



**Request for Proposals (RFP) for
Name of RFP: Tourism Strategic Plan
RFP # 322000045**

WORK SUMMARY: The Gilbert Office of Economic Development is seeking proposals from destination experts to develop a tourism plan for Gilbert. The tourism plan shall incorporate components of destination development, management, and marketing in coordination with the Town of Gilbert 2020 General Plan, the economic development strategic plan, the Heritage District 2018 Redevelopment Plan, and the What Works Cities initiative. improving operations and efficiencies and ensuring adaptability in an evolving technology environment.

AWARD TERMS	The initial Agreement term will commence upon execution of the Agreement and continue through October 19, 2022. The Agreement may be renewed for up to 2 additional one (1) year terms.
ISSUE DATE	August 17, 2021
DUE DATE	September 10, 2021; 2PM
DEADLINE FOR INQUIRIES	The deadline for inquiries is September 24, 2021 5PM Local Arizona Time. Questions and/or inquiries must be submitted in writing. Questions submitted after this date and time will not receive a response. The Town of Gilbert reserves the right to issue RFP amendments after the question and answer period. It is each Proposer’s responsibility to check the website www.gilbertaz.gov/rfp for addenda to this RFP. This Request for Proposals may only be modified by a written Addendum.
SUBMITTAL PROCESS	Please email your proposal to terry.kelley@gilbertaz.gov on or before 2:00pm (AZ TIME) September 10, 2021. The proposal shall be in pdf format and all required information must be included. Once your proposal is received you will receive email confirmation from Terry Kelley and the “As Read List” will be posted on the Town’s website.
DOCUMENTS AVAILABILITY	The Proposal Documents consist of parts: I. The Opportunity, II. Scope of Work, III. Proposal Content and Submittal, IV. Evaluation and Award and V. Solicitation Terms and Conditions. Documents can be downloaded at http://www.gilbertaz.gov/rfp
CONTACT	Terry Kelley; terry.kelley@gilbertaz.gov ; (480) 503-6951
EQUAL OPPORTUNITY	Gilbert is an equal opportunity employer. Minority and women’s business enterprises are encouraged to submit proposals on this solicitation.

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1. The Opportunity

1.1. Project Summary

The Gilbert Office of Economic Development is seeking proposals from destination experts to develop a tourism plan for Gilbert. The tourism plan shall incorporate components of destination development, management, and marketing in coordination with the Town of Gilbert 2020 General Plan, the economic development strategic plan, the Heritage District 2018 Redevelopment Plan, and the What Works Cities initiative.

1.2. Background

Tourism in Gilbert Arizona has grown significantly over the last five years. In 2016, Gilbert had 554 hotel rooms at five properties, while downtown Gilbert had growing momentum. Annual hotel rooms sold that year were 176,000 with total visitor spending reaching \$210 million. That same year the first tourism strategic plan was completed as a recommendation from a 2014 tourism feasibility study.

Gilbert is now in the fifth year of implementing the Tourism Strategic Plan and the destination looks much different than when the plan was developed. The Heritage District (downtown Gilbert) has been established as an entertainment destination with over 30 restaurants, regular events, community theatre, and the addition of two higher education universities. Youth and amateur sports are on the rise with Cactus Yards, Gilbert's premier sports complex with eight ballfields modeled after major league fields, bringing tournaments into town every weekend. In addition, the Gilbert Regional Park, 272 acres of family fun and entertainment, and Desert Sky Park, master planned for 16 multi-use fields, both opened and are becoming national draws. Gilbert now has 1156 hotel rooms at 11 properties. Annual hotel rooms sold reached 290,000 (a 65 percent increase from 2016). A 2019 visitor study reported that Gilbert hosts nearly 4 million visitors annually and those visitors account for \$362 million in direct spending. Marketing efforts have also seen substantial growth with the establishment of DiscoverGilbert.com and the incorporation of a marketing plan and seasonal campaigns.

1.3. Business Challenge/Problem

The last five years of tourism in Gilbert have been about establishing the destination management organization (DMO), growing awareness of Gilbert as a destination, and building tourism into a municipal line of service. With such significant growth over the last five years, the next tourism plan should assist in redefining the strategies that will support Gilbert's growth as a tourism destination. In addition, the next five years will be about growing the industry, collaborating regionally, and further establishing Gilbert as a destination for sports, business, and families.

