



**REQUEST FOR PROPOSAL  
20-03**

**LOGISTICS AND INTERMODAL CONFERENCE PLANNER  
FOR THE  
JACKSONVILLE PORT AUTHORITY**

**Return responses no later than,  
TUESDAY, FEBRUARY 18, 2020 by 2:00 PM EST  
to the attention:**

**Jacksonville Port Authority  
Procurement Services  
2831 Talleyrand Avenue  
Jacksonville, FL 32206-0005**

**RFP 20-03**  
**LOGISTICS AND INTERMODAL CONFERENCE PLANNER**  
**FOR THE**  
**JACKSONVILLE PORT AUTHORITY**

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**REQUESTS FOR DISTRIBUTION SHEETS OR  
PRE PROPOSAL ATTENDANCE SHEETS**

Copies of the Request for Proposal (RFP) distribution records may be requested by contacting Procurement Services.

**SUBMISSION OF PROPOSALS**

Proposals submitted in advance of the time set for opening will be delivered to Procurement Services, 2nd Floor, 2831 Talleyrand Avenue, Jacksonville Florida, 32206, until **2:00 PM EST**. Proposers are fully responsible for delivery of proposals. Reliance upon mail or public carrier is at proposer's risk. **Late proposals will not be opened or considered.**

**PROPOSAL OPENING PROCEDURES**

Depending on the type of project for which proposals are requested, the items read at the opening will vary. Sealed proposals are not public records subject to disclosure under the Florida Public Records Law until such time as the Jacksonville Port Authority provides notice of a decision or intended decision to award the contract or within thirty (30) days after opening, whichever is earlier (119.07 (3) (m), Florida Statutes). All parts of proposals, including exhibits, are subject to the Public Records Law, and a Proposer may not exclude any portion of the Proposal unless specifically exempted from disclosure by Florida Law. Exemption of financial statements applies only to required submittal for prequalification of bidders on public works projects.

**REQUESTS FOR PROPOSALS RESULTS OR AWARD OF CONTRACT**

Proposers desiring a copy of the unofficial tabulation sheet, which will contain only the items considered necessary by JAXPORT, must include a stamped, self-addressed envelope with their proposal. Proposers may request a copy be sent to them by facsimile, email or may obtain a copy after the Proposal opening in Procurement Services. Proposers wishing to view proposals submitted, subject to the above Public Records requirements, must arrange an appointment by contacting Public Records at (904) 357-3091 or [public.records@jaxport.com](mailto:public.records@jaxport.com). If copies are requested, an appropriate charge will be assessed, and all copies will be made solely at the convenience of JAXPORT. All Proposers will be notified of the intent to award the contract after action by the Jacksonville Port Authority Awards Committee.

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Proposals will be received by the Jacksonville Port Authority (JAXPORT) until **2:00PM(EST)**, on **TUESDAY, FEBRUARY 18, 2020**, at which time they will be opened in the First Floor Conference Room, 2831 Talleyrand Avenue, Jacksonville, Florida 32206.

All Proposals must be submitted in accordance with the Specifications of Proposal Number **20-03**, which may be obtained from our website:

<https://www.jaxport.com/procurement/active-solicitations/>

Procurement Services  
P.O. Box 3005  
Jacksonville, Florida 32206  
(904) 357-3455

# ARTICLE I INSTRUCTIONS TO PROPOSERS

## **1.01 GENERAL INFORMATION**

The Jacksonville Port Authority (JAXPORT) is soliciting proposals from “Qualified and Experienced Vendors” to provide **LOGISTICS AND INTERMODAL CONFERENCE PLANNER** services for the Jacksonville Port Authority. It is the intent of JAXPORT to select a vendor with extensive conference planning experience, with a desire to select a vendor specifically with “turnkey” experience planning large maritime or logistics conferences and with contacts within these industries to effectively solicit and attract registrants, industry speakers and major sponsors.

This event is held once every two years and the initial agreement for RFP 20-03 will be for the conference year 2021. At the sole discretion of JAXPORT, this agreement may be extended for up to two (2) additional two (2) year periods, based on vendor performance and adherence to prices, terms and conditions.

The company selected will be a vendor for this event. JAXPORT maintains sole ownership of this event and reserves the right to make all decisions regarding all facets of the conference.

## **1.02 RECEIPT AND OPENING OF PROPOSALS**

The Jacksonville Port Authority (JAXPORT) will receive Proposals until **TUESDAY, FEBRUARY 18, 2020 at 2:00 PM EST** from companies licensed, qualified and interested in providing services as the **LOGISTICS AND INTERMODAL CONFERENCE PLANNER** per the specifications listed in this RFP. These proposals will be publicly opened in the First Floor Conference Room, Jacksonville Port Authority, 2831 Talleyrand Avenue, Jacksonville, Florida, 32206 at the stated time and date listed above.

## **1.03 DELIVERY OF PROPOSALS**

Submit one (1) **original** (*with ink signatures*) and **four (4) copies** of the Proposal and all required supplemental material listed in Article III (*items to be submitted with Proposal Form*) must be submitted in a sealed package. The label on the package should read **“RFP 20-03 LOGISTICS AND INTERMODAL CONFERENCE PLANNER”** and addressed or delivered **ONLY** to:

**Jacksonville Port Authority  
Procurement Services  
Attn: Jerrie Gunder  
2831 Talleyrand Avenue  
Jacksonville, FL 32206**

Each Proposal package submitted must clearly show the Proposer's company name on the outside. Documents submitted through E-Builder, Email, or Fax, will not be accepted or considered. Any Proposals received after the above stated time and date will not be opened or considered. It is the sole responsibility of the Proposer to have its Proposal delivered to JAXPORT as specified herein on or before the above date and time. Reliance upon mail, public carrier or other delivery service is at Proposer's risk. All expenses for making Proposals to JAXPORT are to be borne by the Proposer and will not be borne, charged to or reimbursed by JAXPORT in any manner or under any circumstance.

## **1.04 CONTRACT DOCUMENTS**

The Contract Documents give the description of the work to be done under this Contract. The required qualifications of proposers, other technical information, applicable special conditions, term of the Contract and payment terms are also contained in these documents. The date, time and place of the receipt and opening of proposals are listed in Article 1.02 above.

## **1.05 EXAMINATION OF CONTRACT DOCUMENTS**

The Proposer is required to carefully examine the scope of the work and the Contract documents. It will be assumed that the Proposer has investigated and is fully informed of the conditions, the character, and quality of work to be performed, any materials and equipment to be furnished, and of the requirements of the Contract documents.

## **1.06 OBLIGATION OF PROPOSERS**

The Proposer must become fully aware of JAXPORT's requirements for the Contract. Failure to do so will not relieve a successful Proposer of its obligation to furnish the material, equipment and labor necessary to carry out the provisions of the Contract Documents and to complete the work at the prices proposed.

In addition, the Proposer will be held responsible for having examined the details of the proposed scope of work. The Proposer will use its personal knowledge and experience or professional advice as to the character of the proposed work and any other conditions surrounding and affecting the proposed work. The submittal of a Proposal will be construed as evidence that all Proposer obligations have been satisfied and no subsequent allowance will be made in this regard.

## **1.07 QUESTIONS & ADDENDA**

Any questions regarding this Request for Proposals (RFP) should be directed to **Jerrie Gunder, Contract Specialist** and submitted either by email only to [jerrie.gunder@jaxport.com](mailto:jerrie.gunder@jaxport.com) or submittal through E-Builder. Answers to questions will be released on an Addendum directed to all known prospective proposers registered in the E-Builder's website and advertised on our projects for bid website at <https://www.jaxport.com/procurement/active-solicitations/>

**The deadline for questions will be MONDAY, FEBRUARY 3, 2020 at 9:00 AM EST.**

No interpretation of the meaning of the specifications or other Contract Documents, or corrections of any apparent ambiguity, inconsistency or error therein, will be made to any Proposer orally. Any request for such interpretations or corrections must be made in writing to:

**Jacksonville Port Authority  
Procurement Services  
P.O. Box 3005  
Jacksonville, FL 32206-0005**

Any such request which is not received prior to the above deadline date for questions will not be considered. All such interpretations and supplemental instructions will be in the form of written Addendum to the Contract Documents, which if issued, will be e-mailed to all known prospective proposers. However, it is the responsibility of each Proposer, before submitting its Proposal, to contact Procurement Services at (904) 357-3455 to determine if any Addendums have been issued and to make such Addendums a part of its Proposal. Only the interpretation or correction so given by JAXPORT in writing will be binding, and prospective proposers are advised that only JAXPORT will give information concerning, or will explain or interpret the RFP Documents.

## **1.08 PREPARATION OF PROPOSAL**

- A. Proposal will be submitted with the attached Proposal Form (Article III). All blank spaces on the form must be typed or legibly printed in ink. Only the Proposal Form and applicable additional information should be submitted. **DO NOT SUBMIT ANY OTHER PORTIONS OF THE ORIGINAL JAXPORT PROPOSAL PACKAGE.**
- B. Proposals shall contain a biography of **no more than ten (10) pages** (excluding staff resumes, covers, required attachments and tab sheets) that highlights its staff and capabilities in sufficient detail to allow a reasonable evaluation of the relative capability of respondents to serve the particular needs of JAXPORT and each of the key areas of the proposal that summarizes the proposer's case as to why such proposal should be selected by JAXPORT. Text and figures shall be printed on one side of the 8½ by 11 paper only. Proposals should be prepared in the order of the evaluation criteria detailed in Article IV, 4.05 of the RFP, and tabs should be used to

separate and label the sections according to the criteria. Information included in a letter of transmittal may not be taken into consideration while reviewing proposals. Only specific project staff resumes (*2-page limit*) should be used. Resumes should not be included for staff that is not relevant to the project work.

- C. Included in the ten (10) pages limitation, proposals must contain an organizational chart and brief description of staff, as well as key staff of any outsourcing proposed.
- D. Clear statements of experience related to the scope of work should be included for the firm, its management and account lead proposed. A list of references should also be included. The list of references must include a contact person, phone number, email address and a brief description of services performed.
- E. A list of all outsourcing proposed that are an integral part of the proposal from a technical aspect must be included with detailed information as required in C and D above.
- F. An authorized representative shall sign the proposal. If an individual makes the Proposal, he or she must sign his or her name therein and state his or her address and the name and address of every other person interested in the Proposal as principal. If a firm or partnership makes the Proposal, the name and address of each member of the firm or partnership must be stated. If a corporation makes the Proposal, an authorized officer must sign the Proposal or agent, subscribing the name of the corporation with his or her own name and affixes the Corporate Seal. Such officer or agent must also state the name of the State, under which the corporation is chartered, and the names and business address of the President, Secretary and Treasurer. If applicable, also provide evidence of registration with the Secretary of State of the State of Florida for doing business in the State of Florida.
- G. Failure to submit all information requested will result in a proposal being considered “non-responsive,” and therefore will be rejected.

#### **1.09 RESPONSIBLE PROPOSER CRITERIA**

In considering the responsibility of Proposers, JAXPORT will examine the following factors. Evaluation Criteria should be submitted in sufficient detail to allow proper evaluation of all proposals.

- A. Proposed Rate/Fees (*30 Points Maximum Score*)
- B. Proposer’s Maritime or Logistics Event Planning Experience (*30 Points Maximum Score*)
- C. Proposer’s General Conference Planning Experience (*20 Points Maximum Score*)
- D. Experience of Account Lead Assigned to Coordinate JAXPORT’s Event (*20 Points Maximum Score*)

In this regard, JAXPORT reserves the right to reject any and all Proposals and to waive any non-conformance it received, whenever such rejection or waiver is in the best interest of JAXPORT.

***Failure to provide requested information listed above may result in the Proposer being ruled non responsive.***

#### **1.10 WITHDRAWAL OF PROPOSAL**

Any Proposal may be withdrawn by written request of the Proposer until the date and time set above for opening of the Proposals. Any Proposal not so withdrawn will, upon opening, constitute an irrevocable offer for ninety (90) days (or until one or more of the Proposals have been duly accepted by JAXPORT, whichever is earlier) to provide JAXPORT the services set forth in the attached specifications. JAXPORT action on Proposal normally will be taken within sixty (60) days of opening; however, no guarantee or representation is made as to the time between the proposal opening and the subsequent JAXPORT action.

