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**Oregon Tourism Commission, dba Travel Oregon  
Request for Proposal  
Fulfillment Services**

***Issuance Date:*** 02/03/2025

***Proposals Accepted:*** **Electronically**  
(Proposals will be accepted on an ongoing basis until 03/03/2025)

***Issuing Office:*** Oregon Tourism Commission, dba Travel Oregon  
Contracting & Procurement  
319 SW Washington, Suite 700  
Portland, Oregon 97204

***Contact:*** Edward Van Buren  
Director of Operations  
Telephone: 971.428.0162  
E-mail: rfp@traveloregon.com



**TRAVEL  
OREGON**

Request for Proposal (RFP) for  
RFP # 002-0125 Fulfillment Services

**SECTION I:     General Information, Application Process**

**SECTION II:    Requirements for Fulfillment Services**

**SECTION III:   Proposal Qualifications, Work Samples & Services**

**SECTION IIII: Proposal Forms & Exhibits**

The applicant is responsible for understanding all information contained in this RFP. Read all information carefully before submitting your proposal. If you have any questions about the RFP or process, please feel free to contact Travel Oregon. Incomplete proposals will not be processed. You will not be notified if your proposal is incomplete. OTC may or may not contract for work with any firm or firms that submit proposal materials and reserves the right to end this process or modify the anticipated work at its sole discretion.

**Direct Questions to: Edward Van Buren, Director of Operations**

Telephone: 971.428.0162

E-mail: [rfp@traveloregon.com](mailto:rfp@traveloregon.com)

## SECTION I: GENERAL INFORMATION AND APPLICATION PROCESS

### **About Travel Oregon**

The Oregon Tourism Commission (OTC), dba Travel Oregon, is a semi-independent state agency whose mission is to inspire travel that uplifts Oregon communities. Collaborating with stakeholders and partners to align as stewards of Oregon, we work to optimize economic opportunity, advance equity and respect the ecosystems, cultures and places that make Oregon...Oregon. A welcoming destination where tourism benefits the environment, celebrates cultural diversity and drives economic prosperity in every corner of the state, is the Oregon we envision. We aim to optimize Oregon's economy with a destination stewardship approach at the forefront of the decisions that guide our work.

### **About the (work/project)**

Travel Oregon is soliciting proposals from qualified firms to provide printed travel guide fulfillment and trip planning assistance to travelers. Specific activities include strategy development for guide fulfillment and customer service, answering Travel Oregon's telephone customer service line and responding to emails from both consumers as well as industry partners.

**Objective:** Ensure that Travel Oregon is the trusted resource for travel inspiration and trip information. When a consumer reaches out to Travel Oregon, they'll have a one-of-a-kind experience that inspires them to travel to Oregon and extend their trips. The visitor's first touchpoint with Oregon must be informative and inspirational.

### **Deliverables & Outcomes**

OTC seeks an agency to do the following:

- **Fulfillment:**
  1. Maintain and host software that can accept and process requests from Travel Oregon's guide order form where travelers can order free travel guides in individual quantities (forms.traveloregon.com/domestic-visitors-guide). The hosted software must maintain a minimum uptime of 99.5% and comply with relevant data privacy regulations, including GDPR and Oregon Consumer Information Protection Act (ORS 646A.600 et seq.)
    - Prepare and ship all requests received via email, phone and fax for case quantity tourism publications.
    - Perform address standardization to ensure that requests are not returned for non-deliverable.
  2. Prepare and mail all individual requests for tourism publications requested through the telephone customer service line, Travel Oregon's general information mail, email, WordPress-based website and fax inquiries and through the publications order request form.
    - Preparation and mailing includes pulling publications from inventory, laser printing name, physical address, return address and OTC's indicia onto 8.5 inch by 11 inch paper, hand inserting the sheet and any additional inserts into a polybag, machine sealing the polybag and general bulk sorting as required by the US Postal Office for bulk presort mailings.
      - Presort orders should be processed twice per week. A presort-eligible order should only wait one round before being pushed into 1<sup>st</sup> class mail. .

- Preparation and mailing of Travel Oregon Regional Partner (TORP) orders utilizes a flat rate envelope.
  - 3. Prepare and ship bulk quantities of new Travel Oregon guides to industry partners upon receiving.
  - 4. Manage shifts in volume based on promotions or campaigns without creating delays for the traveler.
  - 5. Trade Show Information Management: Pick, pack, ship and track trade show materials to ensure accurate and timely arrivals as requested by Travel Oregon. These often include partner materials and other non-standard items shipped domestically and internationally (subject to customs review).
  - 6. Store Travel Oregon and Travel Oregon Regional Pack (TORP) partner publications to be used in fulfilling inquiries. Travel Oregon provides an opportunity to the 7 regional partners to pay a small fee (\$1.25 per guide) to include their guide in a Travel Oregon packet. This happens when a person selects that region as an interest area.
  - 7. Manage the Travel Oregon Regional Pack (TORP) program. This includes managing annual agreements between Travel Oregon's fulfillment vendor and each of the 7 regional partners and handling monthly partner invoicing and inventory needs.
- **Reporting & Access to Customer Requests:**
    1. Produce a variety of reports including, but not limited to reports by:
      - Source (website, phone, etc.)
      - State
      - Zip code
      - Special interests
      - Publications ordered
    2. Provide an API or other real-time connection to transmit all customer information captured to Travel Oregon's database for reporting.
    3. Maintain Travel Oregon's monthly in-depth budget tracker.
    4. Provide timely low inventory level alerts and assist in forecasting when a product will likely run out.