1.4.Goals

1. The town of Gilbert views tourism as a means to diversify the local economy in accordance with the vision of residents and businesses.
2. The Tourism Strategic Plan will guide the development of tourism over the next 3-5 years.

1.5. Award Terms

The Town intends to award one (1) contract.

1.6 Scope of Work

Proposals will include the following information and considerations:

1. Information about the organization and team specialties related to the tourism sector and strategic planning
2. Project examples that demonstrate expertise related to destination planning, including work highlighting community, industry and audience engagement, perspectives on destination development, brand management, audience directed destination management, and marketing KPIs.
3. Proposed project scope of work including, and demonstrating the ability to deliver, the following items:
 - a. What is the proposed process for stakeholder engagement and listening (surveys, interviews, meetings)? Consider resident sentiment, business outreach, industry inclusion, and leadership direction. Provide examples, structure, and timeline.
 - b. Provide an outline of the proposed destination assessment and analysis process with relevant examples. How does it incorporate industry best practices? Consider both the community perspective and organization operations.
 - c. The DMO currently operates on limited resources. Use of resources, program of work, and outlining strategies to improve operations will be important components of the plan. Outline the process and show examples of operational improvement.
 - d. How shall competitive advantage be identified and incorporated into the strategies? Provide examples.
 - e. Gilbert key audiences were identified through the 2014 Tourism Feasibility Study. They are visiting friends and family, business travelers, youth and amateur sports, and Arizona event visitors. Demonstrate experience incorporating key

audiences into the planning process through the development of profiles that include demographic information and travel habits.

- f. Outline the process to incorporate destination development strategies (in-part specific to each audience) related to accommodations, attractions, services, transportation, sense of place, and other related infrastructure. Provide examples of experience integrating tourism development strategies.
 - g. Outline the process to incorporate destination management strategies with a focus on community alignment, destination stewardship, regenerative investment, and consistent collaboration. Provide examples of experience integrating destination management strategies.
 - h. Demonstrate experience incorporating brand management strategies.
 - i. Outline the process to incorporate destination marketing strategies (specific to each audience) with a focus on communication and prioritization. Include strategies to engage each audience but not to the level of a marketing plan. Provide examples of experience integrating destination marketing strategies with a focus on key audiences.
 - j. How shall key performance indicators be included throughout the plan and specifically in the evaluation of each strategy? Demonstrate ability through examples.
 - k. Provide examples of work done on annual tactical plans and include the process for the creation of tactics for years one, two, and three. Include plan updates after year one and year two that include tactical plans for years four and five.
 - l. How shall primary and secondary research be collected? Provide examples of process and experience.
 - m. The scope of work shall also include conducting site tours, planning meetings, report writing and design, communications to project team and stakeholders, a “one-page” plan, and final report and presentation.
4. Include planning timeline from vendor selection to report completion and presentation. Vendor selection is estimated to be 9/30/2021, project kick-off on 11/1/2021, and report completion by the end of April 2022.

1.6. Description of Services

Develop a tourism plan for Gilbert. The tourism plan shall incorporate components of destination development, management, and marketing in coordination with the Town of Gilbert 2020 General Plan, the economic development strategic plan, the Heritage District 2018 Redevelopment Plan, and the What Works Cities initiative. Destination strategies shall cover three years with annual updates to the plan after year one and year two. Development strategies should have a 10-year outlook, and the plan implementation shall occur in the fiscal years 2023 – 2027.

1.7. Performance Metrics and Contract Management

Performance Metrics

The successful outcome of this contract will be demonstrated by the following performance metrics:

- The adherence and ability of the vendor to deliver their scope of work as outlined in the proposal.
- Conduct at least one meeting or survey with each of the key stakeholder groups (residents, businesses, local leadership, tourism industry).
- The delivery of strategies for each of the key audiences (visiting friends and family, business travelers, youth and amateur sports, and Arizona event visitors).
- The delivery of a final report and presentation to businesses and leadership by May 1, 2022.
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Communication and Monitoring

Town of Gilbert will correspond regularly (at least weekly) with the vendor and hold monthly planning update meetings in accordance with the timeline outlined by the vendor in their proposal.