#### **1.11 DISQUALIFICATIONS OF PROPOSERS**

Any of the following causes may be considered sufficient for the disqualification of a Proposer and rejection of the Proposal:

- A. Submission of more than one Proposal for the same work by an individual, firm, partnership or corporation under the same or different names. If a company has more than one division, only one Proposal may be submitted for the company.
- B. Evidence of collusion among Proposers.
- C. Incomplete work for which the Proposer is committed by contract which, in the judgment of JAXPORT, might hinder or prevent the Proposer with complying with the requested scope of services under this Contract if awarded to such Proposer.
- D. Being in arrears on any existing agreement with JAXPORT or having defaulted on a previous contract with JAXPORT. For purposes of this section, corporations, partnerships or companies, or firms or other business entities created for the purpose of shielding any individual, firm, Partnership Corporation, or other business entity from the application of this provision may be considered for disqualification.
- E. Items 'C' and 'D' above will be considered by JAXPORT after the opening of Proposals, and, if found to apply to any Proposer, JAXPORT will notify the Proposer that its Proposal will not be considered for an award of the Contract. The Proposer has five (5) business days to appeal in writing this decision to JAXPORT Chief Executive Officer, via Procurement Services, and the decision of the Chief Executive Officer will be final.
- F. Failure to provide the notarized forms, if any, required in the Proposal documents, and any other requirements listed in Article III.
- G. Failure to disclose any disciplinary actions taken or pending against the firm within the past three (3) years.

**Minor irregularities that do not materially affect the Proposal may be waived at the sole discretion of JAXPORT.**

#### **1.12 NON-WARRANTY OF RFP INFORMATION**

Due care and diligence has been exercised in the preparation of this RFP and all information contained herein is believed to be substantially correct. However, the responsibility for determining the full extent of the exposures to risk and verification of all information herein shall rest solely with those making proposals. JAXPORT and its representatives shall not be responsible for any error or omission in the RFP.

#### **1.13 CONTINGENCY FEES PROHIBITED**

By submitting a proposal in response to this RFP, the Proposer warrants that it has not employed or retained a company or person, other than a bona fide employee or sub proposer, working in its employ, any fee, commission, percentage, gift or other consideration contingent upon or resulting from the award of making a contract with JAXPORT.

#### **1.14 REJECTIONS OF IRREGULAR PROPOSALS**

Proposals will be considered irregular and may be rejected if they show omissions, alterations of form, additions not called for, conditions, limitations, unauthorized alternate proposals or other irregularities of any kind. JAXPORT reserves the right to waive any non-conformance or irregularities of proposals, or to reject any or all proposals, in whole or in part, whenever such non-conformance or irregularities are minor and such action is deemed to be in the best interest of JAXPORT.

In this regard, JAXPORT reserves the right to reject any and all Proposals, in whole or in part, and to waive any non-conformance or any other irregularities received in said proposal, to reject any and all request for proposals and to accept the proposal which in its judgment will be in the best interest of JAXPORT.



### **1.15 PUBLIC ENTITY CRIME**

Pursuant to Chapter 287 of the Florida Statutes, Proposers are required to complete and submit with their proposals a Sworn Statement Pursuant to Section 287.133 (3) (a), Florida Statutes, on Public Entity Crimes. **Form PEC is provided as “Exhibit B”** for that purpose and must be included with the proposal form at the time proposals are submitted.

A person or affiliate placed on the convicted vendor list following a conviction for a public entity crime is prohibited from doing any of the following for a period of 36 months from the date of being placed on the convicted vendor list:

- Submitting a proposal on a contract to provide any goods or services to a public entity;
- Submitting a proposal on a contract with a public entity for the construction or repair of a public building or public work;
- Submitting proposals on leases of real property to a public entity;
- Being awarded or performing work as a Proposer, supplier, sub Proposer, or Proposer under a contract with any public entity; and
- Transacting business with any public entity in excess of Category Two threshold amount (\$35,000) provided in section 287.017 of the Florida Statutes.

### **1.16 DISCRIMINATORY VENDOR LIST**

An entity or affiliate placed on the discriminatory vendor list pursuant to section 287.134 of the Florida Statutes may not:

- Submit a proposal on a contract to provide any goods or services to a public entity;
- Submit a proposal on a contract with a public entity for the construction or repair of a public building or public work;
- Submit proposals on leases of real property to a public entity;
- Be awarded or perform work as a contractor, supplier, or subcontractor under a contract with any public entity; or
- Transact business with any public entity.
- To view a current list, visit:

[http://www.dms.myflorida.com/business\\_operations/state\\_purchasing/vendor\\_information/convicted\\_suspended\\_discriminatory\\_complaints\\_vendor\\_lists](http://www.dms.myflorida.com/business_operations/state_purchasing/vendor_information/convicted_suspended_discriminatory_complaints_vendor_lists)

### **1.17 PROPOSERS REPRESENTATION AND AUTHORIZATION**

In submitting a proposal, each Proposer understands, represents, and acknowledges the following (if the Proposer cannot certify to any of the following, the Proposer shall submit with its response a written explanation of why it cannot do so).

- The Proposer is not currently under suspension or debarment by the State or any other governmental authority.
- To the best of the knowledge of the person signing the proposal documents, the Proposer, its affiliates, subsidiaries, directors, officers, and employees are not currently under investigation by any governmental authority and have not in the last ten (10) years been convicted or found liable for any act prohibited by law in any jurisdiction, involving conspiracy or collusion with respect to bidding on any public contract.
- Proposer currently has no delinquent obligations to the State, including a claim by the State for liquidated damages under any other contract.
- The proposal submission is made in good faith and not pursuant to any agreement or discussion with, or inducement from, any firm or person to submit a complementary or other noncompetitive response.
- The prices and amounts have been arrived at independently and without consultation, communication, or agreement with any other respondent or potential respondent; neither the prices nor amounts, actual or approximate, have been disclosed to any Proposer or potential Proposer, nor they will not be disclosed before the solicitation proposal opening.

- The Proposer has fully informed JAXPORT in writing of all convictions of the firm, its affiliates (as defined in section 287.133(1)(a) of the Florida Statutes), and all directors, officers, and employees of the firm and its affiliates for violation of state or federal antitrust laws with respect to a public contract for violation of any misrepresentation with respect to a public contract. This includes disclosure of the names of current employees who were convicted of contract crimes while in the employ of another company.
- The product(s) offered by the Proposer will conform to the specifications without exception.
- The Proposer has read and understands the Contract terms and conditions, and the submission is made in conformance with those terms and conditions.
- If an award is made to the Proposer, the Proposer agrees that it intends to be legally bound to the Contract that is formed with the JAXPORT.
- The Proposer has made a diligent inquiry of its employees and agents responsible for preparing, approving, or submitting the response, and has been advised by each of them that he or she has not participated in any communication, consultation, discussion, agreement, collusion, act or other conduct inconsistent with any of the statements and representations made in the response.
- The Proposer shall indemnify, defend, and hold harmless JAXPORT and its employees against any cost, damage, or expense which may be incurred or be caused by any error in the respondent's preparation of its proposal.
- All information provided by, and representations made by, the Proposer are material and important and will be relied upon by JAXPORT in awarding the Contract. Any misstatement shall be treated as fraudulent concealment from JAXPORT of the true facts relating to submission of the proposal. A misrepresentation shall be punishable under law, including, but not limited to, Chapter 817 of the Florida Statutes.
- That the Proposer has carefully examined the Scope of Services and that from his/her investigations has been satisfied as to the nature and location of the work, the kind and extent of the services needed for the performance of the work, the general and local conditions, all difficulties to be encountered, and all other items which in any way affect the work or its performance.
- That the Proposer is in full compliance with all Federal, State, and local laws and regulations and intends to fully comply with same during the entire term of the contract.

#### **1.18 E-VERIFY PROGRAM FOR EMPLOYMENT VERIFICATION**

Proposers are required to complete and submit with their proposals an E-Verify Acknowledgement and Acceptance Form. **Form is provided as "Exhibit C"**. The successful proposer agrees to utilize the U.S. Department of Homeland Security's E-Verify system to verify the employment eligibility of all new employees hired by the contractor during the term of this contract. Successful proposers must include in all subcontracts the requirement that subcontractors performing work or providing goods and services utilize the E-Verify system to verify the employment eligibility of all new employees hired by the subcontractor during the contract term. The successful proposer further agrees to maintain records of its participation and compliance and its subcontractor's participation and compliance with the provisions of the E-Verify program, and to make such records available to JAXPORT upon request. Failure to comply with this requirement will be considered a material breach of the contract.

#### **1.19 NON-DISCRIMINATION PROVISIONS**

The Proposer will have all state, county and local licenses and permits as may be required by law to perform the described services. The Proposer agrees to comply with all applicable Federal, State and local laws, including the Civil Rights Act 1964, as amended. The Equal Employment Opportunity Clause in Section 202 paragraph 1 through 7 of Executive Order 11246, as amended, relative to Equal Employment and the implementing Rules and Regulations of the Office of Federal Contract Compliance Programs are incorporated herein by specific reference. The Affirmative Action Clause in Section 503 of the Rehabilitation Act of 1973, as amended, relative to Equal Opportunity for the disabled is incorporated herein by specific reference.

The Affirmative Action Clause in 38 USC Section 2-12 of the Vietnam Veterans' Readjustment Assistance Act of 1974, relative to Equal Employment Opportunity for the special disabled veteran and veterans of the Vietnam Era, is incorporated herein by specific reference.

## **1.20 PUBLIC MEETING REQUIREMENTS**

JAXPORT is required to comply with Section 286.011 of the Florida Statutes. Therefore, Evaluation Committee meetings and meetings of the Awards Committee are required to be held in public with sufficient notice made of the time and date of the meeting. All notices of public meetings are posted in the lobby of the Jacksonville Port Authority, 2831 Talleyrand Avenue, Jacksonville, FL 32206.

## **1.21 PUBLIC RECORDS**

In accordance with Section 119.0701, Florida Statutes, the Contractor shall:

- (a) Keep and maintain public records required by the JAXPORT to perform the services; and
- (b) Upon request from the JAXPORT's custodian of public records, provide the JAXPORT with a copy of the requested records or allow records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided for in Chapter 119, Florida Statutes, or as otherwise provided by law; and
- (c) Ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law for the duration of the Contract term and following completion of this Contract if Contractor does not transfer the records to the JAXPORT; and
- (d) Upon completion of this Contract, transfer to the JAXPORT at no cost all public records in possession of Contractor or keep and maintain public records required by the JAXPORT to perform the service. If Contractor transfers all public records to the JAXPORT upon completion of this Contract, Contractor shall destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. If Contractor keeps and maintains public records upon completion of this Contract, Contractor shall meet all applicable requirements for retaining public records. All records stored electronically must be provided to the JAXPORT upon request from either JAXPORT's custodian of public records in a format that is compatible with the JAXPORT's information technology systems.

The above requirements apply to a "Contractor" as defined in Section, 119.0701, Florida Statutes.

IF CONTRACTOR HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE CONTRACTOR'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS CONTRACT, CONTACT THE JAXPORT'S CUSTODIAN OF PUBLIC RECORDS AT (904) 357-3091 [public.records@jaxport.com](mailto:public.records@jaxport.com); JACKSONVILLE PORT AUTHORITY, PUBLIC RECORDS REQUEST, 2831 TALLEYRAND AVENUE, JACKSONVILLE, FLORIDA 32206.

## **1.22 PROTEST PROCEDURES**

Respondents shall file any protest regarding this RFP in writing, in accordance with JAXPORT's Protest Procedures promulgated on SOP-1215 Procurement Code for the Jacksonville Port Authority, available at <https://www.jaxport.com/procurement>

## **1.23 EX-PARTE COMMUNICATION PROHIBITED**

JAXPORT believes that any ex-parte communication concerning the solicitation, evaluation, and selection process denies all firms submitting proposals fair, open, and impartial consideration. Adherence to procedures which ensure fairness is essential to the maintenance of public confidence in the value and soundness of the important process of public procurement of professional services. Therefore, during the solicitation, evaluation, and selection process, any ex-parte communication between a firm, its employees, agents, or representatives; and JAXPORT, its members, employees, agents, legal counsel, or representatives; other than JAXPORT's designated representative identified herein, is strictly prohibited. Failure to observe this requirement shall result in rejection of a firm's proposal. For purposes of this section,

the term “ex-parte communication” shall mean any oral or written communication relative to this solicitation, evaluation, and selection process, which occurs outside of an advertised public meeting, pursuant to Section 285.011, Florida Statutes. This requirement shall not prohibit:

- A. Meetings called or requested by JAXPORT and attended by Proposers/Firms for the purpose of discussing this solicitation, evaluation, and selection process, including, but not limited to, substantive aspects of this RFP;
- B. The addressing of any elected or appointed governing authority of JAXPORT at public meetings advertised and conducted pursuant to, and in compliance with, Section 285.011, Florida Statutes;
- C. The filing and prosecution of a written protest to any proposed award to be made pursuant to this solicitation, evaluation, and selection process, which filing and prosecution shall give notice to all firms. Protest proceedings shall be limited to open public meetings with no ex-parte communication outside those meetings;
- D. Contacts with elected officials of JAXPORT.