- **Customer Service Telephone Line\***

\*If you do not currently provide these services, please state so in the appropriate section below.

1. Answer Travel Oregon's toll-free phone lines, and capture caller's name, address, phone number, email address, special interests and sources that prompted interest and other information as determined by Travel Oregon. Information must be entered in the customer database for fulfillment.
2. Customer service representatives are also required to handle basic travel information referrals and questions.
  - Travel Oregon will provide initial training and on-going training as needed with any changes to current programs. The selected vendor will be responsible for training new employees after the initial training and after any subsequent training that is performed.
  - The selected vendor will stay current with what's happening in Oregon relevant to the visitor experience by subscribing to e-newsletters related to travel, wineries, ski-

area updates, etc. and take the initiative to learn about the 7 different Oregon tourism regions.

3. Monitor and manage the inboxes [Info@TravelOregon.com](mailto:Info@TravelOregon.com) and [AskOregon@TravelOregon.com](mailto:AskOregon@TravelOregon.com). This includes responding to traveler inquiries, forwarding emails to Travel Oregon staff and responding to industry partner questions.

- **General Duties:**

1. Manage Travel Oregon's postage account, manage problem resolution and provide other management tasks necessary to the delivery of the required services. This includes managing any freight claims that may arise.
2. Open, code and sort all of the Travel Oregon general information mail and enter the requests into the customer database for fulfillment.
3. Accept literature requests via a data exchange application programming interface (API) from the Travel Oregon's WordPress-based website including name, address, telephone number, email address, areas of special interest, etc.
4. Ability to receive promotional items and fulfill same for special direct-mail or related projects on an as-needed basis.
  - Provide all office equipment and supplies, computer hardware and software, phone lines; e.g. software and equipment needed to perform bulk mail pre-sort process for mailing requests.
5. Coordinate all communication with mailing agencies and telephone company; and generally manage all office functions of the tourism fulfillment program. Any information that the bulk mailings require to be sent to USPS; problem resolution with UPS as needed to help resolve order shipping problems and managing the phone company relationship.

- **Staffing & Management**

1. Staff employed by the fulfillment contractor perform all work duties in the program and occasionally could involve more than a normal 40-hour work week.
  - Travel Oregon will provide a monthly forecast to the selected provider, or last year's shipment details, to allow the selected provider to staff accordingly during peak periods.
2. The proposer works closely with Travel Oregon staff to coordinate supplemental staffing when required.

## **Qualifications**

The proposal should summarize the agency's range of relevant experience and capabilities in fulfillment services as outlined above. Each proposal should also demonstrate how the agency meets the following minimum qualifications:

1. Have a minimum of five years' combined experience in the following areas: guide distribution (both individual and bulk); customer service via phone and e-mail and mail distribution strategy.
2. Provide no less than three professional references that provide details about the firm's experience, expertise, and performance.
3. Provide on company letterhead responses to the following questions, showing the agency's ability to carry out the minimum service requirements of this work.

## **Conflict of Interest**

Proposal should identify any relationships that could potentially be considered a conflict of interest.

## **Budget**

The proposal must include a detailed annual budget for all phases and services provided to complete the Deliverables. See Section II, for details to include in budget.

## **Application Format**

OTC preference is electronic receipt of materials in PDF format. IT IS INCUMBENT ON THE APPLICANT TO ENSURE ALL REQUIRED PROPOSAL MATERIALS ARE SUBMITTED.

Please note that Oregon Tourism Commission, dba Travel Oregon is an agency of the State of Oregon and any materials or inquiry made relative to this RFP will be treated as unclassified and subject to federal Freedom of Information Act and Oregon public record laws. See *Confidentiality* below.

Submit electronic application materials to: [rfp@traveloregon.com](mailto:rfp@traveloregon.com)

Subject line: Fulfillment Services Application

## **Incomplete Applications Materials**

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

## **General Information**

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

All applicants requesting to contract for the **Fulfillment Services** will be required to complete a proposal and submit materials. Proposals including all Addenda and attachments are available through OTC website, or by contacting the OTC, see the contact information listed on page 2.

OTC shall publish any questions and responses as well as advertise all Addenda on OTC's website at <http://industry.traveloregon.com/organization/job-opportunities/>. Applicant is solely responsible for checking OTC's website to determine whether any Addenda have been issued. Addenda are incorporated into the RFP by this reference.

Once completed Proposal materials are received, OTC will process proposal materials, determine if any applicants are qualified to provide services, and, if the applicant is selected, execute an effective contract. The turnaround timeframe is subject to change based on workload and solely at discretion of OTC.

