compliant with USPS or carrier requirements due to Contractor error, the Contractor will correct the issue and re-mail affected items at no additional cost to Tourism

Printing

- The Contractor will support printing needs related to fulfillment, including envelope printing and any additional materials mutually agreed upon
- Envelope specifications currently include a black-and-white logo, 9" x 12" size and 24# weight
- Tourism may update envelope artwork, return address and related specifications at any time, including use of existing envelope inventory before reprinting

- The Contractor will not add printing setup or processing fees unless expressly approved by Tourism in advance

Collateral Storage

- Store and manage Tourism’s annual travel planner shipment, which is typically eight (8) to nine (9) pallets
- Provide total storage capacity for ten (10) to twelve (12) pallets at any given time to accommodate travel planner shipments, additional collateral and temporary overlap between print runs
- Contractor will maintain storage capacity for this volume at all times
- Contractor will periodically accept collateral shipments at the storage unit, including a shipment of up to nine (9) pallets
- Contractor will maintain a clean, dry, secure storage environment with appropriate access controls
- Contractor will maintain accurate inventory records for all stored collateral and reflect this information in monthly reporting
- The Contractor will maintain a continuously updated (running) inventory record in addition to monthly reports
- Tourism will have reasonable access to the storage facility to retrieve collateral as needed
- The Contractor will coordinate with Tourism to accommodate timely pickup during standard business hours or as otherwise mutually agreed
- No additional fees may be charged for Tourism’s retrieval of stored collateral unless expressly approved in advance
- Recycle, destroy or otherwise dispose of outdated, damaged or superseded collateral upon Tourism’s direction
- Provide written confirmation of collateral disposal upon request
- Return or destroy any printed collateral, envelopes, digital files, address lists or other materials produced, handled or stored under this contract upon Tourism’s request
- Conduct one (1) physical inventory count per contract year and provide a reconciliation report to Tourism

Reporting

Tourism requires a report at least once per month that includes the following:

- Total number of requests
- Breakdown by location mailed (US states and international)
- Inventory
- List of email opt-ins with supporting data
- Leads with missing address elements
- List of undeliverable addresses identified through USPS returns processing, if available
- Count of digital-only leads separated from raw files (if applicable)
- List of valid forwarding addresses identified through USPS address verification (if not already included in another section of reporting)

The Contractor will also provide a brief summary noting any unusual fluctuations, anomalies or trends in lead volume, returned mail or digital-only signups to assist Tourism in monitoring potential issues or shifts in consumer behavior when applicable.

In addition, the Contractor will add all digital-only newsletter opt-ins (with supporting data) to Tourism's designated newsletter signup list as part of routine reporting and data delivery.

Reports will be delivered via email in a mutually agreed-upon format (e.g., Excel, CSV, PDF)

Tourism Responsibilities

Tourism will provide:

- Biweekly (twice-per-month) lead files from approved third-party vendors, either in raw format or pre-standardized format depending on operational preference
- If Tourism standardizes lead files, Tourism will provide a consolidated, formatted list; however, the Contractor must be prepared to accept and process raw lists if Tourism elects to shift this responsibility
- If Tourism elects not to separate digital-only leads, the Contractor will assume responsibility for identifying and separating digital-only records from mailing lists and will include a monthly count of digital-only records in reporting
- Current collateral specifications, including envelope artwork, logo files and any other assets required for printing
- Direction on use of existing envelope inventory prior to approval of new print runs
- Advance notice of new collateral types or updates to existing materials
- Advance notice of changes to mailing cadence or fulfillment quantities
- Timely approvals required for postage changes, printing needs or additional collateral handling
- Access to Tourism staff for operational coordination as needed
- Tourism will not guarantee any minimum or maximum volume of leads or collateral and may adjust quantities as needed

3.3.2. Work Schedule:

The Contractor will perform fulfillment and storage services according to the following recurring schedule. All timeframes refer to business days unless otherwise noted.