#### **1.24 EXECUTION OF THE CONTRACT**

Within twenty (20) days after Notice of Award, the successful Proposer will furnish the required certificates of insurance and any other requirements and enter into a formal agreement with JAXPORT. Failure to execute the Agreement as provided in these documents within twenty (20) days from the date of Notice of Award may be just cause, unless such failure has been caused by JAXPORT, for JAXPORT to annul and void the award. Award may then be made to another Proposer, or the contract may be re-advertised, as in the best interest of both entities. No award will be binding upon JAXPORT until the agreement has been executed by all appropriate parties.

#### **1.25 ARTICLE/SECTION HEADINGS**

Article or Section headings offering herein are inserted for convenience only, or reference only, and will in no way be construed to be interpretation of the text of this RFP.

#### **1.26 ORDER OF PRECEDENCE**

In the event of any conflict between the provisions of the Contract, the provisions of JAXPORT’S Request for Proposal, referred and incorporated in the Contract, said provisions will be given preference in the following order: 1) Amendments to Contract 2) Contract **20-03** 3) Addenda to Proposal 4) JAXPORT’S Request for Proposal **20-03**, and 5) Proposer’s Proposal.

#### **1.27 VENUE**

The venue of any legal action brought by or filed against JAXPORT relating to any matter arising under this RFP will be exclusively in the appropriate court, sitting in Duval County, Florida that has jurisdiction over such legal action. This RFP will be governed by and interpreted under the laws of the State of Florida.

#### **1.28 ENTIRE AGREEMENT**

This RFP is the entire agreement of the Parties and the Parties are not bound by any stipulations, representations, agreements, or promises, oral or otherwise, not printed or inserted in this RFP. Proposer agrees that no representations have been made by JAXPORT to induce the Proposer to enter into this RFP other than as expressly stated in this RFP. This RFP can neither be changed orally, nor by any means other than by written amendments expressly referencing this RFP and signed by all Parties hereto.

#### **1.29 TAX EXEMPT**

JAXPORT is exempt from State of Florida sales tax. The tax-exempt number is 85-8012544323C-8.

## ARTICLE II GENERAL CONDITIONS

### 2.01 DEFINITIONS

**JAXPORT** - The Jacksonville Port Authority.

**PROPOSAL** - The approved forms on which the Proposer is to submit, or has submitted, its charges for the work contemplated.

**CONTRACT** - The Contract consists of the document labeled “Specifications for **LOGISTICS AND INTERMODAL CONFERENCE PLANNER** for the Jacksonville Port Authority”, **RFP 20-03** and any Addendum issued before the execution of the Contract; Proposer’s Proposal; and any Modification issued after execution of the Contract. A Modification is a written amendment to the Contract signed by both Parties. The order of precedence of contract documents will be as specified in Article 1.26.

**CONTRACTING OFFICER** - Designated JAXPORT individual who provides JAXPORT Inspector(s) with Contract information and monitors the administration of the Contract to ensure compliance with terms by both JAXPORT and the Proposer. The Contracting Officer is the only individual authorized to make Contract modifications. The Contracting Officer will be the Director of Procurement Services.

**PROPOSER** - Any individual, firm or corporation entering into a Contract to perform the Scope of Services for JAXPORT.

**PROPOSER'S REPRESENTATIVE(S)** - Individual(s) designated in writing by the Proposer at the time of contract award as the only individual(s) authorized to act for the Proposer in all matters, including change orders, modifications to contract terms, quoting of services and provision of estimates for additional services not stated in the scope of services.

### 2.02 SCOPE OF SERVICES

The work to be performed under this Contract is specified in Article IV, Scope of Services, with work to be performed as specified. JAXPORT, without invalidating the Contract, may order extra work or make changes by altering, adding to, or deducting from the work, and the Contract will be adjusted accordingly, based on a mutually agreed upon negotiated fee. Changes in the work and the contract fees may only be changed by prior written agreement executed by the parties with proper authorization to do so.

### 2.03 TERM OF CONTRACT

The term of the agreement for these services is intended to be for the **2021 conference year** and at the sole discretion of JAXPORT, this agreement may be extended for up to two (2) additional two (2) year periods, based on vendor performance and adherence to prices, terms and conditions. JAXPORT will award this contract to one Proposer who will act as the Prime Consultant(s) and who will serve as the single point of contact, fully responsible for providing **LOGISTICS AND INTERMODAL CONFERENCE PLANNER** services to JAXPORT.

### 2.04 AWARD OF CONTRACT

JAXPORT intends to award a Contract to the Proposer(s) submitting the most responsive and responsible proposal that, when evaluated, is deemed to be in the best interest of both entities. JAXPORT will be the sole judge of which proposal is ultimately determined to be in their best interest and its decision will be final. Only those proposals received in a timely manner from Proposers who can provide evidence that they are fully competent, have the requisite experience, organizational and financial capabilities will be considered. JAXPORT reserves the right to accept or reject any or all proposals. JAXPORT assumes no obligation or commitment to make an award to any person or firm submitting a proposal.

At the discretion of JAXPORT's Evaluation Committee, selected Proposers that are determined to be best qualified based upon the evaluation of written responses, may be invited to make presentations of their experience and approach prior to final selection. Such interviews or presentations will be scheduled at JAXPORT's convenience. JAXPORT will not be liable for any costs incurred in connection with such interviews and/or presentations. JAXPORT is not required to contact a Proposer to obtain additional information to evaluate the Proposal.

JAXPORT will make an award based on a Proposer's ability to meet both entities needs and requirements, based on the **EVALUATION CRITERIA** as shown in **Article 4.05**. Factors used to evaluate each Proposer's response, as well as the weight attributed to each of the factors will vary for each category and are listed in the **Evaluation Matrix - "Attachment No. 1"**.

## **2.05 ESCALATION / DE-ESCALATION**

All pricing submitted shall remain firm for the initial term period. Upon renewal (if applicable), a supplier may submit in writing a request for price escalation/de-escalation based on the average of the previous 12 months percentage of change as listed in the Purchase Price Index related to the industry represented or Consumer Price Index (whichever is appropriate as determine by JAXPORT). JAXPORT reserves the right to decline any price increase request or limit the percentage rate.

## **2.06 CERTIFICATION/PROPOSER QUALIFICATIONS**

Proposer must be a qualified and licensed Firm and have current experience in providing the types of professional services required under this Request for Proposal (RFP). The Proposer must become fully aware of the technical specifications, failure to do so will not relieve a successful proposer of its obligation to provide JAXPORT's requirements for the contract at the price submitted and in accordance with all specifications, terms, conditions and the delivery stated on this RFP.

## **2.07 PAYMENT**

A. All invoices will reference the Contract No. **20-03**. An original and one copy will be emailed to:

[Accounts.payable@jaxport.com](mailto:Accounts.payable@jaxport.com)

*or mailed to:*

Jacksonville Port Authority  
Attn: Accounts Payable  
P.O. Box 3005  
Jacksonville, FL 32206-3496

B. Invoices will be processed following normal JAXPORT payment procedures, which are **thirty (30) days net after receipt of an approved invoice**. Special or early payments will not be authorized.

C. **No payments will be made for per diem charges or travel expenses without prior approval of JAXPORT and in accordance with JAXPORT's Travel Procedures and Guidelines as per attached EXHIBIT D.** The Prime Proposer and any subcontractor must secure written approval from JAXPORT prior to any travel, if the Proposer intends to bill JAXPORT for these expenses.

## **2.08 RESPONSIBILITIES OF THE PROPOSER**

A. A post award conference will be scheduled after the Contract is awarded when the Proposer will furnish the certificates of insurance, copies of licenses and other items required by JAXPORT.

B. The Proposer will provide services as described in the Contract upon receipt of Notification of Award issued by JAXPORT.

- C. The Proposer is responsible for product quality, timely delivery and responsiveness as listed in Article IV – Scope of Services.
- D. The Proposer will remain liable for all damages to, or incurred by, JAXPORT caused by the Proposer's negligent performance of any of the services furnished under this Contract.
- E. The Proposer represents that it is an independent Proposer and not an employee of JAXPORT, nor are any of Proposer's employees performing services in furtherance of this Contract to be considered employees of JAXPORT. The Proposer is responsible for any federal or state taxes applicable to this Contract and for complying with the requirements of all federal and state laws about income tax withholding, unemployment insurance and other insurance applicable and necessary for its employees. Employees of the Proposer will not be eligible for any Federal Social Security, State Worker's Compensation or unemployment insurance under this Contract except as employees of the Proposer.
- F. The Proposer will designate in writing a qualified person(s) to act as its designated representative. The Proposer's Representatives(s) will have authority to act for the Proposer in all matters covered by this Contract.
- G. The Proposer will notify JAXPORT Contact in writing, prior to affecting a personnel change concerning the professional personnel assigned to the Contract. JAXPORT will have the right to reject any personnel assigned to perform work under this Contract.
- H. All personnel employed by the Proposer will be competent, trustworthy and properly trained. The Proposer and its employees will be required to comply with all the applicable regulations of JAXPORT.

#### **2.09 RESPONSIBILITIES OF JAXPORT**

- A. At the post award conference, JAXPORT will provide a list of personnel, with phone numbers, who are designated as JAXPORT representatives.
- B. JAXPORT will promptly notify the Proposer, or its designated representative(s), of any problem encountered during the Contract term and will arrange for a meeting to resolve issues.
- C. JAXPORT will provide timely processing of Proposer's invoices, if all the terms of the Contract have been met. In cases where Contract procedures were not followed, every attempt will be made to reach an agreement acceptable to both parties, but JAXPORT will not be liable for costs billed by the Proposer in violation of Contract terms.

#### **2.10 INDEMNIFICATION**

Any Contract resulting from this Request for Proposal will include the following provisions:

To the fullest extent permitted by law, the Proposer agrees to indemnify, defend and hold harmless JAXPORT, its officers, agents, volunteers, and employees from and against all claims, damages, losses, and expenses, including but not limited to all fees and charges of engineer(s), architect(s), attorney(s) and other professional(s), court costs, or other alternative dispute resolution costs arising out of, resulting from, or otherwise but for the performance or furnishing of Proposer's work or services under this Request for Proposal; provided that any such claim, damage, loss or expense is attributable to bodily injury, sickness, disease, death or personal injury, or property damage, including the loss of use or diminution in value resulting there from; but only to the extent caused in whole or in part by the actual or alleged negligent acts, errors, or omissions of Proposer, Proposer's Subcontractor(s) or anyone directly or indirectly employed or hired by Proposer, or anyone for whose acts Proposer may be liable. JAXPORT reserves the right, but not the obligation, to participate in defense without relieving Proposer of any obligation hereunder.

#### **2.11 INSURANCE**

Before starting and until acceptance of the work by JAXPORT, any contract resulting from this Request for Proposal will include the following provisions:

- A. Without limiting its liability under the contract, the Proposer will obtain and maintain at its sole expense during the life of the contract, insurance of the types and in the minimum amount stated below:
- (1) Comprehensive General Liability - Premises-Operations, Products-Completed Operations, Contractual Liability, Independent Proposers, Insurance Limits: \$1,000,000 each occurrence, \$2,000,000 annual aggregate for bodily injury and property damage, combined single limit.
  - (2) All autos-owned, hired, or non-owned; Insurance Limits: \$300,000 each occurrence, combined single limit.
  - (3) Workers Compensation/Employers Liability at the minimum of the Florida Statutory coverage and Employer's Liability (including appropriate Federal Acts); Insurance Limits: Statutory Limits (Workers' Compensation) \$500,000 each accident (Employer's Liability).
  - (4) PROFESSIONAL LIABILITY - \$1,000,000 per Occurrence
  - (5) Umbrella - **(This is additional coverage and limits with the following "form coverage" for the following primary insurance: Employer's Liability, Commercial General Liability, and Automobile Liability)**; Insurance Limits: \$1,000,000 each occurrence and annual aggregate.
  - (6) DEDUCTIBLES AND SELF-INSURED RETENTIONS: Any deductibles or self-insured retentions must be declared to and approved by JAXPORT.
  - (7) ACCEPTABILITY OF INSURERS: Insurance is to be placed with insurers with a Best's rating of no less than A: VI, and approved to do business in the State of Florida.
- B. The insurance specified above will, either by separate policy, provisions in the policies or by special endorsements attached thereto, insure JAXPORT against the risks to which it is exposed as the owner of the premises. The inclusion of JAXPORT as an additional insured is not intended to, and will not make JAXPORT a partner or joint venture with Proposer in Proposer's services at JAXPORT. Such policies will also insure Proposer against the risks to which it is exposed as the Proposer authorized under this RFP and will be for full coverage without any deductibles and/or retentions subject to approval by JAXPORT and will contain provisions by the respective insurers waiving the right of such insurers to subrogation.
- C. The proof of insurance supplied before execution of this contract will have the words "endeavor to" stricken.
- D. All insurance will be maintained in force until completion of the work, and will include an endorsement requiring thirty (30) days prior written notice to JAXPORT's Risk Manager before any change or cancellation is made effective.
- E. Such insurance will be written by a company or companies licensed to do business in the State of Florida and satisfactory to JAXPORT. Before commencing any work under this contract, certificates evidencing the maintenance of said insurance will be furnished to JAXPORT and will be subject to the approval of JAXPORT's Risk Manager, P.O. Box 3005, Jacksonville, FL 32206.
- F. Any sub Proposers of Company shall procure and maintain the insurance required of Company hereunder during the life of the subcontracts. Sub Proposers' insurance may be either by separate coverage or by endorsement under insurance provided by Company. Company shall submit sub Proposers' Certificates of Insurance to JAXPORT prior to allowing sub Proposers to perform Work on JAXPORT's job sites.