Each successful applicant awarded a contract under this RFP will be required to enter into a new agreement or amendment to an existing agreement approximately every 2 years and will be subject to re-evaluation. Submission of a proposal, materials, or prior contracting for the **Fulfillment Services** does not guarantee that an applicant will receive a contract.

OTC reserves the right to extend the awarded contract into a term longer than 2 years if deemed necessary.

### **Proposal Process**

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

OTC reserves the right to award a contract based solely upon information submitted. OTC may also choose to request additional information or to conduct interviews to provide clarification or answer questions OTC may have in conjunction with the written responses to this request.

At any point, OTC may decide that an applicant's response to any one or more of the proposal questions in **Form B** of this RFP or as provided in materials submitted by applicant is sufficiently inadequate, so-as-to, disqualify the Applicant from providing services. OTC may withdraw, re-open, or otherwise amend the RFP at any time, and to reject any or all proposals and materials, in whole or in part, when OTC determines that it is in its best interest to do so.

An evaluation committee that consists of OTC staff and Stakeholder(s) will review each proposal and submitted materials and determine if the applicant is qualified to perform the desired services. OTC reserves the right to consider as part of the evaluation verification of references, feedback from the evaluation committee, previous performance and financial stability as these areas relate to the performance of duties under any contract resulting from this proposal.

Upon award of a contract, the Contractor will be placed on a list of approved contractors for the **Fulfillment Services**. An awarded contract does not automatically authorize services or guarantee referrals.

All services must be provided in accordance with the specifications and requirements of an awarded contract between the Contractor and OTC. A copy of the specifications and requirements may be obtained by contacting the issuing office identified above. Applicant must agree to abide by the guidelines set forth in an awarded contract and these RFP materials.

OTC may request services to be performed by an awarded Contractor with issuance of a written Notice-to-Proceed or similar work authorization document.

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

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

**Review Process**

The proposals received in accordance with the RFP directions will be reviewed and ranked by the evaluation committee for their consideration and designation. In particular, the evaluation committee intends to consider the following when awarding the project for this RFP:

- Proposal contains sufficient information to complete all of the requirements identified in the RFP.
- Proposal demonstrates the ability, capacity, and skill of the Applicant to complete and operate the Project.
- Proposal demonstrates feasible timeline for project completion.
- Proposal compares favorably with others submitted on cost per level of services.
- Proposal demonstrates creative/innovative thinking in project design intended to reduce construction and operating costs, while serving the needs of the RFP.
- Proposal follows recommendations from a related literature review compiled by Travel Oregon

**Scoring Matrix**

<b><u>Evaluation Criteria</u></b>	<b><u>Scale</u></b>	<b><u>Percentage Weighting</u></b>
Completeness of Submission	Complete / Incomplete	Pass / Fail
Approach	1-10	40%
Core Experience	1-10	25%
Key Personnel	1-10	10%
Budget	1-10	25%

**Tentative Timeframe**

The deadline for proposals is 03/03/2025, 5 p.m. PT. Applicants will be notified within 6 weeks of proposal due date as it pertains to next steps in this process. This tentative schedule may be altered at any time at the discretion of OTC. OTC reserves the right to reject any and all proposals, or any part thereof, and accept the proposal that best meets the needs of OTC. All submitted documentation and completed work become the property of OTC.

RFP Published	02/03/2025
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Q&A Period	02/03/2025 – 02/21/2025
Proposal due	03/03/2025 5:00 p.m. PT
Evaluation period	03/04/2025 - 03/22/2025
Interview period	03/24/2025 - 03/28/2025
Notice of intent to award contract	04/01/2025

**Services and Rates**

Contracted services require authorization through a written, executed contract that specifies types, amounts and durations of services to be provided prior to work commencing. OTC will not reimburse for services outside the scope of the contract or for work completed without prior OTC authorization.

OTC will pay a Contractor for any services listed in the resulting contract at approved-upon rates. OTC reserves the right to negotiate rates and consideration with an applicant prior to an awarded contract. If OTC and applicant cannot agree upon consideration, a contract will not be issued to the applicant.

**Fully Executed Agreement**

Work under an awarded contract CANNOT begin until OTC has a fully executed contract. Any successful contractor shall complete only the specific services identified and authorized in writing (e-mail acceptable) by OTC's Contract Administrator or designee. The contract Statement of Work (or the “WORK”) will outline approved details such as location and services to be performed.

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

OTC will not compensate a Contractor for any services provided by the Contractor in excess of \$10,000 prior to a contract being fully executed. In addition, Contractors will not be paid for services which exceed the maximum amount not-to-exceed of approved services.

**Other Contract Responsibilities**

All Contractors will be expected to participate in OTC’s business meetings pertaining to a contract as requested. This is considered the best practice for business. Business meetings may include participation in conference calls, videoconference, Quality Assurance Surveys, and monitoring activities that OTC may require.

**Insurance Requirements**

Prior to execution of any contract, a Contractor must provide proof of current insurance coverage for an awarded contract as required by OTC. A Contractor must maintain the required insurance coverage throughout the duration of an awarded contract. The standard insurance requirements are indicated in Exhibit B of Contract. Insurance requirements may be negotiated based on the risk level of an awarded contract. Contractor shall provide copies of insurance certificate(s) as part of this application.

