

BEFORE THE COUNCIL OF THE
METROPOLITAN SERVICE DISTRICT

FOR THE PURPOSE OF APPROVING A)	RESOLUTION NO. 90-1237
REQUEST FOR PROPOSAL DOCUMENT FOR)	
MARKETING RESEARCH SERVICES FOR A)	Introduced by the Council
THREE-YEAR PERIOD AT THE METRO)	Zoo Committee
WASHINGTON PARK ZOO)	

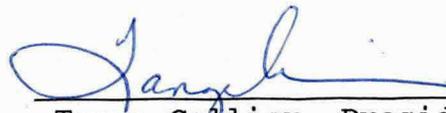
WHEREAS, Section 2.04.033 (b) of the Metro Code requires that the Council of the Metropolitan Service District approve certain contract proposal documents; and

WHEREAS, The contract for Marketing Research Services at the Metro Washington Park Zoo requires Council approval and the proposal document has been duly filed with the Clerk of the Council; now, therefore,

BE IT RESOLVED,

That the Council of the Metropolitan Service District approves the Request for Proposal document for Marketing Research Services at the Metro Washington Park Zoo attached as Exhibit A hereto and authorizes that it be released for response by vendors or proposers.

ADOPTED by the Council of the Metropolitan Service District
this 26th day of April, 1990.



Tanya Collier, Presiding Officer

jpmfour
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MARKETING RESEARCH REQUEST FOR PROPOSALS

I. INTRODUCTION

The Zoo Department of the Metropolitan Service District (Metro) is requesting proposals for marketing research services for a three-year period. Proposals are due no later than 1990, at Metro Washington Park Zoo, 4001 S.W. Canyon Road, Portland, OR 97221. Details concerning this project and proposal are contained in this document.

II. BACKGROUND OF PROJECT

The Zoo's Marketing Division is a five-person office which is responsible for the promotion of the zoo through advertising (usually on a public service basis), press relations and special events. The Marketing Manger reports to the Zoo Director.

The division coordinates a speakers bureau and sends out a travelling exhibit to shopping centers, fairs and other high-traffic public areas. The division has an aggressive program of marketing the zoo as a place for company picnics and arranged tours (through tour operators).

Gate surveys are used to monitor demographic profiles and habits of zoo visitors, test the popularity of programs and exhibits and evaluate the zoo's promotional efforts. Additional surveys done in past years have included an off-site survey of Portland area tourists, a phone survey of area residents and a zip code analysis of visitors.

III. PROPOSED SCOPE OF WORK/SCHEDULE

Metro is seeking proposals from qualified firms to perform the following services and to deliver the products described:

A. Contractor will conduct interview-type surveys of zoo visitors three times per year. Each survey will have at least 300 respondents and will be conducted over a seven-day period, with at least half of the interviews being conducted on Saturday and Sunday. Survey questions will be developed jointly by the Contractor and the Marketing Manager (most questions remain the same from survey to survey). Surveys will vary from 25 to 35 questions in length.

- III. cont.
- B. Contractor will provide the zoo with three copies of a report on the survey within three weeks after the completion of interviews. Report will include cross-tabulations.
 - C. Contractor will conduct at least one other survey per year of a scope similar to the gate survey.
 - D. Contractor will meet with the Marketing Manager for at least 2 hours per month to provide advice and consultation on a variety of matters concerning marketing research and program evaluation.
 - E. Estimated budget for the project is approximately \$15,000 per twelve- month period.
 - F. The contract is for a one-year period, renewable by mutual agreement for two additional years.

IV. QUALIFICATIONS AND EXPERIENCE

- A. Skill and experience formulating questionnaires and other survey tools
- B. Skill and experience in analyzing statistical data
- C. Skill and experience in interpreting results of surveys
- D. Skill and experience in conducting survey interviews
- E. Experience with zoos or similar tourism attractions

V. PROJECT ADMINISTRATION

The project manager is Jane Hartline, Marketing Manager. Contractor may also work with the zoo director, assistant director, development manager, other Metro staff and advertising agency staff as determined by the project manager.

VI. PROPOSAL INSTRUCTIONS

- A. Submission of Proposals

Three copies of the proposal shall be furnished to Metro addressed to:

Jane Hartline, Marketing Manager
Metro Washington Park Zoo
4001 SW Canyon Road
Portland, OR 97221

VI. cont. B. Deadline

Proposals will not be considered if received after 3:00 p.m., [redacted] 1990. Postmarks are not acceptable.

C. RFP as basis for proposals

This RFP represents the most definitive statement Metro will make concerning information upon which proposals are to be based. Any verbal information which is not contained in this RFP will not be considered by Metro in evaluating the proposals. All questions relating to the RFP, or the project, must be submitted in writing to Jane Hartline. Any questions which in the opinion of Metro warrant a written reply or RFP amendment will be furnished to all parties receiving a copy of this RFP. Metro will not respond to questions received after [redacted] 1990.

D. Subconsultants; Disadvantaged Business Program

A subconsultant is any person or firm proposed to work for the prime consultant on this project. Metro does not wish any subconsultant selection to be finalized prior to contract award. For any task or portion of a task to be undertaken by a subconsultant, the prime consultant shall not sign up a subconsultant on an exclusive basis.

In the event that any subconsultants are to be used in the performance of this agreement, consultant agrees to make a good faith effort, as that term is defined in Metro's Disadvantaged Business Program (Section 2.04.160 of the Metro Code) to reach the goals of subcontracting 5 percent of the contract amount to Disadvantaged Businesses and 5 percent of the contract amount to Women Businesses. Consultant shall contact Metro prior to negotiating any subcontracts. Metro reserves the right, at all times during the period of this agreement, to monitor compliance with the terms of this paragraph and Metro's Disadvantaged Business Program.