## **2.12 PERMITS AND LICENSES**

All licenses necessary to carry out the delivery will be secured and paid for by the Proposer and remain in effect throughout the duration of the Contract. If the Proposer allows unlicensed personnel to perform work on JAXPORT facilities, the Contract will be terminated immediately.

## **2.13 PERFORMANCE BOND REQUIREMENT** – *Not Required*



## **2.14 TERMINATION FOR DEFAULT**

If through any cause within the reasonable control of the successful Proposer/Firm, it shall fail to fulfill in a timely manner, or otherwise violate any of the covenants, agreements, or stipulations material to the Agreement, JAXPORT shall thereupon have the right to terminate the services then remaining to be performed by giving written notice to the successful Proposer of such termination which shall become effective upon receipt by the successful Proposer of the written termination notice.

In that event, JAXPORT shall compensate the successful Proposer in accordance with the Agreement for all services performed by the Proposer prior to termination, net of any costs incurred by JAXPORT as a consequence of the default.

Notwithstanding the above, the successful Proposer shall not be relieved of liability to JAXPORT for damages sustained by JAXPORT by virtue of any breach of the Agreement by the Proposer, and JAXPORT may reasonably withhold payments to the successful Proposer for the purposes of set off until such time as the exact amount of damages due to JAXPORT from the successful Proposer is determined.

## **2.15 TERMINATION FOR CONVENIENCE**

JAXPORT may, for its convenience, terminate the services then remaining to be performed at any time without cause by giving written notice to successful Proposer of such termination, which shall become effective one hundred twenty (120) days following receipt by Proposer of such notice. In that event, all finished or unfinished documents and other materials shall be properly delivered to JAXPORT. If the Agreement is terminated by JAXPORT as provided in this section, JAXPORT shall compensate the successful Proposer in accordance with the Agreement for all services actually performed by the successful Proposer and reasonable direct costs of successful Proposer for assembling and delivering to JAXPORT all documents. No compensation shall be due to the successful Proposer for any profits that the successful Proposer expected to earn on the balance of the Agreement. Such payments shall be the total extent of JAXPORT's liability to the successful Proposer upon a termination as provided for in this section.

## **2.16 ASSIGNMENT**

Due to the additional administrative burden placed on JAXPORT, the Proposer will not assign or otherwise transfer its rights under the Contract, without the express written consent of JAXPORT.

## **2.17 FORCE MAJEURE**

- A. Performance of this RFP by both JAXPORT and the Proposer will be pursued with due diligence in all requirements hereof; however, neither JAXPORT nor the Proposer will be considered in default in the performance of its obligations under this RFP to the extent that such performance is prevented or delayed by causes not within the control of either Party and not foreseeable or, if foreseeable cannot be avoided by the exercise of reasonable care, including, but not limited to, acts of civil or military authority (including but not limited to courts or administrative agencies); acts of God; war; riot; insurrection; inability to secure approval, validation or sale of bonds; inability to obtain any required permits, licenses or zoning; blockades; embargoes; sabotage; epidemics; fires; floods; strikes; lockouts; or collective bargaining. Upon any delay resulting from such cause the time for performance of each Party hereunder (including the payment of monies if such event prevents payment) will be extended for a period necessary to overcome the effect of such delays.
- B. In case of any delay or nonperformance caused by the above causes, the Party effected will promptly notify the other in writing of the nature, cause, date of commencement and the anticipated extent of such delay, and will indicate the extent, if any, to which it is anticipated that any delivery or completion dates will be affected by that.

## **2.18 NON-WAIVER**

Failure by either Party to insist upon strict performance of any of the provisions of this RFP will not release either Party of any of its obligations under the RFP.

**ARTICLE III  
PROPOSAL FORM**

**PROPOSER'S NAME:** \_\_\_\_\_

The following checklist is provided for convenience. The Proposer should carefully review the submittal requirements in the RFP and submit all information requested.

1. Proposed Rate/Fee and Proposer's Certification (Proposal Form – Article III)
2. Proposer's Maritime or Logistic Event Planning Experience to include references from three (3) public entity customers with similar services, including contact names, email address and phone number.
3. Proposer's General Conference Planning Experience
4. Qualifications and Experience of Account Lead assigned to JAXPORT
5. Evidence that the Firm is licensed to do Business in the State of Florida.
7. Acknowledgement of Addendums (*if any*)
8. Conflict of Interest Certificate (Exhibit "A")
9. Sworn Statement of Public Entity Crimes (Exhibit "B")
10. E-Verify Compliance Form (Exhibit "C")

**PROPOSED FEE**

JAXPORT is requesting a lump sum price to provide conference planning services as outlined in this RFP. Please note the following regarding Consultant fees:

- a. JAXPORT will pay the Consultant in four (4) installments between execution of the contract and conclusion of the conference in April 2021, based on performance milestones outlined below.
- b. If at least 275 non-sponsor participants register for the 2021 conference, then in addition to this lump sum, JAXPORT will pay Consultant a total of five (5%) percent bonus for all sponsorship sales above \$150,000 (*i.e sponsorship sales of \$150,001 would result in a bonus of \$7,500.05*). This sponsor percentage will be paid to the Consultant at the conclusion of the conference in April 2021.

**PROPOSED TOTAL FEE:** \$ \_\_\_\_\_

**Schedule of Payments:**

***Installment #1 - 25% of lump sum paid***

*(Conference website completed and online registration is fully functional; sponsor solicitation package completed and initial sponsor solicitation letters sent to all potential sponsors; initial Speaker Selection Committee has been held; initial topic and speaker list generated)*

***Installment #2 - 25% of lump sum paid***

*(125 delegates registered for conference; 50% of \$150,000 targeted sponsorship funds raised; website up to date; initial invitations sent to all speakers/moderators; full registration and sponsor report provided)*

***Installment #3 - 25% of lump sum paid***

*(200 delegates registered for conference; 80% of \$150,000 sponsorship funds raised; website up to date; all speakers invited; full registration and sponsor report provided)*

***Installment #4 - 25% of lump sum + due percentage of sponsor sales***

*(Conference completed with Consultant completing all responsibilities outlined in this RFP Scope of Services; reconciliation of all event revenue/expenses; final reports issued to JAXPORT.)*

The proposal must be signed by an officer of the firm and JAXPORT may rely on all representations contained therein for 90-days from the date established for receipt of proposals. The proposals will be reviewed by an Evaluation Committee (“Committee”) made of JAXPORT staff members and any other individuals JAXPORT considers necessary in order to determine qualifications, interest and availability by reviewing all written responses received that express an interest in performing the services. At its sole option, JAXPORT may conduct formal interviews of selected respondents that are determined to be the best qualified base upon evaluation of written responses. JAXPORT will not reimburse Proposer for any costs incurred if presentations are required.

**PROPOSER’S CERTIFICATION**

**1) Certification and Representations of the Proposer**

By signing and submitting a proposal, the Proposer certifies and represents as follows:

- A. That it has carefully examined all available records and conditions, including sites if applicable, and the requirements and specifications of these Contract Documents prior to submitting its Proposal. Where the Proposer visits sites, no work or other disturbance is to be performed while at the site without written permission by JAXPORT in advance of the site visit.
- B. That every aspect of its submitted Proposal, including the Contract Price, are based on its own knowledge and judgment of the conditions and hazards involved, and not upon any representation of JAXPORT. JAXPORT assumes no responsibility for any understanding or representation made by any of its representatives during or prior to execution of the Contract unless such understandings or representations are expressly stated in the Contract and the Contract expressly provides that JAXPORT assumes the responsibility.
- C. That the individual signing the proposal is a duly authorized agent or officer of the firm. Proposals submitted by a corporation must be executed in the corporate name by the President or Vice President. If an individual other than the President or Vice President signs the proposal, satisfactory evidence of authority to sign must be submitted with the proposal. If the proposal is submitted by a partnership, the proposal must be signed by a partner whose title must appear under the signature. If an individual other than a partner signs the proposal, satisfactory evidence of authority to sign must be submitted with the proposal. The corporation or partnership must be in active status at the Florida Division of Corporations at the time of submission of the proposal.
- D. That the firm maintains in active status any and all licenses, permits, certifications, insurance, bonds and other credentials including not limited to Contractor’s license and occupational licenses necessary to perform the services. The Proposer also certifies that, upon the prospect of any change in the status of applicable licenses, permits, certifications, insurances, bonds or other credentials, the Proposer shall immediately notify JAXPORT of status change.
- E. That it read understands and will comply with Article 1.15, Public Entity Crime “Exhibit B” and Conflict of Interest Certificate “Exhibit A” of these instructions to Proposers.

**REQUEST FOR PROPOSAL 20-03  
LOGISTICS AND INTERMODAL CONFERENCE PLANNER**

**PROPOSER'S CERTIFICATION ACKNOWLEDGEMENT**

I hereby acknowledge, as Proposer's authorized agent, that I have fully read and understand all terms and conditions as set forth in this Proposal, I have met the minimum requirements (See **Article IV, Paragraph 4.02**), and will fully comply with such terms and conditions.

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

Company Name: \_\_\_\_\_

Proposer is a (*check one*):     Corporation     Partnership     Individual

Authorized Agent's Name: \_\_\_\_\_

Authorized Agent's Title: \_\_\_\_\_

Authorized Agent's Email Address: \_\_\_\_\_

Telephone Number: \_\_\_\_\_ Fax Number: \_\_\_\_\_

Federal Identification Number : \_\_\_\_\_

Remittance Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

***Failure to provide above information in stated format may be grounds for rejection of Proposal.***

**REQUEST FOR PROPOSAL 20-03  
LOGISTICS AND INTERMODAL CONFERENCE PLANNER**

**NO PROPOSAL FORM**

If your firm cannot submit a proposal at this time, please provide the information requested in the space provided below and return it to:

**Jacksonville Port Authority  
Attn: Procurement Services  
2831 Talleyrand Avenue  
Jacksonville, FL 32206**

We are unable to submit a proposal at this time due to the following reasons:

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Name of Firm: \_\_\_\_\_

Signature: \_\_\_\_\_

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

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

Telephone Number: \_\_\_\_\_ Email: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

## **ARTICLE IV SCOPE OF SERVICES**

### **4.01 JAXPORT OVERVIEW**

The Jacksonville Port Authority (JAXPORT) is a full-service international trade seaport in the Southeastern United States. JAXPORT owns, maintains and markets three cargo terminals, two intermodal rail terminals and one passenger cruise terminal along the St. Johns River.

JAXPORT and its maritime partners handle containerized cargo, automobiles (RoRo), dry and liquid bulks, breakbulk commodities, and over-sized and specialty cargoes. JAXPORT's three marine terminals handled a total of 10.9 million tons of cargo in FY19, including more than 1.3 million TEUs (containers) – making Jacksonville the largest container handling port in Florida – and nearly 696,500 vehicles, making JAXPORT one of the nation's busiest vehicle handling ports.

Dozens of ocean carriers call JAXPORT, offering shippers competitive transit times to/from 140 ports in more than 70 countries. Port terminals are located within minutes of three major interstates: I-10, I-75 and I-95 – providing access to more than 70 million U.S. consumers within a day's drive.

JAXPORT is served by 100 trucking firms and 40 daily trains via Class I railroads CSX and Norfolk Southern, regional rail line Florida East Coast Railway, and on-dock rail providers. JAXPORT's intermodal connections offer seamless access to markets throughout the Southeastern U.S., Mississippi and Ohio River valleys, and Midwest.