**Confidentiality**

OTC is a semi-independent agency of the State of Oregon. It is understood that proposals may contain confidential information relating to a previous client strategies, goals, and results. Any materials submitted to Travel Oregon, including proposals, documents, correspondence, or other materials, may be subject to Oregon Public Records Law. Proposals and accompanying materials submitted will also be reviewed by the evaluation committee. OTC cannot guarantee confidentiality of any materials received. Whether documents or any portion of a document submitted as part of a proposal may be exempt from disclosure may depend upon official or judicial determinations made pursuant to the Public Records Law. As a result, proposers are

advised to consult with legal counsel regarding disclosure issues. If there are any elements of application materials that the applicant or respondent believes are exempt from Oregon public records law, applicant must identify those materials or elements of application they believe to be exempt and provide a brief explanation. Please be advised that applicant identification of materials, in whole or in part, as exempt from Oregon public records law does not ensure materials will be treated as exempt or supersede official or judicial determination.

**Other Considerations**

**Material Rights/Ownership:** Materials developed and produced by contractors pursuant to the Fulfillment Services identified here or as a result of contracting with OTC is directly owned by OTC. Materials may not be repurposed or republished by Contractor, their employees, or sub-contractors in whole or in part without expressed written consent from OTC.

**Acceptance/Rejection of Proposals:** OTC reserves the right, at its sole discretion, to reject any application proposals or materials received that do not meet the stated criteria or include the required elements identified in this document to the satisfaction of OTC.

**RFP Questions/Clarifications:** Questions regarding the RFP process must be emailed to [rfp@traveloregon.com](mailto:rfp@traveloregon.com). All posed questions and OTC responses will be published to <http://industry.traveloregon.com/organization/job-opportunities/>.

**Cost for Preparation of Proposals:** OTC is not responsible under any circumstances for any costs incurred as the result of the preparation or submission of the respondent's proposals.

**Equal Opportunity:** OTC encourages entities, COBID certified or otherwise, minority and women-owned businesses to submit proposals in response to this RFP. Oregon companies and entities are strongly preferred.

## SECTION II: REQUIREMENTS FOR FULFILLMENT SERVICES PROPOSAL MATERIALS

### **Applicant Materials Submittal Requirements**

An applicant will not receive a contract award under this RFP unless the evaluation committee and OTC determine that the applicant meets the requirements described in Section I of this RFP and demonstrates to the evaluation committee and OTC's satisfaction that the applicant can perform the proposed services. Applicant's ability to perform the proposed services to the satisfaction of the evaluation committee and OTC will be assessed based on the responses provided by the applicant as identified in Section III of this RFP.

All materials must be received no later than 5:00 p.m. PT, 03/03/2025 to be considered. All proposals and accompanying materials must be submitted in electronic form via email. Time of receipt will be determined by OTC and will be finalized when material is received by OTC.

## SECTION III: PROPOSAL QUALIFICATIONS, WORK SAMPLES & SERVICES

### SUPPLEMENTAL QUESTIONS AND REQUIRED MATERIALS FOR FULFILLMENT SERVICES APPLICATIONS

In order to be considered for selection and possible service agreement, each proposal must be complete and include the following items. The weighting given to each of these items in our initial review of the written proposals is indicated alongside each item as a percentage, e.g. 10%. Items without a corresponding percentage are nonetheless required.

1. Cover Letter (*should not exceed one page*)

A dated cover letter describing the proposer's background, clients, experience and specific areas of expertise in relation to the scope of work outlined above. Include number of years in business and scope of general services provided to clients. The letter must be signed by Applicant.

2. Approach (*40%, should not exceed eight pages*)

Given what you know about this project from the information provided and referenced in this document, please briefly outline how you would approach the contract, with reference to the required Project Scope and Qualifications detailed above. Be sure to address the following points:

a. How do you stay current with fulfillment trends (new shipping methods, AI, sustainable practices, print on demand, shifts in consumer behavior, etc.)?

b. Describe the type of software system and database that would be utilized to accept and process requests from Travel Oregon's guide order form-

c. Describe your document requirements for receiving products and your standard for inbound inspection process.

d. Describe how you provide inventory management reporting and real-time inventory availability-

e. Describe the type of customer service you currently provide and how you see customer service as an important part of what Travel Oregon offers to travelers and industry partners

3. Core Experience (*25%, should not exceed five pages*)

Please describe, in detail, the proposer's background, experience and specific areas of expertise in relation to the following:

a. Please describe any other similar work you do or have done in the past.

b. Please describe how you would keep Travel Oregon informed of any issues that arise whether they were within your control or not.

c. What processes you have in place to ensure long-term account stability, including plans for staff transitions and onboarding.

4. Experience of Key Personnel (*10%, should not exceed two pages*)

Provide a brief professional bio/resume for the person/personnel who will be assigned to the contract, including any subcontractors. Principal(s), project manager(s) and/or technical staff must be identified. Discuss their roles in relation to the work required.

5. References (*should not exceed one page*)

Using Form D, provide a list of *at least* three business references for which the proposer has provided similar services. Include a contact name and phone number for each reference.