VII. PROPOSAL CONTENTS

Proposals should contain the following information:

- A. How your firm would perform the services described in the Scope of Work.
- B. Resumes of key personnel
- C. Amount of time each key person will be involved with the activities described in the above scope of work

VII. cont. D. List of subconsultants which might be used including identification of Certified Disadvantaged Business Enterprises and Women-owned Business Enterprises

E. Work history in terms of similar services

F. History of successful work previously completed for similar projects and ability to furnish recommendations of satisfied clients

G. A "not to exceed" fee.

VIII. GENERAL PROPOSAL/CONTRACT CONDITIONS

A. This RFP does not commit Metro to the award of a contract, nor to pay any costs incurred in the preparation and submission of proposals in anticipation of a contract. Metro reserves the right to accept or reject any or all proposals as the result of this request, to negotiate with all qualified sources, or to cancel all or part of this RFP.

B. Metro intends to award a personal services contract with the selected firm for this project. The contract will be for a one-year period, renewable for two additional years upon mutual agreement. A copy of the standard form contract which the successful consultant will be required to execute is attached (Attachment A.)

C. Proposers are informed that the billing procedures of the selected firm are subject to the review and prior approval of Metro before reimbursement of services can occur. A monthly billing, accompanied by a progress report will be prepared for review and approval.

D. The proposal shall be considered valid for a period of ninety (90) days at least and shall contain a statement to that effect. The proposal shall contain the name, title, address and telephone number of an individual or individuals with authority to bind any company contacted during the period in which Metro is evaluating the proposal.

IX. EVALUATION OF PROPOSALS

A. Proposals that conform to the proposal instructions will be evaluated. Proposals will be reviewed by a selection committee and oral presentations will be required of finalists in the selection process.

IX. cont. B. Evaluation criteria

This section provides a description of the criteria which will be used to evaluate proposals submitted to accomplish the work defined in the RFP.

1. Qualifications of principals (30)

2. Previous work (30)

References

Experience (include client list and examples of zoo or similar experience)

3. Proposal (20)

Demonstrated ability to complete the scope of work

4. Fee (20)



METRO

2000 S.W. First Avenue
Portland, OR 97201-5398
503/221-1646

Memorandum

DATE: March 20, 1990
TO: Contracts Office
FROM: Paulette Allen, Committee Clerk
RE: RFP FOR MARKETING RESEARCH: CONTRACT TYPE "A"

I certify the above RFP entitled "Marketing Research" was received and filed in the Council Department March 20, 1990.

Paulette Allen 3/20/90
Acting Clerk of the Council Date

cc: Jim Gardner
Neil E. Saling
Sherry Sheng
McKay Rich
Jane Hartline
Jessica Marlitt



METRO

2000 S.W. First Avenue
Portland, OR 97201-5398
503/221-1646

Memorandum

Date: March 20, 1990
To: Gwen Ware-Barrett, Clerk of the Council
From: Amha M. Hazen, Contracts Administrator *Amha*
Regarding: RFP: Marketing Research

I have attached the bid entitled "Marketing Research" for filing with Metro Council. The contract is Type "A" Single Year, as designated by the Council during the budge process.

AMH:jp

cc: Neil E. Saling, Acting Director - Finance & Administration
McKay Rich, Assistant Director - Zoo

Attachment

METRO WASHINGTON PARK ZOO

Contract Routing Slip and Attachments List

Date 3/15/90

RE: Marketing Research RFP

To: Amka Majer

From: Carol Kruger

List of Attachments:

- Proposed Request for Quotes/Bids/Proposals
- Staff Report
- Resolution
- Ordinance
- Grant/Contract Summary
- Three copies of contract or amendment
- Copy of Request for Quotes/Bids/Proposals
- Mailing List/Phone List (with DBE/WBE's marked)
- Quotes/Bids/Proposals Received
- Advertisements
- Bond(s) Type: _____
- One copy of executed contract or amendment
- Other _____

These items are:

For your approval and routing Per your request

For your retention Please return by _____

Other please file with Council

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File as an "A"

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ZOO COMMITTEE REPORT

RESOLUTION NO. 90-1237, APPROVING A REQUEST FOR PROPOSAL DOCUMENT FOR MARKETING RESEARCH SERVICES FOR A THREE-YEAR PERIOD AT THE METRO WASHINGTON PARK ZOO

Date: April 5, 1990

Presented by: Councilor McFarland

COMMITTEE RECOMMENDATION: At the April 5, 1990, Zoo Committee meeting, Councilors Gardner, Ragsdale and myself voted unanimously to recommend Council adopt Resolution No. 90-1237. Councilors DeJardin and Knowles were excused.

COMMITTEE DISCUSSION/ISSUES: Zoo Marketing Manager Jane Hartline presented the resolution which approves RFP documents for a three-year marketing research services contract. Ms. Hartline noted the Zoo now has a three-year contract for these services which will expire in May. The contract scope calls for three Zoo admission gate surveys each year -- 1 in the Fall, Spring and Summer -- and a fourth survey to be determined by the Zoo's particular program assessment or market information needs. It was noted the FY90-91 amount budgeted for this contract (\$15,000) is comparable to the FY89-90 budgeted expense (\$13,250). No additional questions or issues were raised regarding the contract.

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These items are:

____ For your approval and routing ____ Per your request

____ For your retention Please return by _____

Other please file with Council

c.transmit
can

File as an "A"

RECEIVED IN WA
COMM. DEV.

MAR 17 1990

COMM. DEV.
C
S