JAXPORT is Northeast Florida's economic engine — cargo activity through Jacksonville's seaport positively impacts more than 26,000 jobs in Northeast Florida and supports nearly \$31.1 billion in annual economic output for the region and state. This impact is expected to continue to grow as JAXPORT and its partners continue to invest in building the port of the future.

### **4.02 MINIMUM QUALIFICATIONS**

- Proposers must demonstrate they possess the experience and resources necessary to plan and coordinate all facets of this event as outlined in 4.03 Scope of Services.
- Proposals must contain a biography of the Consultant, its staff and capabilities in sufficient detail to allow a reasonable evaluation of the relative capability of respondents to serve the particular needs of JAXPORT and each of the target areas stated in 4.03 Scope of Services.
- Proposer must identify one individual designated as the "Account Lead" who will be heavily involved in planning JAXPORT's event and will be JAXPORT's primary contact throughout the entire process.
- Proposer must provide a disclosure of any other major events or conferences your company is planning in January through May 2021 which might conflict with your ability to fully deliver on this proposal.
- Proposer must provide three (3) client references, including contact person name, email address and telephone numbers for each.

### **4.03 SCOPE OF SERVICES**

JAXPORT desires to hold a "Logistics and Intermodal Conference" in April/May 2021 at a Jacksonville-area hotel to be selected by Consultant in partnership with the port liaison. JAXPORT expects to register at least 350 conference participants, of which approximately one quarter to one half will come from out of town.

This event includes an evening cocktail reception, a full conference and dinner, and a golf tournament. The conference portion will feature approximately 30 speakers from around the United States presenting information in keynote presentations and panel discussions. The golf tournament is intended to draw between 120-144 golfers, mostly (but not exclusively) conference registrants. A port tour and possible spouse excursion will also be offered.

The Consultant will work closely with JAXPORT’s Senior Coordinator, Marketing to plan all facets this conference, based on the following delineation of responsibilities:

ITEM	CONSULTANT RESPONSIBILITY	JAXPORT RESPONSIBILITY
<p><b>Pre-registration and Registration</b></p>	<ul style="list-style-type: none"> <li>• Mail initial “Save the Date” mailers</li> <li>• Build conference website with integrated online registration/payment function (e.g. CVENT or similar)</li> <li>• Maintain and update entire conference website with current content throughout entire event planning process, to include, at a minimum, the following information updated daily as needed: <ul style="list-style-type: none"> <li>- Conference overview</li> <li>- Registration information (e.g. dates, location, pricing, etc.), with online “cafeteria style” registration available no later than <b>August 2020</b></li> <li>- Conference agenda</li> <li>- Hotel and ground transportation information</li> <li>- Golf tournament information</li> <li>- Spouse excursion information (if necessary)</li> <li>- Sponsorship opportunities; sponsor recognition</li> <li>- Other information relevant to the conference</li> </ul> </li> <li>• Serve as main point of contact for all registration inquiries and questions. Identify a phone number staffed during regular business hours to handle such inquires. Establish a dedicated email address for registrant inquiries. Respond by email or phone to address all questions/concerns within one business day.</li> <li>• Coordinate and track all registrations, update registrations as needed: coordinate online payments, refunds, name substitutions, etc.</li> <li>• Run reports as needed to determine registrants; payments; etc.</li> <li>• Order all promotional materials needed for the event. (lanyards, name badges, conference bag, etc.)</li> <li>• Directly contract with service providers for support services needed to execute this conference (e.g. Audio Visual; entertainment; plants; promotional items; etc.)</li> </ul>	<ul style="list-style-type: none"> <li>• JAXPORT’s Graphic Designer will create the ‘Save the Date’ mailer.</li> <li>• Assist Consultant in setting up JAXPORT merchant account for website if needed.</li> <li>• Provide necessary event information and content for website as needed throughout the planning process.</li> </ul>
<p><b>Reports</b></p>	<ul style="list-style-type: none"> <li>• If CVENT or similar online reporting system is not used and available to JAXPORT, run the following reports by the 1<sup>st</sup> and 15<sup>th</sup> of each month (or as needed) and place online via GoogleDrive, DropBox or similar: registrants by registrant type, to include registrant name, company name; golfers; dinner tickets; total amount due per person; total paid; etc.)</li> <li>• Run a comprehensive report at the conclusion of the event delineating who registered (by first name, last name, company name, address, email and phone); events registered to attend; amount paid; and any other relevant information.</li> </ul>	<ul style="list-style-type: none"> <li>• None.</li> </ul>

ITEM	CONSULTANT RESPONSIBILITY – <i>(continued)</i>	JAXPORT RESPONSIBILITY
<b>Hotel</b>	<ul style="list-style-type: none"> <li>• Selection of conference hotel</li> <li>• Serve as main liaison and point of contact for the conference hotel leading up to and during the event.</li> <li>• Negotiate guest room rates</li> <li>• Reserve block of guest rooms</li> <li>• Negotiate concession rates</li> <li>• Negotiate rates with hotel for food, beverage and related items.</li> <li>• Select room locations for plenary &amp; breakout sessions.</li> <li>• Answer all questions and address all issues raised by the hotel regarding this event.</li> <li>• Compile and coordinate Banquet Event Orders directly with the hotel.</li> <li>• Monitor room block; keep JAXPORT informed of any shortages or overages. <i>(Note that registrants book their own guest rooms directly with conference hotel.)</i></li> <li>• Ensure all meeting and dining space is set up as planned for each function.</li> <li>• Ensure all food and beverage is ready for each function</li> </ul>	<ul style="list-style-type: none"> <li>• Participate in all aspects of the venue selection process.</li> <li>• Approve all negotiations made by Consultant on behalf of JAXPORT.</li> <li>• Direct payment for conference hotel</li> </ul>
<b>Food &amp; Drink</b>	<ul style="list-style-type: none"> <li>• Recommend and coordinates menu directly with hotel based on JAXPORT budget and contract with hotel</li> <li>• Recommend theme and general plans for main conference dinner</li> <li>• Coordinate all details of main conference cocktail reception and conference dinner based on JAXPORT’s event design.</li> <li>• Ensure planned food and drink is in place during all meals and coffee breaks planned for the event.</li> </ul>	<ul style="list-style-type: none"> <li>• Set price range or maximum for each meal/break</li> <li>• Decide food station and bar placements</li> <li>• Approve menu selections</li> </ul>
<b>Exhibitor Area</b>	<ul style="list-style-type: none"> <li>• Solicit exhibitors via sponsorship opportunities.</li> <li>• Coordinate room set up (e.g. tables, chairs etc.) with event hotel.</li> <li>• Coordinate with sponsors/exhibitors on details of their space: e.g. time to set up/take down; power needs; table location; signage.</li> <li>• Coordinate all related facets of this area.</li> </ul>	<ul style="list-style-type: none"> <li>• None.</li> </ul>
<b>Budget</b>	<ul style="list-style-type: none"> <li>• Track all revenue and expenses via a line item budget</li> <li>• Collect invoices, make payments and track pending made for all Vendors.</li> <li>• At conference end, present to JAXPORT a line item revenue-expense report</li> </ul>	<ul style="list-style-type: none"> <li>• Approve all expenditures made by Consultant on behalf of JAXPORT</li> </ul>



ITEM	CONSULTANT RESPONSIBILITY – <i>(continued)</i>	JAXPORT RESPONSIBILITY
<b>On-site Registration</b>	<ul style="list-style-type: none"> <li>• Partner with JAXPORT to lead onsite execution of the event.</li> <li>• Lead onsite registration and registration check in</li> <li>• Print all name badges prior and distribute at event.</li> <li>• Prepare a registration list of attendees made available to every registrant.</li> <li>• Have ability to create new name tags on site during event</li> <li>• Prepare and distribute all agendas, tickets, handouts and related materials at event.</li> </ul>	<ul style="list-style-type: none"> <li>• Partner with Consultant to lead onsite execution of the event.</li> </ul>
<b>Sponsors</b>	<ul style="list-style-type: none"> <li>• Create sponsorship solicitation package</li> <li>• Solicit and sell all sponsorships, with intent to raise at least \$150,000 in sponsor sales. <i>(Note that JAXPORT raised \$153,000 in sponsor sales for this event in 2019.)</i></li> <li>• Track all sponsor commitments and payments</li> <li>• Maintain a matrix, available to JAXPORT, of sponsorship progress, including a list of all sponsor targets; sold sponsorships; dollar commitment; and status of unsold targets.</li> <li>• Invoice all sponsors, and contact sponsors who have not paid until payment is received</li> <li>• Collect all sponsor logos and ensure they are distributed in proper format to correct parties for all uses (e.g. event program; signage; Sponsor PowerPoint; etc.).</li> <li>• Coordinate all benefits with sponsors to ensure sponsors receive all promised items (e.g. signage; display tables; etc.); stay in regular contact with sponsors about their benefits to ensure they are taking advantage of all elements of their package.</li> <li>• Create PowerPoint presentation with all sponsor logos to be shown at the event.</li> <li>• Notify and remind sponsors as needed of ability to place items in registration bags, and deadline for JAXPORT to receive items.</li> <li>• Order registration “SWAG” bags for sponsor items to be inserted</li> <li>• Stuff registration bags with sponsor items</li> <li>• Order sponsor lanyards.</li> <li>• Send post-event sponsor Thank You letter</li> </ul>	<ul style="list-style-type: none"> <li>• Work with Conference Planner to create sponsorship package.</li> <li>• Give final approval on all conference-related promotional items.</li> <li>• Assist with follow up phone calls to key JAXPORT partners to solicit sponsorships</li> <li>• JAXPORT Graphic Designer to approve all sponsor-related visual elements and assist in the creation as needed.</li> </ul>
<b>Welcome Reception</b>	<ul style="list-style-type: none"> <li>• Recommend and coordinate menu</li> <li>• Track ticket sales via website</li> <li>• Ensure hotel has prepared the space for use</li> <li>• Ensure all sponsor signage/banners are in place</li> <li>• Ensure food and beverage served as planned</li> <li>• Coordinate onsite registration/check in</li> </ul>	<ul style="list-style-type: none"> <li>• Set budget for reception</li> <li>• Approve menu</li> <li>• Identify room location</li> <li>• Provide event design details</li> </ul>

ITEM	CONSULTANT RESPONSIBILITY – <i>(continued)</i>	JAXPORT RESPONSIBILITY
<b>Signage/Banners</b>	<ul style="list-style-type: none"> <li>• Create all banners and sponsor signs under the direction of JAXPORT’s Senior Coordinator, Creative Services to design items and coordinate printing in Jacksonville.</li> <li>• Coordinate placement of all signage at event based on event design plans.</li> <li>• Ensure hotel arranges directional signage as needed</li> <li>• Coordinate with hotel to hang any banners</li> </ul>	<ul style="list-style-type: none"> <li>• JAXPORT’s planner and creative services coordinator will provide a visual plan based on the event design to include details about signage.</li> </ul>
<b>Main Dinner</b>	<ul style="list-style-type: none"> <li>• Coordinate registrations and payments via website</li> <li>• Distribute tickets as part of event registration</li> <li>• Execute JAXPORT’s event design.</li> <li>• Coordinate and oversee set-up of room, décor and all related details</li> <li>• Arrange entertainment in consultation with JAXPORT</li> <li>• Lead coordination with any third party Vendors (e.g. disc jockey; plant rental; etc.)</li> <li>• Arrange food and drinks</li> <li>• Arrange all other details of this function</li> </ul>	<ul style="list-style-type: none"> <li>• Set event design and theme for dinner</li> <li>• Set budget for dinner event</li> <li>• Approve menu</li> <li>• Set room location</li> <li>• Make dinner tickets</li> </ul>
<b>Golf Tournament</b>	<ul style="list-style-type: none"> <li>• Plan all facets of the conference golf tournament, including but not limited to the following: <ul style="list-style-type: none"> <li>- Coordinate registrations and payments/refunds via conference website</li> <li>- Coordinate with golf course to plan all details of the event</li> <li>- Arrange for purchase of golf shirts gift bags, prizes and related items for golfers</li> <li>- Select breakfast and lunch menus for golfers</li> <li>- Work with JAXPORT to finalize foursome pairings of the event</li> <li>- Send email solicitation and reminders/updates via CVENT or similar system to golfers regarding any items for this tournament.</li> <li>- Handle on-site “check in” of golfers and tournament details on day of tournament</li> <li>- Coordinate with golf course to execute post-event luncheon and awards presentation</li> <li>- Arrange all other details needed to execute the golf tournament.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Set overall parameters for the event</li> <li>• Approve all major elements of the event</li> <li>• Approve foursome pairings of event</li> </ul>
<b>Port Tour</b>	<ul style="list-style-type: none"> <li>• Coordinate registrations via website of this free tour, limited to 22 people.</li> </ul>	<ul style="list-style-type: none"> <li>• Arrange bus and tour guides</li> <li>• Provide actual tour</li> </ul>