6. Budget (25%, *should not exceed one page*)

Using Form B as a guide, please outline in detail how you would allocate the budget for this project. Please outline and include all anticipated fees and expenses and provide a breakdown of key projects, initiatives and staffing requirements.

- a. Based on Appendix A and B please provide a pro forma invoice.
- b. Outline fees and/or hourly rates for personnel who will be assigned to the Travel Oregon account. Identify any incidental reimbursable fees or expenses.
- c. Please explain the billing and cost-accountability systems.
- d. List any cost savings and/or added value proposals offered.
- e. Describe your billing protocol for charging a customer for mistakes made on the vendor end.

7. Commitment to Diversity, Equity and Inclusion (*should not exceed two pages*)

Please explain how your agency is committed to the values of sustainability and equity and how your employees live up to these values? Please share any examples of how your employees work to uplift and serve the communities that they live in.

SECTION III: PROPOSAL FORMS AND EXHIBITS

**FORM A  
STATE OF OREGON  
OREGON TOURISM COMMISSION  
FULFILMENT SERVICES PROPOSAL  
COVER SHEET**

The State of Oregon, acting by and through its Oregon Tourism Commission (OTC), referred to herein as the OTC, issues this Proposal for Advertising Agency.

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

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

2. Primary Contact Person: \_\_\_\_\_ Title: \_\_\_\_\_

3. Business Address:

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

4. Mailing Address (if different than above):

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

5. Telephone#: \_\_\_\_\_ Fax#: \_\_\_\_\_

6. E-mail Address: \_\_\_\_\_

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

Name: \_\_\_\_\_ Title: \_\_\_\_\_

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

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

I certify that, to the best of its knowledge, there exists no actual or potential conflict between the business or economic interests of Applicants, its employees, or its agents, on the one hand, and the business or

economic interests of the State, on the other hand, arising out of, or relating in any way to, the subject matter of the RFP. Applicant shall provide prompt written notification to the State of any change occurring with respect to Applicant's business or interests which is reasonably likely to result in (or has resulted in) an actual or potential conflict between the business or economic interests of the Applicant and those of the State, arising out of, or relating in any way to, the subject matter of the RFP.

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

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

Authorized Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Printed Name: \_\_\_\_\_ Title: \_\_\_\_\_

**FORM B  
SERVICE RATES**

The Applicant agrees that the rates charged to OTC for services shall not exceed the Applicant’s normal and customary rates for comparable services.

**Please include your all-inclusive hourly rates for services and employees who will provide work on this project, including meetings, consultation, presentations including any expenses. If there are different rates for one type of work or another, please add additional information as appropriate:**

<b>Category</b>	<b>Price Type</b>	<b>Rate</b>	<b>Monthly Estimated Total</b>
<b>Account Management and Call Center</b>			
	Account Management		
	800 Number Usage- Minutes		
	800 Number Monthly Fee		
	Magento Hosting Fee		
<b>Inquiry &amp; Bulk Fulfillment</b>			
	Order Imports (Any charges that apply to importing orders from Travel Oregon’s system Magento)		
	Order Processing (Includes address validation)		
	Unit Picking		
	Carton Picking		
	Manual Order Entry		
	International Paperwork		
	Return Processing		
	Pre-Sort Order Processing		
	Print Address Sheet- Pre Sort		
	Palletize (applies to presort orders)		
	USPS Deliveries (applies to presort orders)		
	Order Processing (includes address validation, printing pack-slips, printing and affixation of label to carton.)		
<b>Warehouse Services</b>	Receiving		
	Storage		



<b>Special Projects</b>			
	<i>Special Projects &amp; Distribution</i> (includes tradeshow coordination/shipment and special projects for Global Sales and Welcome Centers)		
	Order Processing		
	International Paperwork		
<b>Freight &amp; Misc.</b>	USPS Charges		
	Other Freight Charges		
	Materials Purchased		
	Service Accessorials		
	Supply Accessorials		

OTC reserves the right to negotiate rates prior to an awarded contract. If the OTC and Contractor cannot agree upon an hourly rate, OTC may determine not to issue a contract to the Contractor or may impose additional restrictions relative to services identified in Contract Statement of Work.

**FORM C**  
**DECLARATION of COMPLIANCE with TAX LAWS**

I, (Authorized Agent of Applicant), representing \_\_\_\_\_ (hereafter “Applicant”), hereby declare and say:

1. I am an authorized agent of the Applicant, and I have full authority from the Applicant to submit this declaration and accept the responsibilities stated herein.
2. I have knowledge regarding Applicant’s payment of taxes, and to the best of my knowledge, Applicant is not in violation of any Oregon tax laws, including, without limitation, ORS 305.620 and ORS chapters 316, 317 and 318.
3. Applicant shall provide written notice to OTC within two business days of any change to the Applicant’s status of tax law compliance.

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

\_\_\_\_\_ Date: \_\_\_\_\_  
Authorized Agent’s Signature

**FORM D**  
**ANTI-DISCRIMINATION CERTIFICATION**

By my signature, I certify that I am authorized to act on behalf of Applicant in this matter and that, pursuant to ORS 279A.110, Applicant has not discriminated and will not discriminate against a subcontractor in awarding a subcontract because the subcontractor is a disadvantaged business enterprise, a minority-owned business, a woman-owned business, a business that a service-disabled veteran owns or an emerging small business.

