

Evaluation Matrix for RLI No. R0985702R1
RLI Title: Marketing and Distribution of Promotional Items

Evaluation Criteria	Eliassen and Associates	Proforma	STAT Promo Solutions	TNT Promotions dba Sharp Marketing
Project-Specific Criteria				
1. Provide a description of the firms available services – categories of promotional items – abilities to print / screen items and color processes	“Full promotional products supplier”	Creative services, branded merchandise and programs, printing solutions, eCommerce/company store technology, multimedia, total project management	“TD Promotions, Inc. dba STAT Promo Solutions. We can Silk Screen both Spot and Full Color Process, False Process as well as Embroider any project.”	Over 400,000 individual promotional items. Decorating services: embroidery, screen printing, sublimation, transfer, laser etching, decals, rhinestones.
2. Provide examples/experience, over a minimum period of the past 3 years, on projects with similar variability in scope and size. Include the following: a. Type of product b. Volume and Dollar value c. Name of Company/entity d. Address e. Contact name f. Contact e-mail and phone number g. Dates of Commencement and Completion	See Attached Reference Spreadsheet	Provided a list of companies but no contact information.	See Attached Reference Spreadsheet	See Attached Reference Spreadsheet
3. Provide a list of Current projects with similar variability in scope and size. Include the following: a. Type of product b. Volume and Dollar value c. Name of Company/entity d. Address e. Contact name f. Contact e-mail and phone number g. Date of Commencement	See Attached Reference Spreadsheet	Provided a list of companies but no contact information.	See Attached Reference Spreadsheet	See Attached Reference Spreadsheet.
4. Provide examples of turn-around time for various categories of promotional items	Stock to 90 days; depending on the item	In-stock merchandise: orders entered prior to 2:00 ET is	Domestic apparel and promotional Items – 2 to 3 weeks	Embroidery – 5 to 7 business days Screen Painted – 7 to 10 business

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		processed and shipped the same day. Turnaround times for custom items vary from a couple days to several months.	from art approval. Overseas apparel and promotional items – 8 to 12 weeks from art approval. Rush production available on an as needed basis.	days Heat Transfers – 7 to 10 business days Apparel/bags – 7 to 10 business days OEM design and manufacturing – lead time is based on scope of project Other items – lead time average is 7 to 14 business days
5. Describe the process for the purchase of logo items	<ol style="list-style-type: none"> 1. Receive PO 2. Receive art or create art 3. E-proof for approval 4. Sample for approval 5. Deliver product 	Orders can be accepted via electronic and telecommunications processes. All logos and artwork are maintained for easy reordering. Has ability to develop a customized online purchasing site.	“Product identification and sourcing, artwork creation, estimate of charges, client cost/art proof approval, submission to factory, pre-production proof approval, production, delivery and invoicing.”	<p>Non-OEM Logo Items</p> <ol style="list-style-type: none"> 1. Contact Company 2. Request quote or product ideas 3. Formal quote and mock up 4. Sample provided (if requested) 5. Confirmation of order with purchase order 6. Final approval phase 7. Item ordered or produced 8. Deliver product <p>OEM Promotional Items</p> <ol style="list-style-type: none"> 1. Meet with client re budget and marketing goals 2. Create ideas 3. Meet with client to finalize promotional item 4. Make changes or modifications to product design 5. Formal quote and final design 6. Sample production and review