2. Proposal Content and Submittal

2.1. Submittal Checklist

As part of the RFP process, all Proposers are to review, complete, and submit the following proposal components and compliance documents **IN ORDER FOR THE PROPOSAL TO BE RESPONSIVE. FAILURE TO DO SO MAY RESULT IN THE PROPOSAL BEING DECLARED NON-RESPONSIVE AND REJECTED.**

Previous compliance document submittals and/or waivers do not apply. New forms must be completed and processed. **Economic Development Department** reserves the right to request additional information and/or clarification regarding submitted compliance documents during the evaluation process. Proposals **MUST** include the following components and compliance documents listed in the checklist.

1. **COVER LETTER** Include a one-page cover letter that contains a general statement of the purpose for submission, and the following detailed company information:
 - a. **BUSINESS ORGANIZATION** State the full name and address of your organization, and if applicable, any branch office or other subordinate element that will perform or assist in performing the work. Indicate whether you operate as an individual, partnership or corporation; if a corporation, indicate the state in which you are incorporated. Include email addresses and phone numbers for all key personnel.
 - b. **AUTHORIZED NEGOTIATIONS** Include the names, email addresses and phone numbers of personnel of your organization authorized to negotiate the proposed contract with the Issuing Office.
2. **PROPOSAL NARRATIVE** Include responses to all questions and components outlined below in a proposal narrative Proposers shall complete the fillable “**RESPONSE WORKBOOK**” attachment and submit as their proposal. The response workbook can be found at www.gilbertaz.gov/rfp.
3. **REQUIRED COMPLIANCE DOCUMENTS:** Complete the required compliance forms and documents listed in the checklist below and found in the fillable “**RESPONSE WORKBOOK.**”

All of the Proposal Documents apply to and become a part of the terms and conditions of the proposal.

PROPOSAL CHECKLIST	
Follow this sequence in presenting a proposal, with the checklist as the Table of Contents. Proposals must be ordered as indicated on this form. All of the Proposal Documents apply to and become a part of the terms and conditions of the proposal.	
Page #	
PROPOSAL SUBMITTAL	
The proposal prices offered have been reviewed.	
Proposal Package/Envelope has been identified with proposal number and title.	
The Agreement Time and/or schedules have been included.	
The proposal is submitted in time to be received and stamped in by a Town of Gilbert Representative no later than specified time on designated date. (Otherwise the proposal cannot be considered.)	
Any addendums have been included/noted in Offer Section.	
PROPOSAL DOCUMENTS	
One-page Cover Letter (on company letterhead)	
Table of Contents/Proposal Checklist	
Proposal Narrative- Organizational Capacity and Experience	Response workbook
Proposal Narrative- Alignment to Scope of Work	Response workbook
Proposal Narrative- Alignment to Planning Timeline	Response workbook
Proposal Narrative- Cost	Response workbook
Additional Information (Optional)	
REQUIRED RFP COMPLIANCE DOCUMENTS	
Addendum Acknowledgement	Response workbook
Authorized Signature Form	Response workbook

2.2.Submittal Instructions

3.2.1 Format.

Proposers shall submit their proposal in word (workbook)/pdf format by email to Terry Kelley at terry.kelley@gilbertaz.gov and shall be submitted either on the forms provided in this Solicitation or their substantial equivalent. Any substitute document must be legible and contain the same information requested on the forms.

3.2.2 No Modifications.

Modifications shall not be permitted after proposals have been opened except as otherwise provided under applicable law.

2.3.Requirements for Proposers

2.3.1. Town's Right to Reject Proposals: The Town of Gilbert reserves the right to reject any and all proposals and to waive technicalities.

2.3.2. Late Proposals: Late submittals and/or unsigned proposals will not be considered under any circumstances. Envelopes containing proposals with insufficient postage will not be

accepted by Gilbert. It is the sole responsibility of the Proposer to see that his/her proposal is delivered and received by the proper time and at the proper place.