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

\_\_\_\_\_  
Authorized Agent's Signature

Date: \_\_\_\_\_

**FORM E**  
**CERTIFICATION OF DISADVANTAGED BUSINESS**

Applicant certifies that it [*check one*] **is** \_\_\_ **is not** \_\_\_ certified by the Certification Office for Business Inclusion and Diversity (COBID) under ORS 200.055 as 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. If Applicant is COBID-certified, it further certifies that Applicant is certified by COBID as [*check all that apply*]:

- A disadvantaged business enterprise \_\_\_\_\_
- A minority-owned business \_\_\_\_\_
- A woman-owned business \_\_\_\_\_
- A business that a service-disabled veteran owns \_\_\_\_\_
- An emerging small business \_\_\_\_\_
- A B-Corp business \_\_\_\_\_

If OTC awards a contract to Applicant, Applicant certifies that it will provide the name(s) of any subcontractor(s) that Applicant intends to utilize in the performance of this contract that is certified by COBID under ORS 200.055 as 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.

If applicant is not COBID certified but would like to **self-certify** as 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 please do so. [*check all that apply*]:

- A disadvantaged business enterprise \_\_\_\_\_
- A minority-owned business \_\_\_\_\_
- A woman-owned business \_\_\_\_\_
- A business that a service-disabled veteran owns \_\_\_\_\_
- An emerging small business \_\_\_\_\_
- A B-Corp business \_\_\_\_\_

**FORM F**

## REFERENCES

Please include at least 3 references from current or former clients for similar projects performed in order of most recent experience. References must verify the quality of previous, related Work. This may include references from the tribal community.

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

### Reference 1

Applicant's Name: \_\_\_\_\_

Reference Entity: \_\_\_\_\_

Reference Contact Name: \_\_\_\_\_

Relationship to Proposer: \_\_\_\_\_

Contact Telephone Number:\_\_\_\_\_

Contact Email Address: \_\_\_\_\_

Services Provided: \_\_\_\_\_

Service Dates: \_\_\_\_\_ to \_\_\_\_\_

### Reference 2

Proposer Name: \_\_\_\_\_

Reference Entity: \_\_\_\_\_

Reference Contact Name: \_\_\_\_\_

Relationship to Proposer: \_\_\_\_\_

Contact Telephone Number:\_\_\_\_\_

Contact Email Address: \_\_\_\_\_

Services Provided: \_\_\_\_\_

Service Dates: \_\_\_\_\_ to \_\_\_\_\_

### Reference 3

Proposer Name: \_\_\_\_\_

Reference Entity: \_\_\_\_\_

Reference Contact Name: \_\_\_\_\_

Relationship to Proposer: \_\_\_\_\_

Contact Telephone Number: \_\_\_\_\_

Contact Email Address: \_\_\_\_\_

Services Provided: \_\_\_\_\_

Service Dates: \_\_\_\_\_ to \_\_\_\_\_

**EXHIBIT A**  
**STANDARD INSURANCE REQUIREMENTS**

Contractor shall obtain at Contractor's expense the insurance specified in Contract prior to performing services under contract and shall maintain it in full force and at its own expense throughout the duration of the Contract, as required by any extended reporting period or tail coverage requirements, and all warranty periods that apply. Contractor shall obtain the following insurance from insurance companies or entities that are authorized to transact the business of insurance and issue coverage in State and that are acceptable to OTC. Coverage shall be primary and non-contributory with any other insurance and self-insurance, with the exception of Professional Liability and Workers' Compensation. Contractor shall pay for all deductibles, self-insured retention, and self-insurance, if any.

OTC reserves the right to negotiate insurance limits prior to award based on the level of risk of the contract.

**a. WORKERS COMPENSATION.**

All employers, including Contractor, that employ subject workers, as defined in ORS 656.027, shall comply with ORS 656.017, and shall provide workers' compensation insurance coverage for those workers, unless they meet the requirement for an exemption under ORS 656.126(2). Contractor shall require and ensure that each of its subcontractors complies with these requirements. If Contractor is a subject employer, as defined in ORS 656.023, Contractor shall also obtain employers' liability insurance coverage with limits not less than \$500,000 each accident. Out-of-state employers, including Contractor, shall provide workers' compensation insurance coverage for their employees as required by applicable workers' compensation laws including employers' liability insurance coverage with limits not less than \$500,000 and shall require and ensure that each of its out-of-state subcontractors complies with these requirements.

**b. PROFESSIONAL LIABILITY**

**Required**     **Not required**

**Professional Liability insurance** covering any damages caused by an error, omission or any negligent acts related to the services to be provided under this Contract by the Contractor and Contractor's subcontractors, agents, officers, or employees in an amount not less than \$1,000,000.00 per occurrence. Annual aggregate limit shall not be less than \$2,000,000.00. If coverage is on a claims made basis, then either an extended reporting period of not less than 24 months shall be included in the Professional Liability insurance coverage, or the Contractor shall provide Tail Coverage as stated below.