Biweekly Tasks (twice per month)

1. Lead Delivery
 - Tourism will provide the Contractor with biweekly consumer lead files generated by approved third-party media partners
 - The Contractor will receive and prepare leads for inclusion in the next scheduled bulk mailing
 - The Contractor will perform formatting, standardization and consolidation of multiple raw lead files unless Tourism specifies otherwise
 - If Tourism elects to continue standardizing lead files internally, the Contractor will accept consolidated lists instead and proceed with de-duplication and address preparation
 - The Contractor will identify and separate digital-only leads as part of biweekly processing unless Tourism specifies otherwise

- The Contractor will provide Tourism with a separated digital-only lead file that includes all digital-only newsletter opt-ins and supporting data required for Tourism to add these records to its newsletter list

Monthly Tasks

1. Fulfillment Reporting

The Contractor will provide Tourism with a monthly report that includes:

- Total number of consumer requests fulfilled
- Distribution by U.S. state and international destination
- Current inventory levels
- List of email opt-ins with supporting data
- List of leads with missing address information
- List of collateral returned as undeliverable
- Summary of returned mail added back into inventory (if applicable)

2. Mailing Cadence

- The Contractor will batch travel planner mailings to align with bulk-rate requirements, which typically results in at least one mailing per month
- The Contractor will ensure all lead processing, formatting, de-duplication and address preparation are completed in time for inclusion in the next scheduled bulk mailing batch

3. Inventory Review

- The Contractor will monitor collateral levels monthly and notify Tourism if inventory is low and may require replenishment
- Any discrepancies between physical counts and recorded inventory will be communicated to Tourism immediately

Additional Requirements

- Tourism may adjust the timing of lead transfers, mailing frequency or reporting needs with advance notice
- If a scheduled reporting date falls on a weekend or County-recognized holiday, the deadline may shift to the next business day by mutual agreement
- The Contractor will notify Tourism of any operational issues that may affect mailing schedules, data processing or storage capacity
- The Contractor will maintain service continuity to the greatest extent practicable during staffing shortages, facility disruptions or supply chain issues and notify Tourism promptly of any conditions that may significantly affect fulfillment operations
- Lead processing and reporting will be completed within reasonable timeframes consistent with industry standards

3.3.3. Term of Contract:

The term of the contract will be from the effective date through June 30, 2031.

Because the resulting contract may span multiple years, any changes in fees during renewal periods must follow a defined methodology. The Contractor will identify whether annual increases are anticipated and describe how such increases will be calculated. General service fees may be tied to CPI. The Contractor will also outline how they will handle changes in third-party pass-through costs such as USPS postage,

shipping carrier rates or printing material costs, which may fluctuate independently of CPI. Any adjustments to pass-through costs must be supported by published rate changes or documented supplier increases.

The County's procurement authority will incorporate the County's standard CPI-based rate adjustment clause into the final contract.

The County reserves the right to negotiate final terms and pricing prior to contract execution.

3.3.4 Sample Contract: Submission of a Proposal in response to this RFP indicates Proposer's willingness to enter into a contract containing substantially the same terms (including insurance requirements) of the sample contract identified below. No action or response to the sample contract is required under this RFP. Any objections to the sample contract terms should be raised in accordance with Paragraphs 2.2 or 2.3 of this RFP, pertaining to requests for clarification or change or protest of the RFP/specifications, and as otherwise provided for in this RFP. This RFP and all supplemental information in response to this RFP will be a binding part of the final contract.

The applicable Sample Personal Services Contract for this RFP can be found at <https://www.clackamas.us/finance/terms.html>.

Goods & Services Contract (unless checked, item does not apply)

Travel Expense Reimbursement is Authorized

The following insurance requirements will be applicable.