- 2.3.3. *Proposal Amendment or Withdrawal:* A proposal may be withdrawn any time before the proposal due date and time. A Proposal may not be amended or withdrawn after the proposal due date and time except as otherwise provided by applicable law.
- 2.3.4. *Public Record:* All proposals submitted in response to this solicitation and all evaluation related records shall become property of Gilbert and shall become a matter of public record for review, subsequent to proposal opening. Request for nondisclosure of data such as trade secrets and other proprietary data, must be made known in writing to Gilbert in proposals submitted, and the information sought to be protected clearly marked as proprietary. Gilbert will not ensure confidentiality of any portion of the proposal that is submitted in the event that a public record request is made. Gilbert will provide 48 hours notice before releasing materials identified by the Proposal as confidential or proprietary in order for the Proposer to apply for a court order blocking the release of the information.
- 2.3.5. *Solicitation Transparency Policy:* Beginning on the date this Solicitation is issued and continuing until either the date a contract is awarded or this Solicitation is withdrawn by Gilbert, all persons or entities who respond or intend to respond to this Solicitation, including without limitation their employees, agents, representatives, partners, subcontractors, consultants, joint venturers, members, lobbyists, or attorneys (collectively, "Proposers"), shall only discuss matters associated with this Solicitation with the Procurement Officer designated in this Solicitation and shall not have any direct or indirect contact about this Solicitation with any other Town staff or Town official, including, without limitation, members of the evaluation panel, the Town Manager, Deputy Town Managers, the Mayor, or any member of the Gilbert Town Council. As long as the subject matter of the Solicitation is not discussed, Proposers may continue to conduct business with Gilbert.
- 2.3.6. *Persons with Disabilities:* Persons with a disability may request a reasonable accommodation, such as a sign language interpreter, by contacting the Town of Gilbert Purchasing Division, Terry Kelley. Requests shall be made as early as possible to allow time to arrange the accommodation.
- 2.3.7. *Proposal Acceptance Period:* All proposals shall remain open for 180 days after the day of the opening of proposals, but Gilbert may, at its sole discretion, release any proposal and return the proposal security (as applicable) prior to that date. No Proposer may withdraw his proposal during this period without written permission from Gilbert. Should any Proposer refuse to enter into an Agreement, under the terms and conditions of the procurement, Gilbert may retain the security (as applicable), not as a penalty, but as liquidated damages.

- 2.3.8. *Clarifications.* Gilbert reserves the right to obtain Proposer clarifications where necessary to arrive at full and complete understanding of Proposer's product, service, and/or solicitation response. Clarification means a communication with a Proposer for the sole purpose of eliminating ambiguities in the proposal and does not give Proposer an opportunity to revise or modify its proposal.
- 2.3.9. *Waiver and Rejection Rights.* The Town of Gilbert reserves the right to reject any or all proposals or to cancel the solicitation altogether, to waive any informality or irregularity in any proposal received, and to be the sole judge of the merits of the respective proposals received.
- 2.3.10. *Solicitation Addendum Acknowledgement.* Each Solicitation Addendum shall be acknowledged in the Proposal Section, which shall be submitted together with the proposal on the proposal due date and time. Failure to note a Solicitation Addendum may result in rejection of the proposal.
- 2.3.11. *Non-Collusion and Non-Discrimination.* By signing and submitting the proposal, the Proposer certifies that: the Proposer did not engage in collusion or other anti-competitive practices in connection with the preparation or submittal of its proposal; and the Proposer certifies that it does not discriminate against any employee or applicant for employment based on race, color, age, sex, religious or political affiliation, sexual orientation, gender identity, family status, marital status, national or ethnic origin, or mental or physical disability, and that it complies with all applicable Federal, state and local laws and executive orders regarding employment.
- 2.3.12. *Inquiries*
- 2.3.12.1. *Duty to Examine.* It is the responsibility of each Proposer to examine the entire Solicitation, seek clarification (inquiries), and examine its proposal for accuracy before submitting the proposal. Lack of care in preparing a proposal shall not be grounds for modifying or withdrawing the proposal after the proposal due date and time, nor shall it give rise to any Contractor claim.
- 2.3.12.2. *No Right to Rely on Verbal Responses.* A proposer shall not rely on verbal responses to inquiries. A verbal reply to an inquiry does not constitute a modification of the Solicitation.

3. Evaluation and Award

3.1. Evaluation Criteria

General Evaluation Standards

Gilbert seeks to obtain the services described in the Scope of Work. Gilbert will evaluate proposals on the selection criteria set forth below. Gilbert will be the sole judge of whether the services offered are acceptable. Proposals from individuals who have provided inadequate services to municipalities in the past, or proposals offering services proven unsatisfactory in Town's sole judgment may be rejected and not considered.