**c. COMMERCIAL GENERAL LIABILITY.**

**Required**     **Not required**

Commercial General Liability Insurance covering bodily injury and property damage in a form and with coverage that are satisfactory to the State. This insurance shall include personal and advertising injury liability, products and completed operations, and contractual liability coverage for the indemnity provided under this contract. Coverage shall be written on an occurrence basis in an

amount of not less than \$1,000,000.00 per occurrence. Annual aggregate limit shall not be less than \$2,000,000.00.

d. AUTOMOBILE Liability Insurance: Automobile Liability.

**Required**    **Not required**

Automobile Liability Insurance covering Contractor's business use including coverage for all owned, non-owned, or hired vehicles with a combined single limit of not less than \$1,000,000.00 for bodily injury and property damage. This coverage may be written in combination with the Commercial General Liability Insurance (with separate limits for Commercial General Liability and Automobile Liability). Use of personal automobile liability insurance coverage may be acceptable if evidence that the policy includes a business use endorsement is provided.

e. POLLUTION LIABILITY.

**Required by OTC**    **Not required by OTC.**

f. EXCESS/UMBRELLA INSURANCE.

A combination of primary and excess/umbrella insurance may be used to meet the required limits of insurance.

**ADDITIONAL INSURED.** The Commercial General Liability insurance and Automobile liability insurance required under this Contract must include an additional insured endorsement specifying the State of Oregon, its officers, employees and agents as Additional Insureds, including additional insured status with respect to liability arising out of ongoing operations and completed operations, but only with respect to Contractor's activities to be performed under this Contract. Coverage shall be primary and non-contributory with any other insurance and self-insurance. The Additional Insured endorsement with respect to liability arising out of your ongoing operations must be on ISO Form CG 20 10 07 04 or equivalent and the Additional Insured endorsement with respect to completed operations must be on ISO form CG 20 37 04 13 or equivalent.

**"TAIL" COVERAGE.** If any of the required insurance is on a claims made basis and does not include an extended reporting period of at least 24 months, Contractor shall maintain either tail coverage or continuous claims made liability coverage, provided the effective date of the continuous claims made coverage is on or before the effective date of this Contract, for a minimum of 24 months following the later of (i) Contractor's completion and OTC's acceptance of all Services required under this Contract, or, (ii) OTC or Contractor termination of contract, or, (iii) The expiration of all warranty periods provided under this Contract.

**CERTIFICATE(S) AND PROOF OF INSURANCE.**

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



**NOTICE OF CHANGE OR CANCELLATION:**

The contractor or its insurer must provide at least 30 days' written notice to OTC before cancellation of, material change to, potential exhaustion of aggregate limits of, or non-renewal of the required insurance coverage(s).

**INSURANCE REQUIREMENT REVIEW:**

Contractor agrees to periodic review of insurance requirements by OTC under this agreement and to provide updated requirements as mutually agreed upon by Contractor and OTC.

**STATE ACCEPTANCE:**

All insurance providers are subject to OTC acceptance. If requested by OTC, Contractor shall provide complete copies of insurance policies, endorsements, self-insurance documents and related insurance documents to OTC's representatives responsible for verification of the insurance coverages required under this Section 4.

**EXHIBIT B  
CHECKLIST  
(FOR APPLICANTS OPTIONAL USE)**

All forms listed in the Section are required to be submitted for consideration of an application.

- q Form A: Application Cover Sheet
- Form B: Services Rates
- Form C: Declaration of Compliance with Tax Laws
- Form D: Anti-discrimination Certification
- Form E: Certification of Disadvantaged Business
- Form F: References
- Proof of Insurance
- Appendix A – Travel Oregon Metrics
- Appendix B – Supplemental Metrics
- Appendix C - Supplemental Questions

**Checklist Disclaimer**

This checklist is provided only as a courtesy to prospective Applicant. OTC makes no representation as to the completeness or accuracy of any Checklist. Prospective Applicant is solely responsible for reviewing and understanding the RFP and complying with all the requirements of this RFP, whether listed in a checklist or not. Neither the State nor OTC is liable for any claims, or subject to any defenses, asserted by Applicant based upon, resulting from, or related to, Proposer's failure to comprehend all requirements of this RFP.

**Note: Incomplete Applications**

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

## APPENDIX A

### Travel Oregon Business Characteristics and Metrics

#### General

Projected start date for outsourcing: July 1, 2025

Product Classification - % by type

Brochures/Publications: 95%

Other (Mixed collateral): 5%

Travel Oregon receives requests for literature from the following sources:

Email, phone, unsolicited mail, website and other sources.

Projected Growth of Business for the next 5 year period is projected at 5% per year

Turn time for processing requests/orders: 2 business day max turnaround

Peak literature request volume is the months: January and March through July

Hours of operation required for Literature Requests: 24 hours; IVR or voice messaging after regular business hours is acceptable.