- Professional Liability: combined single limit, or the equivalent, of not less than \$1,000,000 per occurrence, with an annual aggregate limit of \$2,000,000 for damages caused by error, omission or negligent acts.
- Commercial General Liability: combined single limit, or the equivalent, of not less than \$1,000,000 per occurrence, with an annual aggregate limit of \$2,000,000 for Bodily Injury and Property Damage.
- Automobile Liability: combined single limit, or the equivalent, of not less than \$500,000 per occurrence for Bodily Injury and Property Damage.

**SECTION 4
EVALUATION PROCEDURE**

4.1 An evaluation committee will review all Proposals that are initially deemed responsive and they shall rank the Proposals in accordance with the below criteria. The evaluation committee may recommend an award based solely on the written responses or may request Proposal interviews/presentations. Interviews/presentations, if deemed beneficial by the evaluation committee, will consist of the highest scoring Proposers. The invited Proposers will be notified of the time, place, and format of the interview/presentation. Based on the interview/presentation, the evaluation committee may revise their scoring.

Written Proposals must be complete and no additions, deletions, or substitutions will be permitted during the interview/presentation (if any). The evaluation committee will recommend award of a contract to the final County decision maker based on the highest scoring Proposal. The County decision maker reserves the right to accept the recommendation, award to a different Proposer, or reject all Proposals and cancel the RFP.

Proposers are not permitted to directly communicate with any member of the evaluation committee during the evaluation process. All communication will be facilitated through the Procurement representative.

4.2 Evaluation Criteria

<u>Category</u>	<u>Points available:</u>
Proposer’s General Background and Qualifications	0-30
Scope of Work	0-45
Fees	0-25
Available points	0-100

4.3 Once a selection has been made, the County will enter into contract negotiations. During negotiation, the County may require any additional information it deems necessary to clarify the approach and understanding of the requested services. Any changes agreed upon during contract negotiations will become part of the final contract. The negotiations will identify a level of work and associated fee that best represents the efforts required. If the County is unable to come to terms with the highest scoring Proposer, discussions shall be terminated and negotiations will begin with the next highest scoring Proposer. If the resulting contract contemplates multiple phases and the County deems it is in its interest to not authorize any particular phase, it reserves the right to return to this solicitation and commence negotiations with the next highest ranked Proposer to complete the remaining phases.

SECTION 5 PROPOSAL CONTENTS

5.1. Vendors must observe submission instructions and be advised as follows:

5.1.1. Proposals will only be accepted electronically thru Equity Hub's Bid Locker. Email submissions to Clackamas County email addresses will no longer be accepted.

5.1.2. Completed proposal documents must arrive electronically via Equity Hub's Bid Locker located at <https://bidlocker.us/a/clackamascounty/BidLocker>.

5.1.3. County reserves the right to solicit additional information or Proposal clarification from the vendors, or any one vendor, should the County deem such information necessary.

5.1.4. Proposal may not exceed a total of **20 pages** (single-sided), inclusive of all exhibits, attachments, title pages, pages separations, table of contents, or other information. The Proposal Certification Page will NOT count towards the final page count. Pages shall be 8-1/2" x 11" standard sheet size, 11 point font, single-spaced.

Provide the following information in the order in which it appears below:

5.2. Proposer's General Background and Qualifications:

- A brief description of the firm, including years in business, ownership structure and primary services offered
- A list of key staff who would support this contract and their roles (resumes or bios are optional)
- A summary of similar fulfillment and storage services performed within the past five (5) years, including at least one public-sector client if applicable
- A description of the firm's capacity to take on this contract (e.g., staffing levels, facility size, current workload)
- A brief explanation of any unique capabilities, operational strengths or service offerings that distinguish the firm from competitors

5.3. Scope of Work

Proposers must clearly demonstrate their ability to perform the services described in Section 3 (Scope of Work). Responses may be brief and may be provided in bullet or checklist form. Please address the following:

Task Ownership & Flexibility

- Identify any tasks for which you can provide either Contractor-performed or Tourism-performed options (e.g., raw lead file formatting, digital-only separation, address validation steps, reintroducing returned mail into inventory)
- Describe the cost differences associated with each option
- If optional levels of service are available, provide a clear breakdown so Tourism can evaluate the operational and budget impacts of choosing one option over another

Lead Processing & Data Handling

- Confirm your ability to receive biweekly lead files from multiple third-party vendors

- Describe your process for de-duplication and address validation, including typical turnaround time
- Confirm that you can complete lead processing in time to meet bulk-mailing schedules
- Describe how consumer data is stored, secured and restricted to authorized staff
- Confirm that you can comply with data privacy and security requirements included in Section 3
- Indicate whether you have any volume thresholds, automation tools or system limitations that may affect processing raw lead files or digital-only separation
- Confirm your ability to separate digital-only leads and provide them to Tourism in a format that supports newsletter list management workflows

Mailing & Fulfillment Operations

- Describe your standard workflow for preparing bulk mailings, including batching, addressing and presorting
- Confirm your ability to meet USPS bulk-mail requirements and correct any errors at no cost to Tourism
- Identify any limits on volume or seasonal capacity
- Describe your quality control procedures to ensure accurate fulfillment
- Clarify whether reintroducing returned mail pieces into inventory has operational limitations or cost considerations
- Confirm whether you would use Tourism’s permit imprint or your own, and describe any cost or process differences associated with each option

Postage Management

- Confirm that you will apply the most cost-effective postage rates available
- Describe how postage is documented and invoiced
- Explain how you track and communicate USPS rate changes

Printing Support

- Confirm your ability to print envelopes to the specifications listed in Section 3
- Describe any additional printing capabilities relevant to fulfillment
- Identify lead times needed for envelope or collateral printing

Collateral Storage & Inventory Management

- Confirm that you can store 10–12 pallets of Tourism materials at any time
- Describe your facility’s security, environmental controls and access procedures
- Describe how inventory is tracked and how frequently it is updated
- Confirm your ability to accept palletized deliveries of up to nine (9) pallets at one time
- Describe your process for Tourism staff to pick up collateral on-site

Returned Mail, Disposal & End-of-Life Handling

- Describe how undeliverable or returned items are tracked and reported
- Confirm your ability to retain returned mail for one (1) month and recycle afterwards
- Describe your procedures for disposal of outdated, damaged or superseded collateral

- Confirm your ability to provide written disposal confirmation and year-end inventory reconciliation

Reporting Requirements

- Confirm that you can provide monthly reporting with all required elements listed in Section 3
- Describe your preferred reporting format(s)
- Identify any system limitations that would affect reporting
- Confirm your ability to deliver digital-only leads and newsletter opt-ins in a format compatible with Tourism’s email platform or CRM, including supporting data fields

Staffing & Continuity

- Identify the primary and secondary contacts assigned to this project
- Describe your plan for maintaining continuity of services during staff absences or facility disruptions

5.4. Fees

Proposers must provide a complete fee structure for all services described in Section 3. Proposers may use their standard pricing format. At minimum, proposals must include:

- Unit pricing for fulfillment activities (e.g., per-piece handling, addressing, inserting or other applicable charges)
- Monthly or annual storage fees, including any tiered pricing, minimums or volume limits
- Printing costs for envelopes or other materials, if offered
- A description of how postage will be billed to Tourism (e.g., actual USPS rate pass-through, use of a postage escrow account, or other method)
- Identification of any additional service fees that may apply and the circumstances in which they would be charged
- Pricing for optional tasks that Tourism may request, including but not limited to formatting raw lead files, separating digital-only leads, or reintroducing returned mail pieces into inventory for potential remailing
- Proposers must clearly distinguish between base services included in standard pricing and optional services that would incur additional costs
- An estimated total annual cost based on the volumes described in this RFP, including assumptions used to generate the estimate