Gilbert reserves the right to reject any or all proposals or any part thereof, or to accept any proposal, or any part thereof, or to withhold the award and to waive or decline to waive irregularities in any proposal when it determines that it is in its best interest to do so.

A Proposer (including each of its principals) who is lawfully prohibited from any public procurement activity may have its proposal rejected.

EXPERIENCE (15%)
A strong proposal will demonstrate that the Proposer’s organization and team has strong experience related to the tourism sector and strategic planning.
PAST WORK (15%)
The proposal demonstrated expertise through past work in destination planning
SCOPE OF WORK ALIGNMENT (50%)
The proposal demonstrated alignment to the strategic planning scope of work and ability to deliver the plan.
TIMELINE ALIGMENT (10%)
Proposal demonstrated an alignment to the planning timeline
COST (10%)
The proposal provided the best cost of delivering the outlined scope of services

3.2.Selection Process, Award and Protest Procedures

3.2.1. Award

Contractor awards shall be made to the offers deemed most advantageous to the Town, based upon the evaluation criteria listed above, and that meets the minimum requirements and criteria set forth in this RFP solicitation.

3.2.2. Evaluation of Competitive Sealed Offers

The Town will use its discretion in applying the following processes to this solicitation. Any ties in scoring will be resolved with a best and final price request and the lowest price will prevail.

Best and Final Offer (BAFO):

A BAFO is an option available for negotiations. Each Proposer in the Competitive Range, which is determined in the Town’s sole discretion, may be afforded the opportunity to amend its Offer and make one BAFO.

If a Proposer’s BAFO modifies its initial Offer, the modifications must be identified in the BAFO. The Town will evaluate BAFOs based on the same requirements and criteria applicable to initial Offers. The Town will adjust appropriately the initial scores for criteria that have been affected by Offer modifications made by a BAFO. Based on the criteria defined in the solicitation as weighted, the Town will then perform final scoring and prepare final rankings.

The Evaluation Panel will recommend the Offer that is the best value and most advantageous to the Town based on the evaluation criteria.

The Town reserves the right to make an award to a Proposer whose Offer is the highest rated, best value, and most advantageous to the Town based on the evaluation criteria, without conducting written or oral discussions with any Proposer, without negotiations, and without soliciting BAFOs.

Detailed Evaluation of offers and determination of competitive range:

During deliberations, the Evaluation Panel will reach a consensus score for each evaluation criterion except price. The Procurement Officer will score the price, which will be added to the overall consensus score. The overall consensus scores will determine the Proposers' rankings and which Offers are within the Competitive Range, when appropriate.

3.2.3. Offers Not Within Competitive Range

The Town may notify Proposers of Offers that the Town determined are not in the Competitive Range.

Discussions with Proposers in the Competitive Range:

1. The Town will notify each Proposer whose Offer is in the Competitive Range or made the 'short list' and provide in writing any questions or requests for clarification to the Proposer. Each Proposer so notified may be interviewed by the Town and asked to discuss answers to written or oral questions or provide clarifications to any facet of its Offer. The Proposers in the competitive range may be required to provide a demonstration of their product.
2. Demonstrations - Proposers in the competitive range may be invited to construct a hands-on sample or presentation of their solution at the Town of Gilbert. In addition, each finalist may prepare and deliver a presentation of their proposed solution based on the script developed by the evaluation panel. The Town may also require a hands-on lab demonstration designed specifically for the evaluation panel. The results of the surveys will be tabulated and delivered to the evaluation team for the final review and solution selection session(s).
3. If an Offer in the Competitive Range contains conditions, exceptions, reservations or understandings to or about any Contract or Solicitation requirement, the Town may discuss or negotiate the conditions, exceptions, reservations or understandings during these meetings. But the Town in its sole discretion may reject any and all conditions, exceptions, reservations and understandings, and the Town may instruct any Proposer to remove the conditions, exceptions, reservations or understandings. If the Proposer fails to do so, the Town may determine the Offer is nonresponsive, and the Town may revoke its determination that the Offer is in the Competitive Range.
4. To the fullest extent permitted by law, the Town will not provide any information, financial or otherwise, to any Proposer about other Offers received in response to this solicitation. During discussions with Proposers in the Competitive Range, the Town will not give Proposers specific prices or specific financial requirements that Proposers must meet to qualify for further consideration. The Town may state that proposed prices are too high with respect to the marketplace or otherwise unacceptable. Proposers will not be told of their relative rankings before Contract award.