ITEM	CONSULTANT RESPONSIBILITY – <i>(continued)</i>	JAXPORT RESPONSIBILITY
<b>Publicity and Printing</b>	<ul style="list-style-type: none"> <li>• Send emails as needing advising or reminding conference registrants regarding conference details</li> <li>• Send monthly email communications to potential registrants in months leading up to event; other email communications as necessary as event draws closer.</li> <li>• Under the direction of JAXPORT’s Sr. Coordinator, Creative Services complete production of the conference program, including copywriting, layout/design and printing; soliciting and collecting sponsor logos; speaker bios and photos; and all related copy and images needed to produce, print and distribute this document.</li> <li>• Assist in publicizing the event to attract registrants, exhibitors and sponsors</li> </ul>	<ul style="list-style-type: none"> <li>• Write all event news releases</li> <li>• Plan and coordinate all paid advertising to publicize the event; JAXPORT also will pay for advertisement placement space.</li> <li>• Assist in crafting messaging for all event marketing</li> </ul>
<b>Conference App</b>	<ul style="list-style-type: none"> <li>• Coordinate a platform, such as Crowd Compass, to create a mobile app experience for attendees.</li> </ul>	<ul style="list-style-type: none"> <li>• JAXPORT Marketing team to create all graphics and copy for the mobile app.</li> </ul>
<b>Volunteers</b>		<ul style="list-style-type: none"> <li>• Identify and provide on-site volunteers to assist with “day of” event support</li> </ul>
<b>Spouse Program</b>	<ul style="list-style-type: none"> <li>• If necessary, coordinate registrations and payments via website of this program.</li> </ul>	<ul style="list-style-type: none"> <li>• If necessary, select spouse program agenda and coordinate all other facets</li> </ul>
<b>Speakers</b>	<ul style="list-style-type: none"> <li>• Solicit and coordinate all speaker PowerPoint/AV presentations</li> </ul>	<ul style="list-style-type: none"> <li>• Select room locations for plenary &amp; breakout sessions, and exhibitor area</li> <li>• Decide topics and agenda</li> <li>• Guide speaker content</li> <li>• Issue all speaker invitations and coordinate all follow up communications with all speakers/moderators</li> <li>• Track speaker RSVP/declines</li> <li>• Follow up with speakers/moderators on presentation details, questions, etc.</li> <li>• Send post-event speaker Thank You</li> </ul>

ITEM	CONSULTANT RESPONSIBILITY – (continued)	JAXPORT RESPONSIBILITY
Audio Visual	<ul style="list-style-type: none"> <li>• Coordinate the selection of an Audio Visual vendor to handle all aspects of the event including lighting, microphones, video, etc.</li> <li>• Collect all speaker PowerPoint slides/video and related items, and prepare files for display during the event;</li> <li>• Coordinate all speaker PowerPoint/AV and graphics presentations with AV vendor and JAXPORT;</li> </ul>	<ul style="list-style-type: none"> <li>• Work with AV vendor to achieve goals set out in the event design plan.</li> <li>• Approve all visual presentations prior to event.</li> </ul>

#### **4.03 PROPOSER’S RESPONSIBILITY FOR ADDRESSING EVALUATION CRITERIA**

Proposer should be aware that the proposal will be evaluated in accordance with the criteria prescribed herein and accordingly would be advised to structure their proposal in a manner to properly address each factor of the Evaluation Criteria.

**A. Evaluation Criteria** - The Evaluation Committee shall determine qualifications, interest and availability by reviewing the written responses received, and, when deemed necessary, by conducting formal interviews of selected Proposer(s) that are determined to be best qualified based upon the evaluation of written responses.

*Failure to provide complete and accurate information will result in lower score on evaluation.  
Failure to list amounts of all fees may result in rejection of proposal as non-responsive.*

**B. Cover Letter (1-page ONLY)** - The cover letter must include the following information:

1. Legal name of the Proposer
2. Primary location (Physical business address)
3. Telephone number, Fax number and e-mail address
4. Name of contact person
5. Authorized signature of contact person

#### **4.04 EVALUATION CRITERIA**

**A. Proposed Rate/Fees – (30 Points Maximum Score)**

Must be expressed as a total amount. (In addition to any other fees, note that Consultant will be required to make a minimum of three visits to JAXPORT for an initial Planning Meeting; a Mid-Event Planning/Review; and then attendance to lead the actual event in 2021.

**B. Proposer’s Maritime or Logistics Event Planning Experience – (30 Points Maximum Score)**

Describe proposer’s overall experience and familiarity with the maritime, transportation and/or logistics industries; describe your experience planning events or conferences for one or more of these industries; describe proposer’s ability to solicit sufficient industry speakers, sponsors and registrants to make JAXPORT’s event successful.

**C. Proposer’s General Conference Planning Experience – (20 Points Maximum Score)**

Describe proposer’s experience specifically planning conferences with multiple components – e.g. multiple speakers/panels; breakout sessions; dinners; etc. – with at least 200 registrants; describe your general experience leading and coordinating key elements outlined in 4.03 Scope of Work.

**D. Experience of Account Lead assigned to coordinate JAXPORT’s event – (20 Points Maximum Score)**

1. Please provide the name, address, telephone number, and email of the individual who will be the primary point of contact for JAXPORT’s staff throughout this event. While JAXPORT recognizes that a team of individuals might assist in this event planning, JAXPORT will require one primary point of contact to be identified for this event.
2. Describe this individual’s experience, training, education and/or knowledge of conference event planning, including roles and responsibilities in planning events similar to the one outlined in this proposal.
3. Briefly list and describe the relevant experience of any other team members who will play a central role in planning and executing this event.

Proposals must be organized with a section covering each of the above items and must include all additional information or attachments properly identified as to its relationship to any items. Failure to provide requested information in the order of the items listed below may result in the proposal being deemed non-responsive and eliminated from further consideration.

The proposal must be signed by an officer of the firm and JAXPORT may rely on all representations contained therein for 90 days from the date established for receipt of proposals. The proposals will be reviewed by an Evaluation Committee (“Committee”) made of JAXPORT staff members and any other individuals JAXPORT considers necessary in order to determine qualifications, interest and availability by reviewing all written responses received that express an interest in performing the services. At its sole option, JAXPORT may conduct formal interviews of selected respondents that are determined to be the best qualified based upon the evaluation of written responses. Those Proposers will be notified to arrange for specific times. JAXPORT will not reimburse Proposer for any costs incurred if presentations are required.

**4.06 CHANGES IN SCOPE OF SERVICES**

JAXPORT, without invalidating the Contract, may order extra work or make changes by altering, adding to, or deducting from the work, and the Contract will be adjusted accordingly, based on a mutually agreed upon negotiated price. Changes in the work and the contract sum may only be changed by prior written agreement executed by the parties with proper authorization to do so.

**4.07 CHANGES IN PERSONNEL**

The Firm will notify JAXPORT in writing primarily thirty (30) days prior to affecting a personnel change concerning the Primary Consultant to be assigned to the JAXPORT contract. JAXPORT will have the right to reject any individual assigned to perform work under this contract, or to request the Consultant to change the Primary Consultant to be assigned to JAXPORT contract.

ATTACHMENT NO. 1

**REQUEST FOR PROPOSAL 20-03  
LOGISTICS AND INTERMODAL CONFERENCE PLANNER  
FOR THE JACKSONVILLE PORT AUTHORITY**

**Evaluation Matrix**

JAXPORT will make award based on the Proposer's ability to meet our needs as rated on the evaluation matrix shown below. Factors used to evaluate the Proposer's response, as well as the weighting of the factors, vary for each service and are listed below in descending order of importance.

<b>ABILITY OF PROPOSER</b>		<b>POINT MATRIX</b>
<b>A.</b>	<b>Proposed Rate/Fees</b>	<b>30</b>
<b>B.</b>	<b>Proposer's Maritime or Logistics Event Planning Experience</b>	<b>30</b>
<b>C.</b>	<b>Proposer's General Conference Planning Experience</b>	<b>20</b>
<b>D.</b>	<b>Experience of Account Lead Assigned to Coordinate JAXPORT's Event</b>	<b>20</b>
<b>TOTAL POINTS:</b>		<b>100</b>

**EXHIBIT A**

**CONFLICT OF INTEREST CERTIFICATE**

Bidder must execute either Section I or Section II hereunder relative to Florida Statute 112.313(12). Failure to execute either section may result in rejection of this bid/proposal.

**SECTION I**

I hereby certify that no official or employee of JAXPORT requiring the goods or services described in these specifications has a material financial interest in this company.

_____ Signature	_____ Company Name
_____ Name of Official (type or print)	_____ Business Address
	_____ City, State, Zip Code

**SECTION II**

I hereby certify that the following named JAXPORT official(s) and/or employee(s) having material financial interest(s) (in excess of 5%) in this company have filed Conflict of Interest Statements with the JAXPORT Office of the Executive Director, 2831 Talleyrand Ave., Jacksonville, Florida 32206, prior to the time of bid opening.

Name	Title or Position	Date of Filing
_____	_____	_____

_____ Signature	_____ Company Name
_____ Print Name of Certifying Official	_____ Business Address
	_____ City, State, Zip Code

**PUBLIC OFFICIAL DISCLOSURE**

JAXPORT requires that a public official who has a financial interest in a bid or contract make a disclosure at the time that the bid or contract is submitted or at the time that the public official acquires a financial interest in the bid or contract. Please provide disclosure, if applicable, with bid.

Public Official \_\_\_\_\_

Position Held \_\_\_\_\_

Position/Relationship with Bidder \_\_\_\_\_

**EXHIBIT B**

**SWORN STATEMENT PURSUANT TO SECTION 287.133(3)(A), FLORIDA STATUTES, ON PUBLIC ENTITY CRIMES**

THIS FORM MUST BE SIGNED AND SWORN TO IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICIAL AUTHORIZED TO ADMINISTER OATHS.

1. This sworn statement is submitted to \_\_\_\_\_  
*(print name of the public entity)*

by \_\_\_\_\_  
*(print individual's name and title)*

for \_\_\_\_\_  
*(print name of entity submitting sworn statement)*

whose business address is \_\_\_\_\_  
\_\_\_\_\_

and (if applicable) its Federal Employer Identification Number (FEIN) is \_\_\_\_\_

(If the entity has no FEIN, include the Social Security Number of the individual signing this sworn statement: \_\_\_\_\_.)

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

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

4. I understand that an “affiliate” as defined in Paragraph 287.133(1)(a), **Florida Statutes**, means:

1. A predecessor or successor of a person convicted of a public entity crime; or
2. An entity under the control of any natural person who is active in the management of the entity and who has been convicted of a public entity crime. The term “affiliate” includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in the interest in another person, or a pooling of equipment or income among persons when not for fair market value under an arm’s length agreement, shall be a prima facie case that one person controls another person. A person who knowingly enters into a joint venture with a person who has been convicted of a public entity crime in Florida during the preceding 36 months shall be considered an affiliate.

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



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

\_\_\_\_\_Neither the entity submitting this sworn statement, nor any of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, nor any affiliate of the entity has been charged with and convicted of a public entity crime subsequent of July 1, 1989.

\_\_\_\_\_The entity submitting this sworn statement, or one or more of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989.

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

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

\_\_\_\_\_  
*(signature)*

\_\_\_\_\_  
*(date)*

STATE OF \_\_\_\_\_

COUNTY OF \_\_\_\_\_

PERSONALLY APPEARED BEFORE ME, the undersigned authority,

\_\_\_\_\_ who, after first being sworn by me, affixed  
*(name of individual signing)*

his/her signature in the space provided above on this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_\_.

\_\_\_\_\_  
**NOTARY PUBLIC**

My commission expires:

## **EXHIBIT C**

### **ACKNOWLEDGEMENT AND ACCEPTANCE OF E-VERIFY COMPLIANCE**

#### **E-VERIFY PROGRAM FOR EMPLOYMENT VERIFICATION**

In accordance with the Governor of Florida, Executive Order Number 11-02 (Verification of Employment Status), whereas, Federal law requires employers to employ only individuals eligible to work in the United States; and whereas, the Department of Homeland Security's E-Verify system allows employers to quickly verify in an efficient and cost effective manner;

The Contractor agrees to utilize the U.S. Department of Homeland Security's E-Verify system to verify the employment eligibility of all new employees hired by the Contractor during the term of the contract. Contractors must include in all subcontracts the requirement that all subcontractors performing work or providing goods and services utilize the E-Verify system to verify the employment eligibility of all new employees hired by the subcontractor during the contract term. The Contractor further agrees to maintain records of its participation and compliance and its subcontractor's participation and compliance with the provisions of the E-Verify program, and to make such records available to JAXPORT upon request. Failure to comply with this requirement will be considered a material breach of the contract.