Proposers must also provide pricing for tasks that may be optionally assigned to the Contractor or left with Tourism, including but not limited to:

- Formatting and standardizing raw lead files
- Separating digital-only leads from mailing files
- The clarity with which the Proposer distinguishes tasks included in base pricing from those offered as optional

- The Proposer’s willingness and ability to perform tasks that may currently be performed by Tourism staff (e.g., raw lead file formatting, separating digital-only leads, or reintroducing returned mail into inventory)
- The cost implications of shifting these tasks to the Contractor
- Whether the Proposer offers flexible pricing or staffing models that allow Tourism to evaluate the most cost-effective division of responsibilities

5.5. References

Provide at least three (3) references from clients your firm has served similar to the County in the past three (3) years, including one client that has newly engaged the firm in the past thirty-six (36) months and one (1) long-term client. Provide the name, address, email, and phone number of the references. Please note the required three references may not be from County staff, but additional references may be supplied.

5.6. Completed Proposal Certification (see the below form)

PROPOSAL CERTIFICATION
RFP #2026-51

Submitted by: _____
(Must be entity's full legal name, and State of Formation)

Each Proposer must read, complete and submit a copy of this Proposal Certification with their Proposal. Failure to do so may result in rejection of the Proposal. By signature on this Proposal Certification, the undersigned certifies that they are authorized to act on behalf of the Proposer and that under penalty of perjury, the undersigned will comply with the following:

SECTION I. OREGON TAX LAWS: As required in ORS 279B.110(2)(e), the undersigned hereby certifies that, to the best of the undersigned's knowledge, the Proposer is not in violation of any Oregon Tax Laws. For purposes of this certification, "Oregon Tax Laws" means the tax laws of the state or a political subdivision of the state, including ORS 305.620 and ORS chapters 316, 317 and 318. If a contract is executed, this information will be reported to the Internal Revenue Service. Information not matching IRS records could subject Proposer to 24% backup withholding.

SECTION II. NON-DISCRIMINATION: That the Proposer has not and will not discriminate in its employment practices with regard to race, creed, age, religious affiliation, sex, disability, sexual orientation, gender identity, national origin, or any other protected class. Nor has Proposer or will Proposer discriminate against a subcontractor in the awarding of a subcontract because the subcontractor is a disadvantaged business enterprise, a minority-owned business, a woman-owned business, a business that a service-disabled veteran owns or an emerging small business that is certified under ORS 200.055.

SECTION III. CONFLICT OF INTEREST: The undersigned hereby certifies that no elected official, officer, agent or employee of Clackamas County is personally interested, directly or indirectly, in any resulting contract from this RFP, or the compensation to be paid under such contract, and that no representation, statements (oral or in writing), of the County, its elected officials, officers, agents, or employees had induced Proposer to submit this Proposal. In addition, the undersigned hereby certifies that this proposal is made without connection with any person, firm, or corporation submitting a proposal for the same material, and is in all respects fair and without collusion or fraud.

SECTION IV. COMPLIANCE WITH SOLICITATION: The undersigned further agrees and certifies that they:

1. Have read, understand and agree to be bound by and comply with all requirements, instructions, specifications, terms and conditions of the RFP (including any attachments); and
2. Are an authorized representative of the Proposer, that the information provided is true and accurate, and that providing incorrect or incomplete information may be cause for rejection of the Proposal or contract termination; and
3. Will furnish the designated item(s) and/or service(s) in accordance with the RFP and Proposal; and
4. Will use recyclable products to the maximum extend economically feasible in the performance of the contract work set forth in this RFP.

Name: _____ Date: _____
Signature: _____ Title: _____
Email: _____ Telephone: _____
Oregon Business Registry Number: _____ OR CCB # (if applicable): _____

Business Designation (check one):

Corporation Partnership Sole Proprietorship Non-Profit Limited Liability Company

Resident Quoter, as defined in ORS 279A.120

Non-Resident Quote. Resident State: _____