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				7. Confirmation of order with purchase order 8. Final approval phase 9. Order raw materials 10. Manufacture product 11. Deliver product
6. Provide experience with maintaining an on-line store. Including: a. Website address – www._____ b. Provide a description of how a site is set up	http://fortlauderdalecvb.promoshop.com/featureproduct/index.aspx?DPS_V_Id=1141700 We utilize ASI services under their LOGOMALL group to add customer on-line stores. For more graphics, more items, users and reporting, thus a more complicated site we use a company called eBLOX. Both Logomall and Ebox handle the technical end and all orders would be sent direct to our location to be processed. Either one is extremely simple to set up and can be set up in 48hrs or less.	www.proforma.com/sherwinwilliams www.proforma.com/resers Works closely with staff to customize the site. Phases of implementation include: Analysis and Design, Construction, User Acceptance Testing and Training, Deployment, and Ongoing Maintenance.	www.statpromo.com “Equipped with shopping cart capability for over 200,000 products. Secure web-server, with on line custom image generator.”	Currently manages 13 online stores including: www.shopbaseballalumni.com www.shopnfla.com Steps for developing on-line store: 1. Meet with client 2. Design team works with client to develop theme 3. Secure http website for the store 4. Develop website 5. Client product selections 6. Load products onto website 7. Testing 8. Go live
7. Provide a description of warehouse space including: a. Location(s) b. Square Footage c. Inventory / Storage Process d. Mailing / Shipping Capabilities/Process	902 N. Flagler Drive, Ft Lauderdale 33304 850 sq. feet Eliassen location Daily shipping Corporate Containers, Sunrise, FL “Over 10K of full warehouse, logistics, delivery. Our warehouse partner.”	Did not include location and square footage of warehouse space. “We have immediate access to Proforma and preferred supplier-owned warehousing facilities within one hour of all metropolitan areas of North America. These facilities are integrated through our company store technology and can be seamlessly incorporated into your program at any time to meet your needs.”	8550 NW 47 Court, Lauderhill, FL (Office) 600 sq. feet (more available off site) File and pick by SKU number, inventory tracking and control. Small scale UPS, FedEx and USPS. Large via container/ship rail and overland truckline. Door to door inside delivery.	655 West Prospect Road Fort Lauderdale, FL 33309 4,000 sq. feet – air conditioned Full-time warehouse staff. Products and inventoried upon receipt. Each on-line store has its own geographical warehouse space. Inventory levels and shipping statistics are kept on an inventory management system. Full-time shipping staff. Capable of shipping over 200 packages a

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				day. UPS/USPS/FedEx.
<p>8. Does your company use a database management system?</p> <p>a. If yes, what system?</p> <p>b. Can you develop, maintain, and print a computerized database of mailing lists, storage items, inventory control and telecommunication activities?</p> <p>c. If yes describe the process and associated fees</p>	<p>YES. Act, Fedex Office</p> <p>YES.</p> <p>No fee for standard mailing list; fees for mass mailing.</p>	<p>YES. Core Inventory Management Software.</p> <p>Offers customized reporting that can be tailored to individual needs.</p>	<p>NO.</p> <p>NO. "Not at this time. Can activate Pro-Mail Software and Web-Hosting if needed. Can also use functions on Web Hosting and E-commerce software when needed."</p>	<p>YES. OScommerce & Intuit Quickbooks for Enterprise Solutions.</p> <p>"We can develop, maintain, and print a computerized database of mailing list, storage items, and inventory control and telecommunications activities if required by client."</p> <p>"Websites create their own database if client request this service with mailing address and website addresses. No additional fees."</p>
<p>9. Provide a description of account management processes</p>	<p>Firm stated, "Unclear what this pertains to?"</p>	<p>Uses a local and corporate account management model. National Account Manager Steve Tupler is based in the Hollywood Office and works directly with clients. Support staff in the Cleveland, Ohio support center provides technology resources, credit management, and product sourcing, and administrative and creative marketing assistance.</p>	<p>"Quickbooks estimates, purchase orders, invoices. Outlook for email service and MS Office for Excel, Word for documents. Adobe Acrobat for east presentations and Powerpoint for more complex."</p>	<ol style="list-style-type: none"> 1. Each client is given an account manager depending on product scope. 2. Account Manager handles all aspects of sales order. 3. Graphic design department work with Account Manager to develop product virtuals and logo creation. 4. Account Manager is key contact point for Client. 5. Data entry processes order and follows up with shipments. 6. Shipping Department receives goods and inspects all products for accuracy and quality.