3.2.4. Disqualification

If the firm, business or person submitting this proposal has been debarred, suspended or otherwise lawfully precluded from participating in any public procurement activity, including being disapproved as a subcontractor with any federal, state or local government, or if any such preclusion from participation from any public procurement activity is currently pending, the Proposer shall fully explain the circumstances relating to the preclusion or proposed preclusion in the proposal. The Proposer shall include a letter with its proposal setting forth the name and address of the governmental entity, the effective date of this suspension or debarment, the duration of the suspension or debarment, and the relevant circumstances relating to the suspension or debarment. If suspension or debarment is currently pending, a detailed description of all relevant circumstances including the details enumerated above shall be provided.

Any or all proposals will be rejected if there is any reason for believing that collusion exists among the Proposers, and participants in such collusion will not be considered in future proposals for the same work.

4. Solicitation Terms and Conditions

GENERAL CONDITIONS

Agreement Term; Renewal. If funds for this Agreement are not appropriated or budgeted by October 1, 2021, Gilbert may terminate this Agreement by giving written notice to Contractor. Otherwise, The Agreement term commences upon execution of the Agreement and continues through October 19, 2022. The Agreement may be renewed for up to one (1) additional 2-year terms upon mutual agreement of the parties. The Agreement may be renewed upon written approval of Gilbert's Purchasing Officer if: (1) the renewal Agreement amount does not exceed \$100,000; or (2) the original prices remain in effect during the renewal term. If at least 60 days prior to the end of the original term the Contractor requests a price adjustment, Contractor shall submit evidence of increased costs to Gilbert. Any price adjustment shall be in the sole discretion of Gilbert and shall not exceed the amount of increased cost to the Contractor. Price adjustment requests shall be a factor in the Agreement extension review process. A price adjustment less than 10% of the original Agreement price may be approved by the Purchasing Officer. The Gilbert Council must approve renewal in all other cases. Any renewal shall be in writing and shall expressly state the prices for the services during the renewal term. Any renewal shall be contingent on funds being appropriated or budgeted for the renewal term.

Contingent Award. Submittal of the required Bonds as set forth in this paragraph is a condition precedent to this Agreement becoming effective.

Cooperative Use of Agreement: In addition to the Town of Gilbert and with the approval of the Contractor, this Agreement may be extended for use by other municipalities, school districts, and government agencies of the State. A current listing of eligible entities may be found at www.mesaaz.gov/business/purchasing/save. Any such usage by other entities must be in accordance with the ordinance, charter and /or procurement rules and regulations of the respective political entity.

Protests: Pursuant to the Municipal Code Section 2-368, an interested party may protest a solicitation by filing a protest in writing to the purchasing officer not fewer than five days before the closing date and time of the solicitation. An unsuccessful Proposer or Bidder may protest a determination of nonresponsiveness or nonresponsibility by the Town by filing a protest in writing with the purchasing office not more than five days after issuance of notice of such determination by the Town. An unsuccessful Proposer or Bidder may protest a contract award by filing a protest in writing with the purchasing office not more than five days after issuance of a notice of apparent low responsive and responsible Bidder, or a notice of intent to award. The protest shall include the following information: (1) The name, address and telephone number of the protester; (2) Identification of the contracting activity and the number of the solicitation; (3) The signature of the protester or its authorized representative; (4) A detailed statement of the legal and factual grounds of the protest, including copies of relevant documents; and (5) The specific relief requested.

Notwithstanding the foregoing, Proposers may discuss this Solicitation with the Mayor or a member of the Gilbert Town Council, provided such meetings are scheduled through the Procurement Officer listed on this Solicitation, conducted in person at 50 E. Civic Center Drive, Gilbert, Arizona 85296, and are posted as open meetings by the Town Clerk at least twenty-four (24) hours prior to the scheduled meetings. The posted notice shall identify the participants and the subject matter, as well as invite the public to participate.

This policy is intended to create a level playing field for all Proposers, assure that contracts are awarded in public, and protect the integrity of the selection process. **Proposers who violate this policy shall be disqualified from participating in this Solicitation.**