**By signing below, I acknowledge that I have reviewed, accept and will comply with the regulations pertaining to the E-Verify program.**

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Company Name

Name of Official (*Please Print*)

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Signature of Principal

Title

Date

# **EXHIBIT D**

## **JAXPORT'S TRAVEL PROCEDURES AND GUIDELINES**



**PROCEDURES AND GUIDELINES**

**PROCEDURE:** SOP 1236  
**TITLE:** Travel  
**RESPONSIBILITY:** Director, Finance  
**REVISION DATE:** June 4, 2019



**PROCEDURAL CONTENT:**

- 1. Corporate Card
- 2. Request for Travel
- 3. Prepaid Travel Expenses
- 4. Means of Travel
- 5. Lodging
- 6. Reimbursable Expenses
- 7. Travel Expense Report Submittal
- 8. Monies due to Jaxport
- 9. Forms

**PURPOSE:**

It is JAXPORT's objective to establish procedures and guidelines for all persons traveling on behalf of JAXPORT.

**SCOPE:**

These individuals include, but are not limited to employees, contract employees, board members, consultants and contractors. Any individuals traveling on behalf of JAXPORT must comply with the requirements in this procedure unless stipulated otherwise in a separate legal contract. JAXPORT will ensure that all travel is accomplished in compliance with Part 7 of Chapter 106 Ordinance Code of the City of Jacksonville, City Charter: Section 13.11, Statutory Authority: Section 1001.41(2), Florida Statutes, Laws Implemented: Sections 112.061; 1001.39, Florida Statutes.

Please refer to MP42 and MP43 regarding the number of travelers necessary to accomplish the purpose of travel.

**DEFINITIONS:**

- 1. **Travel Advance** – Payment of cash prior to the commence of travel for certain anticipated travel related expenses.
- 2. **Per Diem** – Payments to traveler to compensate for expenses incurred while traveling away from their home base for periods of twenty-four hours or more.



## PROCEDURES AND GUIDELINES

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### PROCEDURES:

#### I. CORPORATE CARD

##### *II. Objectives*

- To allow JAXPORT personnel access to efficient and alternative means of payment for approved expenses primarily related to business travel and expenses.
- To improve managerial reporting related to corporate card purchases.
- To improve efficiency and reduce costs of payables processing.

##### *Policies*

1. JAXPORT corporate cards have been assigned for all employees and the corporate cards are maintained in the Finance Department by the Manager of Treasury & Compensation. A traveler must notify the Manager of Treasury & Compensation prior to booking travel to have the card activated for use. Approximately, 24 to 48 hours prior to travel beginning, the traveler will be required to sign out their corporate card with the Finance Department. This will ensure that they are able to pay for any charges incurred while on travel for the port.
2. Corporate cards will only be used for legitimate business and travel expenses. Personal purchases of any type are *not* allowed.
3. Cash advances on corporate cards are *not* allowed.
4. Cardholders will be required to sign an agreement indicating they accept these terms. Individuals who do not adhere to these policies and procedures risk revocation of their corporate card privileges and/or disciplinary action.
5. Upon termination of employment, all individuals who maintain their corporate cards directly, must cut the corporate card in half and give it to Human Resources who will, in turn, notify the Manager of Treasury & Compensation.
6. Travelers who do not maintain their corporate cards directly, must turn in their corporate credit card to the Manager of Treasury & Compensation directly after travel.

##### *Process*

1. **Receipts:** Detailed receipts must be retained and attached to expense reports. In the case of meals and port promotions, each receipt must include the names of all persons involved in the purchase, and a brief description of the business purpose of the purchase, in accordance with Port Promotion, SOP 1242. In addition, single receipts under \$30.00 or multiple receipts not exceeding \$50.00, where the employee has paid for an out of pocket expense within Duval County, can be reimbursed directly from petty cash in Human Resources with a detailed receipt.
2. **Expense Report:** Expense reports must be promptly completed and submitted via the established process to enable timely payment of amounts due. All expenses charged while on travel will display on the expense tab in Concur for the traveler to import into their expense report. Please note that charges can take anywhere from seven to ten day to display in Concur based on when the charge was processed through the vendor and bank.



## PROCEDURES AND GUIDELINES

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3. **Tax-exempt certificates:** Cardholders should make every effort to ensure purchases made in Florida do not include sales tax. Tax-exempt certificates are available in the online filing cabinet on JAXPORT's intranet. Cardholders should carry a copy of the State Tax Exemption Certificate as proof of the exemption from certain sales and uses taxes. If after the request for tax exemption is made, taxes are still assessed, reimbursement is appropriate.
4. **Disputing a charge:** Disputed billing can result from failure to receive goods or services charged, fraud, incorrect amounts and duplicate charges. The cardholder should contact the merchant first to resolve any outstanding issues. Notify VISA Customer Service at 1-888-934-1087 of the dispute.
5. **Lost/Stolen card:** Immediately notify VISA Customer Service at 1-888-934-1087 and the Manager of Treasury & Compensation if the card is lost or stolen.

### II. REQUEST FOR TRAVEL

All travel approval, prepaid expenses and expense reports will be handled through a web based travel application. Manual forms will not be accepted unless the web-based travel application is unavailable.

Purpose of Travel: The purpose section of the travel form should clearly state the name(s); title and company of the customer the traveler will visit and/or the name of the event or conference the traveler will attend. This section should also include a statement in the comment section of the request to travel indicating the employee's travel has been discussed with and approved by their supervisor. In the case of Chief Travel, the statement should note in the comment section of the request to travel that their travel was discussed with and approved by the Chief Executive Officer, CAO, CFO, or a designee.

Personal Travel Profiles: All travelers expecting to travel at least twice (2) per year should contact their Travel Coordinator to ensure that pertinent details and the traveler's preferences are met during the reservation process. The traveler is responsible for informing the Travel Coordinator of all personal travel information changes. This will include phone number, medical restrictions, special meal requirements and seat preference.

Chief Executive Officer's Travel (domestic/international): Travel request (s) and expense report(s) for the Chief Executive Officer shall be approved by the Chairman of the Board or his designee. The Chief Executive Officer's Senior Executive Assistant will be responsible for preparing, reviewing and booking all travel and expense reports for the Chief Executive Officer through a web based travel application. Additional responsibilities of the Senior Executive Assistant will include reviewing all expense reports for appropriate documentation and receipts prior to submission to Finance for reimbursement. All other procedures and guidelines will be adhered to regarding purpose of travel, travel request, hotel accommodations, flight arrangements, car rentals, expense report and any and all additional requirements.

Chief Travel (domestic/international): Travel request (s) and expense report(s) for a Chief shall be approved by the Chief Executive Officer, CAO, CFO or a designee and should be handled through a web based travel application. The travel subject matter expert (SME) in each Division will be responsible for



## PROCEDURES AND GUIDELINES

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preparing, reviewing and booking all travel and expense reports for the Chief of the Department. The SME will review all expense reports for appropriate documentation and receipts prior to submission to Finance for reimbursement. All procedures and guidelines will be adhered to regarding purpose of travel, travel request, hotel accommodations, flight arrangement, car rentals, expense report and any and all additional requirements.

City Council Members (domestic/international): Travel request(s) and expense report(s) for City Council members shall be approved by the Chairman of the Board or his designee. All other procedures and guidelines will be adhered to regarding the purpose of travel, travel request, hotel accommodations, flight arrangements, car rentals, expense reports and any and all additional requirements.

Board Travel Processing: Travel Request(s) and Expense Report(s) will be handled by the Senior Executive Assistant to the Chief Executive Officer and/or Board Liaison.

- Travel for any member of the Board of Directors (including necessary travel to and from Board meetings for any member who does not reside locally) must be approved by the attending Board Members (a quorum of four members) in the monthly Board Meeting prior to the actual travel.
- If the monthly Board Meeting does not take place prior to the travel, the preceding month's travel approval will take precedence.
- All other procedures and guidelines will be adhered to regarding purpose of travel, travel request, hotel accommodations, flight arrangements, car rentals, expense report and any and all additional requirements.
- **The Chairman of the Board or his designee will render approval of all Board members' expense reports and travel requests.** All expense reports shall be reviewed by the Accountant II, Billing and Travel before being submitted for final payment processing.

Subject Matter Experts: Appointed Travel Experts within each department will be responsible for booking travel for employees, helping with travel procedures, and assisting with expense report submissions. The Accountant II, Billing & Travel, Administrator will continue to provide overall support, monitoring and direction of the travel program.

Personal Leave/Extended Stays: If an employee desires to take leave in conjunction with official travel the following guidelines apply:

- Traveler must clearly indicate time approved leaves begins and ends on the expense report.
- Traveler will be responsible for any additional cost associated with Personal Leave/Extended Stays - airfare, hotel, car rental, meals, mileage, etc.
- Statement releasing JAXPORT of liability during any personal portion of travel that exceeds constructive travel time in conjunction with business travel must be signed by traveler prior to trip (Please see Accountant II, Billing and Travel for the Travel Liability Release Form) and a copy provided to Accountant II, Billing and Travel.
- If the traveler is on personal leave in conjunction with official JAXPORT business and the original intent of the travel gets canceled, the traveler will be responsible for reimbursing JAXPORT for



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any and all unrecoverable cost associated with the trip that otherwise could have been avoidable had it not been for the personal travel.

- The traveler must close out any auto rental agreement for the official JAXPORT business and obtain a separate agreement for personal use. Proof of both transactions must accompany the expense report.
- Reimbursement in the form of a check or money order from the employee for any additional cost associated with Personal Leave/Extended Stay must accompany the expense report.

### **III. PREPAID TRAVEL EXPENSES**

**Travel Advance:** A travel advance will be considered in cases of international travel and should be requested at least 14 days in advance. Advances will not be issued earlier than 10 business days prior to travel. Travel advances are intended for the following costs ONLY:

- 1) Transportation
- 2) Meals, at the per diem rate if travel is expected to last 5 full days or longer
- 3) Failure to provide the traveler with an advance will create a financial hardship for the traveler

No other expenses shall be authorized or included in the advance.

Upon completion of travel, the traveler is required to:

- Reconcile any expenses paid for with the cash advance
- Provide receipts for all cash advance monies used
- Return any unused monies
- Failure to account for the advance within 5 days, results in traveler owing the entire sum to JAXPORT.

### **IV. MEANS OF TRAVEL**

Travel will be deemed to have commenced at the lesser of; the time the traveler actually began travel, or the latest time required to arrive at the destination to accomplish the purpose of the travel. The same constructive travel time will be applied in the return of the traveler. The purpose of applying this constructive travel time regulation is to ensure the traveler spends the least possible time on official travel.

**Airline Common Carrier:** Airline reservations are made by the Traveler by means of the web based travel application, and or travel agencies. Regardless of the method, the traveler is responsible for obtaining the most economical coach fare at the time of booking.

**First Class Travel:** At no time will the Traveler request first class reservations under any circumstance.

**The following combination of officers will strive to adhere to the following guidelines for executive travel:**





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1. The Chief Executive Officer and no more than one (1) Director / Sr. Director on the same aircraft.
2. No more than two (2) Directors / Sr. Directors may fly on the same aircraft.
3. A Director/ Sr. Director and no more than one (1) direct report may fly on the same aircraft.

Note: Deviations from the policy must be authorized in writing by the Chief Executive Officer prior to the commencement of travel.

**Overnight Delays/Stopovers/Forced Layovers:** Should an airline delay necessitate an overnight stay, the traveler must first attempt to secure complimentary lodging from the airline. If unsuccessful, the traveler should contact Travel Incorporated at 855-890-5172, or the appropriate travel agency for assistance.

**Lost or Excess Baggage:** The ultimate responsibility for retrieving and compensating for lost baggage lies with the airlines. JAXPORT will not reimburse travelers for personal items lost while traveling on business.

Measures that can be taken to minimize baggage losses include:

- Always carry valuables (e.g., jewelry, laptop computers, cameras, etc.) on board the aircraft.
- Always carry important and/or confidential documents on board the aircraft.
- Clearly tag luggage with name, address and phone number.
- Retain baggage claim receipts for checked baggage.

**Excess/Overweight baggage charges will be reimbursed only in the following circumstances:**

- When traveling with heavy or bulky materials or equipment necessary for conducting business.
- Excess baggage consists of JAXPORT's records or property.
- When traveling for more than 5 consecutive days.

**Baggage Fees:** The usual and customary baggage fees that are charged by airlines will be reimbursed with appropriate receipts and documentation.

**Non-Refundable Tickets:** Unused tickets credits may be applied towards future flights. These credits must be used within one year of the issue date.