**Hours of operation required for Customer Service: 8:00 a.m.-5:00 p.m. Mon-Fri. PST**

## **Fulfillment**

Number of SKU's:

Active: 52

Inactive: N/A

Number of Boxes per Pallet

Average: 68

Range: 39-68

Number of Pallets

Average: 179

Peak: 237

Current provider space utilized is approximately: ~2,500 sq. ft.

Annual number of Individual orders in 2024: 58,159

Average lines/units per Individual presort order: ~1.7

Average lines/units per individual TORP order: 6 (this can range from 2 –11 items)

Annual number of Bulk orders in 2024: 836

Average lines per Bulk order: 1.8

Average units per Bulk order: ~Case quantities range from 36 to 300 units.

Estimated number of receiving's and frequency:

Total number of receipts in 2024: 16

Average receipts per month: 1.3

Average number of SKUs per receipt: 2

Average quantity per receipt: 27,180

Inbound %

Air: None

Parcel: 28.1%

LTL: 59.4%

TL: 12.5%

Storage requirements:

Average number of pallets on hand by month for 2024: 213

Frequency of Physical Wall to Wall Inventories: 1 annual

Some value added services (VAS) will be needed on a project by project basis.

Number of characters per item number and type: Alpha & Numeric (ex: 2017-VISITOR-GUIDE-ECL).

## **Shipping**

Average shipments per request:

Individual Presort: 1.6

Individual TORP: 1

Bulk: 1

Average weight per shipment individual:

Travel Oregon Regional Pack (TORP): 2.63 pounds  
Presort: less than 1 pound

Average weight per shipment Bulk: 80 pounds

Total domestic (United States & Canada) shipments in 2024:

Individual: 58,159  
Bulk: 804

Number of domestic shipments by month for 2024:

Individual:

Jan 7,755 Feb 4,313 Mar 3,131 Apr 2,993 May 11,894 Jun 9,104  
Jul 2,314 Aug 3,606 Sep 3,553 Oct 2,901 Nov 2,187 Dec 4,408

Bulk:

Jan 74 Feb 42 Mar 45 Apr 141 May 90 Jun 85  
Jul 103 Aug 72 Sep 54 Oct 44 Nov 31 Dec 23

Individual Shipment Volume by State/Province

**United States** OR 17897 CA 7559 WA 5132 TX 2040 ID 1765 IL 1680 AZ 1563 FL 1154 MN 989 CO 955 WI 910 NV 850 OH 829 MO 781 MI 753 PA 708 IN 661 NY 633 UT 581 NC 558 IA 489 GA 483 VA 426 TN 407 MT 406 KS 373 OK 341 NJ 329 KY 312 LA 294 MD 286 SC 268 HI 255 NE 251 AR 244 MA 221 AL 217 NM 195 CT 158 SD 137 WY 134 AK 132 MS 131 WV 104 ND 96 NH 85 ME 76 DE 65 VT 43 RI 36 DC 16

**Canada** BC 1769 AB 306 ON 219 QC 134 MB 47 SK 41 NS 13 YN 7 NB 5 NL 4 NT 2 YT 1 PE 1

Bulk Shipment Volume by State/Province:

**United States** OR 625 WA 24 CA 24 OH 23 PA 18 ID 9 VA 7 IN 7 CO 6 NY 4 MO 4 LA 4 NE 3 NC 3 MT 3 MN 3 AZ 3 AL 3 OK 2 NV 2 MI 2 KY 2 IL 2 FL 2 WV 1 WI 1 TX 1 TN 1 NJ 1 ME 1 IA 1 DE 1 CT 1  
**Canada** BC 5 ON 2 AB 2 QC 1

Domestic shipping methods used and % of each type

Inquiry:

USPS Standard Pre-Sort Only: 62.3%  
USPS Standard First Class: 9.1%  
USPS Priority Mail: 28.6%

Bulk:

UPS: 98.2%  
Will Call: 0.03%  
LTL: 1.04%  
Courier: 0.73%

International Shipments: Yes

Number of International shipments, excluding Canada, in 2024: 10

International shipping methods used and % of each type

Individual:

UPS: 100%

Other: 0%

Bulk:

UPS: 100%

Other: 0%

### **Service Level Requirements**

The following list is representative of the type service standards expected to be met.

- Answer 90% of incoming calls within 20 seconds
- Maintain less than 2% abandon rate in call center
- At least 99.8% accuracy in shipments as measured at the unit level
- All stock put-away from receiving within 24 hours of receipt
- All mail/fax requests entered 1 business day
- All requests will be filled and shipped within 2 business days
- Meet customer RUSH guarantees 100% of the time
- Inventory accuracy to be maintained at least the 99.8% level

## **APPENDIX B – CUSTOMER SERVICE DATA (Phone and E-mail)**

**Call Volume:** Call volume (in minutes) is approximately 5,771 minutes (2024).

In 2023, total call minutes were 6,391 minutes.

### **E-mail Volume:**

The current vendor manages customer inquiries as part of its overall program management program.

- From 12/20/22 to 12/19/23, the current vendor responded to 906 emails.
- From 12/20/23 to 12/19/24, the vendor responded to 1,017 emails.

Time spent on email varied from a few minutes (when boiler plate responses from our library was used) to about an hour or more for more complex or nuanced responses.