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				<p>7. Client is contact by Account Manager with shipping information.</p> <p>8. Account Manger follows up with Client to confirm client's satisfaction.</p>
Company Profile				
1. Supply legal firm name, headquarters address, local office addresses, state of incorporation, and key firm contact names with their phone numbers and e-mail addresses.	Eliassen & Associates, Inc. 902 N. Flagler Drive Fort Lauderdale, FL 33304 State of Incorporation: Florida Contact: Adria Eliassen, President 954-566-6166 adria@eliasseninc.com	Creative Successories dba Proforma Creative Successories 3389 Sheridan Street, #55 Hollywood, FL 33021 State of Incorporation: Florida Contact: Steven Tupler 954-347-9347 Steve.tupler@proforma.com	TD Promotions, Inc. dba STAT Promo Solutions 8550 NW 47 Court Lauderhill, FL 33351 State of Incorporation: Florida Contact: Thomas Van Note, President 954-748-4019 tdpromo@comcast.net	TNT Promotions, Inc. dba Sharp Marketing 655 West Prospect Road Fort Lauderdale, FL 33309 State of Incorporation: Florida www.sharpmarketing.com Phone: 954-565-2711 Fax: 954-565-2775 Key Personnel: Susan Ernewein, President Greg Ernewein, Vice President Donna Cibotti, Apparel/Embroidery/Printing Necia Irwin, Specialty Products Jessica Rosiles, Graphic Designer and Webmaster Tom Alfonso, Shipping/Warehouse/Delivery
2. Supply the interested firm's federal ID number and Dun and Bradstreet number.	EIN 65-0998431 D&B #016161874	Federal Tax ID #27-347-3657 D&B # 84-740-8168 (stopped subscribing to D&B in 2006)	FEID: 200026206 D&B # 170626407	Federal Tax ID #65-0228653 D&B # 84-797-5372
3. Is the interested firm legally authorized, pursuant to the requirements of the Florida Statutes, to do business in the State of Florida?	"YES"	"YES"	"YES"	"YES"

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<p>4. All firms are required to provide Broward County the firm's financial statements at the time of submittal in order to demonstrate the firm's financial capabilities. Failure to provide this information at the time of submittal may result in a recommendation by the Director of Purchasing that the response is non-responsive. Each firm shall submit its most recent two (2) years of financial statements for review. The financial statements are not required to be audited financial statements. With respect to the number of years of financial statements required by this RLI, the firm must fully disclose the information for all years available; provided, however, that if the firm has been in business for less than the required number of years, then the firm must disclose for all years of the required period that the firm has been in business, including any partial year-to-date financial statements. The County may consider the unavailability of the most recent year's financial statements and whether the firm acted in good faith in disclosing the financial documents in its evaluation. Any claim of confidentiality on financial statements should be asserted at the time of submittal. (see below)</p> <p>*****ONLY "IF" claiming Confidentiality*****</p> <p>The financial statements should be submitted in a separate bound document labeled "Name of Firm, Attachment to Proposal Package, RLI# - Confidential Matter". The firm must identify the specific statute that authorizes the exemption from the Public Records Law. CD or DVD discs included in the submittal must also comply with this requirement and</p>	See memo from Accounting	See memo from Accounting	See memo from Accounting	See memo from Accounting
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<p>separate any materials claimed to be confidential.</p> <p><u>Failure to provide this information at the time of submittal and in the manner required above may result in a recommendation by the Director of Purchasing that the response is non-responsive. Furthermore, proposer's failure to provide the information as instructed may lead to the information becoming public.</u></p> <p>Please note that the financial statement exemption provided for in Section 119.071(1) c, Florida Statutes only applies to submittals in response to a solicitation for a "public works" project.</p>				
<p>5. Litigation History Requirement:</p> <p>The County will consider a vendor's litigation history information in its review and determination of responsibility. All vendors are required to disclose to the County all "material" cases pending, filed or resolved in the three (3) year period ending with the solicitation response due date, whether such cases were brought by or against the vendor, any parent or subsidiary of the vendor, or any predecessor organization. If the vendor is a joint venture, the information provided should encompass the joint venture (if it is not newly-formed for purposes of responding to the solicitation) and each of the entities forming the joint venture. For purpose of this disclosure requirement, a "case" includes lawsuits, administrative hearings and arbitrations. A case is considered to be "material" if it relates, in whole or</p>	<p>None.</p>	<p>"No litigation or proceeding is pending or threatened against Proforma Creative Successories or PFG Ventures dba Proforma before any current or any administrative agency which is reasonably expected to have a material adverse effect of Proforma Creative Successories of PFG Ventures dba Proforma."</p>	<p>"NO LITIGATION OF ANY KIND"</p>	<p>"TNT Promotions, Inc. has no history of litigation."</p>