### **Travel via Vehicle:**

**Automobile Rental:** Travelers should rent a car to their destination when driving is more cost-effective than an airline, travel time by car is less than the cost of airfare and taxi to the location or transporting large or bulky material. When driving travel should not exceed 400 miles one-way.

The Traveler/Subject Matter Expert is responsible for booking the most economical and practical size car available.

The traveler should at all times carry a copy of the City and State Tax Exemption Certificate and make a reasonable effort to inform the provider of the City and State exception from such taxes



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when picking up a rental car. If after the request for tax exemption is made, taxes are still assessed, reimbursement to the traveler is appropriate. When traveler is traveling by a rented automobile, he/she will be reimbursed for tolls, parking and gas.

Rental Car Insurance – With In the State of Florida: For vehicles rented within the State of Florida, all forms of optional insurance shall be declined.

Rental Car Insurance – Out of the State of Florida/International: Travelers should accept all insurance coverage when renting cars out of the State of Florida or in a foreign country. Car rental insurance coverage purchased out of the State of Florida or in a foreign country is reimbursable. Please note that when renting with National/Enterprise, per our state contract we do not need to accept additional coverage.

Rental Car Accidents: Should a rental car accident occur, travelers should immediately contact:

- The rental car company;
- JAXPORT's Risk & Asset Manager

**Fleet Vehicle:** Use of a JAXPORT fleet vehicle is a preferred method of travel within our nine county radius. Please reference SOP 1109, Motor Vehicle Program.

**POV (Personally Owned Vehicle):** Use of a personally owned vehicle is allowed if it is the most cost effective means of travel.

## V. LODGING

Lodging shall be authorized and reimbursed at the reasonable, actual and necessary expense thereof, not to exceed the single room rate and associated taxes. Regardless of payment, the actual zero balance receipt must be submitted with the expense report.

High End Hotel Rates: Depending on the location of the business travel, if a daily hotel rate is considered to be on the high end, the Traveler shall select lodging that is the most economical available consistent with the duties being performed.

Lodging In-State: If travel is within the State the traveler should carry a copy of the City and State Tax Exemption Certificate as proof of the exemption from the certain sales and use taxes. The traveler should make a reasonable effort to inform the provider of the City and State exemption from such taxes. If after the request for tax exemption is made, taxes are still assessed, reimbursement to the traveler is appropriate.

Lodging in Foreign Country: Travelers performing foreign/international travel will be reimbursed for the actual cost incurred for lodging.



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If traveling to an event/conference, the traveler is allowed to stay at the hotel where the event/conference is taking place. Booking should take place in advance to take advantage of discounted conference rate.

Hotel Cancellation Procedures: Travelers are responsible for cancellation of hotel room within the allotted cancellation period. Travelers should request and record the cancellation number in case of billing disputes

### VI. REIMBURSABLE EXPENSES

Unless otherwise noted, all travel should originate from Jacksonville, Florida. The time traveled is the shorter of the time the traveler actually began travel or the latest time reasonably possible to arrive at the destination at the time required to accomplish the purpose of the travel. Based on airport requirements, travelers should arrive at the airport two hours prior to the time of departure(s).

For JAXPORT employees that do not reside within Duval County, the same procedures apply when traveling outside their respective county.

Privately Owned Vehicle: Travel will originate at the principal workplace i.e. JAXPORT facility during Monday through Friday or from the traveler's home during weekend or holidays; or at the traveler's home whichever is the lesser actual mileage to the destination. A traveler may elect to drive a Privately Owned Vehicle (POV) in lieu of air travel or the combination of air travel and auto rental or any other conveyance; however, the payment will be made at the lesser of actual expenses.

All mileage shall be computed from the point of origin to the point of destination. Auto mileage must reflect actual mileage traveled on official business. Any other miles traveled must be reported as vicinity miles and JAXPORT will determine if vicinity miles seem reasonable or excessive. Note: The distance between Jacksonville International Airport and return to JAXPORT facility will not exceed (15) miles in each direction.

For all travel made by Privately Owned Vehicle, reimbursement will be made at the current rate per mile prescribed by the Internal Revenue Service.

A cost analysis must be done to determine the most economical means of travel then reimbursement shall be at the lessor of:

- 1) The current IRS rate per mile for the entire distance, including vicinity miles or
- 2) The airline common carrier fare from the city to the airport nearest the point of travel  
Destination for all travelers using their Private Motor Vehicle, plus the IRS rate per mile for mileage equal to the distance from the airport to the point of destination plus any vicinity mileage.



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Mileage Reimbursement within Duval County: This mileage reimbursement guideline pertains to travel performed on official business within Duval County. An employee who uses his/her private vehicle for official JAXPORT business within Duval County is entitled to reimbursement per mile at the current IRS rate and also parking. These reimbursements are paid by completing an expense report through our automated system. Any staff member who receives a car allowance is not allowed to claim personal vehicle mileage within Clay, Duval or St. John’s County. Please reference SOP 1109, Motor Vehicle Program, filed under Human Resources. Below are standard inner city destinations with one way and roundtrip mileage calculations:

From PCOB to Destination’s Below	One Way	Roundtrip
Downtown (City Hall, Chamber, Hyatt)	4.2	8.4
Blount Island Marine Terminal - BIMT	15	30
Dames Point Marine Terminal – DPMT (Cruise Terminal)	12	24
Dames Point – DPMT (MOL/TraPac)	14	28
Jacksonville International Airport - JIA	15	30
Jacksonville Transportation Authority - JTA	5	10
Jacksonville Electric Authority -JEA	4.1	8.2
Duval County School Board – DCSB	7	14
The Jacksonville Landing	4.3	8.6
Jacksonville Zoo	8	16
Prime Osborne Convention Center	5.4	10.8
Times Union Center	4.3	8.6
Veterans Memorial Stadium /Metropolitan Park	3	6
Small Business Office (Gateway Mall)	4	8
University of North Florida - UNF	14.5	29
Florida State College of Jacksonville (North Campus)	10	20
Jacksonville University – JU	6.5	13.0
11 Street – Main Gate / Main Office	1	2

**Meal Per Diem:** While in travel status, meals shall be reimbursed at the following fixed rates only when travel begins before and extends beyond the times specified:

- 1) **Breakfast:** A Per Diem of ten dollars (\$10) is paid, when travel *begins before* 6:00 a.m. and *extends beyond* 8:00 a.m. A double Per Diem of ten (\$20) will be paid for International travel. For air travel ONLY, travel begins two (2) hours prior to the time the traveler’s conveyance actually departs or two (2) hours after the traveler’s flight has actually returned.



## PROCEDURES AND GUIDELINES

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- 2) **Lunch:** A Per Diem of fourteen dollars (\$14) is paid, when travel *begins before* 12:00 noon and *extends beyond* 2:00 p.m. A double Per Diem of fourteen (\$28) will be paid for International travel. For air travel ONLY, travel begins two (2) hours prior to the time the traveler's conveyance actually departs or two (2) hours after the traveler's flight has actually returned.
- 3) **Dinner:** A Per Diem of twenty-six (\$26) is paid, when travel *begins before* 6:00 p.m. and *extends beyond* 8:00 p.m., or when travel occurs during nighttime hours due to special assignments. A double Per Diem of twenty-six (\$52) will be paid for International travel. For air travel ONLY, travel begins two (2) hours prior to the time the traveler's conveyance actually departs or two (2) hours after the traveler's flight has actually returned.
- 4) If attending a conference and the traveler is provided one or more meals without a specific charge, the traveler is not entitled to per diem for which the meal is furnished.

### **Daily Per Diem:**

A daily per diem rate of \$50 domestically or \$100 internationally will be paid for an entire day when travel time for that day begins before 6:00 a.m. and extends beyond 8:00 p.m.

*NOTE: Documentation indicating meal inclusion/exclusion must be submitted with the Travel Expense Reimbursement Form.*

### **PHONE CALLS:**

Business Calls: Any travel related business calls are approved. All business calls must be supported with the **full name, title and company** for reimbursement. Failure to submit this information will forfeit reimbursement.

### Miscellaneous Reimbursable:

- 1) Ferry fares, bridge, road and tunnel tolls;
- 2) Parking fees-long term parking must be used on trips of four (4) or more days;
- 3) Storage fees;
- 4) Laundry cleaning is approved only if travel exceeds five (5) business days;
- 5) Bottled water consumption will be reimbursed at a reasonable level for **International travel only; Mini bar charges for water will not be reimbursed under any circumstance;**
- 6) Mini bar charges of any kind will not be paid by JAXPORT.
- 7) Personal expenses such as movies and non-business telephone calls will not be reimbursed by JAXPORT.



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- 8) Tips: Reimbursement request for tips for taxi, baggage handling and valet parking must be accompanied by a valid receipt or a signed affidavit for reimbursement.
- 1) Taxi fare to include tips (not to exceed 10% of fare – receipt required);
  - 2) Transportation of baggage not exceeding \$1 per bag per transfer, limited to no more than \$2 per transfers;
  - 3) Valet parking tips (not to exceed 10% of fee)
  - 4) Tips for porters, baggage carriers, bellhops, hotel maids, stewards and others may not exceed \$3 per day total
- 9) Miscellaneous fees charged by airlines such as baggage fees, seats upgrades to economy comfort and other similar expenses that are usual and customary will be reimbursed with appropriate receipts and documentation.
- 10) For additional miscellaneous reimbursements not covered directly in this policy, please reference, SOP 1232, SOP 1110 and SOP 1242.

### **VII. TRAVEL EXPENSE REPORT SUBMITTAL**

**Approval:** A Travel Expense Report must be completed online within (5) business days after the completion of domestic or foreign travel or within five (5) business days after the credit card transaction has been received. Late expense reports must be accompanied with an explanation explaining the reason for failure to meet the required deadline in the notes section. Failure to submit the expense report by the deadline (5 business days) will result in the loss of processing time and a delayed payment. Any expense reports submitted with incomplete information or incomplete documentation will be returned to the traveler for revisions and will result in the delay of processing, and/or disciplinary actions.

**Documentation/Receipts:** The traveler must retain the passenger receipt for expense report documentation. Actual receipts, conference materials, port promotions, itineraries, trip reports and other written documentation pertaining to travel must be included in the travel expense report. At all times the required fields located on the travel expense report must be completed (name, employee#, department, accounting code, and destination, departure and return time, purpose). These items must be attached to your expense report via fax or scan options. A signed and notarized affidavit is required when no receipt or no itemized receipt is available.

**Trip Report:** A trip report will be submitted as an attachment in cases where a traveler did not attend a conference, seminar or training. Each individual traveler must submit his or her own trip report detailing the accomplishments during the trip or a conference/seminar agenda.

Listed below are the items that must accompany a Travel Expense Report in order for the expense report to be processed and the traveler to be reimbursed when applicable:

- Approved Advance Request Form
- Notarized Affidavit Form
- Taxi Receipts
- Paid Lodging Bill with a zero
- Boarding Pass/Stubs-when
- Written explanation for not meeting



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balance	available from the carrier *	5 day Travel Expense Report rule
• Foreign Cash Exchange Receipts	• Port Promotions Receipts	• Toll Receipts
• Receipts for foreign taxes	• Rental Car Receipts	•
• Trip Report	• Storage Receipts	•
• Conference Agenda	• Gasoline Receipts	•

\*Due to changes in the airline industry with regard to Boarding Passes and Electronic Ticketing (E-Tickets) the following will apply when E-Tickets are issued. In cases when the carrier does not issue/ return Boarding Passes (i.e. Southwest, Jet Blue, etc.) a receipt from your E-Ticket check-in is required for reimbursement.

Foreign Travel – While traveling in foreign countries, the credit card must be used in all possible cases. Reimbursement for such charges will be made based on the actual credit card transaction which will include the foreign exchange rate and the credit card conversion fee, if applicable.

**VIII. MONIES DUE TO JAXPORT**

For any errors in payment to the traveler, amounts are recovered in the following order:

1. Deducted from any pending travel reimbursements
2. If there are no pending reimbursements, a Personal check payable to JAXPORT
3. In cases of hardship, a deduction from the employee’s payroll check/checks

**FORMS:**           Travel Liability Release Form

**ADDITIONAL SOP REFERENCES: SOP 1109 MOTOR VEHICLE PROGRAM  
SOP 1232 PETTY CASH  
SOP 1242 PORT PROMOTION  
SOP 1110 RECRUITING AND RELOCATION**

**EFFECTIVE DATE:**

ADM103 – 10/1/2006; 12/20/2006; 6/25/2007; 12/3/2007; 10/1/2009; 9/29/2011; 1/31/13; 1/1/2015; 9/28/16;  
7/25/18