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<p>in part, to any of the following:</p> <ol style="list-style-type: none">1. A similar type of work that the vendor is seeking to perform for the County under the current solicitation;2. An allegation of negligence, error or omissions, or malpractice against the vendor or any of its principals or agents who would be performing work under the current solicitation;3. A vendor's default, termination, suspension, failure to perform, or improper performance in connection with any contract;4. The financial condition of the vendor, including any bankruptcy petition (voluntary and involuntary) or receivership; or5. A criminal proceeding or hearing concerning business-related offenses in which the vendor or its principals (including officers) were/are defendants. <p>Notwithstanding the descriptions listed in paragraphs 1 – 5 above, a case is not considered to be "material" if the claims raised in the case involve only garnishment, auto negligence, personal injury, workers' compensation, foreclosure or a proof of claim filed by the vendor.</p> <p>For each material case, the vendor is required to provide all information identified, on the "Litigation History" form. (Attachment J)</p> <p>Failure to disclose any material case, or to provide all requested information in connection with each such case, may result in the vendor being deemed non-responsive. Prior to making such</p>				
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determination, the vendor will have the ability to clarify the submittal and to explain why an undisclosed case is not material.				
6. Has the interested firm, its principals, officers, or predecessor organization(s) been debarred or suspended from bidding by any government during the last three (3) years? If yes, provide details.	"NO"	"NO"	"NO"	"NO"
7. Has your company ever failed to complete any work awarded to you? If so, where and why?	"NO"	"NO"	"NO"	"NO"
8. Has your company ever been terminated from a contract? If so, where and why?	"NO"	"NO"	"NO"	"NO"
9. Insurance Requirements: Refer to the sample Certificate of Insurance Attachment K. It reflects the insurance requirements deemed necessary for this project. It is not necessary to have this level of insurance in effect at the time of submittal but it is necessary to submit certificates indicating that the firm currently carries the insurance or to submit a letter from the carrier indicating upgrade availability.	Provided proof of current general liability insurance coverage and a Statement of Workers Exemption Liability.	Provided proof of current commercial general liability insurance.	Provided proof of current general liability insurance and letter stating exemption from Worker's Compensation Insurance Requirement.	Provided proof of current general liability, worker's compensation and vehicle insurance.
Legal Requirements				
1. Standard Agreement Language: Identify any standard terms and conditions with which the interested firm cannot agree. The standard terms and conditions for the resulting contract can be located at: http://www.broward.org/Purchasing/Documents/c af101.pdf If you do not have computer access to the internet, call the Project Manager for this RLI to arrange for	"YES (Agree)"	"YES (Agree)"	"YES (Agree)"	"YES (Agree)"

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mailing, pick up, or facsimile transmission.				
2. Cone of Silence: This County's ordinance prohibits certain communications among vendors, county staff, and selection committee members. Identify any violations of this ordinance by any members of the responding firm or its joint venturers. The firm(s) submitting is expected to sign and notarize the Cone of Silence Certification (Attachment L) .	Provided signed and notarized Cone of Silence Certification.	Provided signed and notarized Cone of Silence Certification.	Provided signed and notarized Cone of Silence Certification.	Provided signed and notarized Cone of Silence Certification.
3. Public Entity Crimes Statement: A person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit an offer to perform work as a consultant or contract with a public entity, and may not transact business with Broward County for a period of 36 months from the date of being placed on the convicted vendor list. Submit a statement fully describing any violations of this statute by members of the interested firm or its joint venturers.	"Eliassen & Assoc. Inc. agrees to this statement and will not violate this statute and does not have any former violations to this statute by firm or any joint venture."	"None"	"NONE"	"No Violations"
4. No Contingency Fees: By responding to this solicitation, each firm warrants that it has not and will not pay a contingency fee to any company or person, other than a bona fide employee working solely for the firm, to secure an agreement pursuant to this solicitation. For Breach or violation of this provision, County shall have the right to reject the firm's response or terminate any agreement awarded without liability at its discretion, or to deduct from the agreement price or otherwise recover the full amount of such fee, commission, percentage, gift, or consideration. Submit an attesting statement warranting that the	"Eliassen & Assoc. Inc. has not and will not pay a contingency fee to any company or person, other than a bona fide employee working solely for the firm to secure and agreement pursuant to this solicitation."	"None. No Contingency Fees are applicable."	"TD Promotions, Inc. dba STAT Promo Solutions hereby attests and warrants that we have not and will not pay a contingency to any company or person, other than a bona fide employee working solely for TD Promotions, Inc. dba STAT Promo Solutions, our firm, to secure an agreement pursuant to this solicitation or any other work with the County."	"TNT Promotions, Inc, /d.b.a. Sharp Marketing has not and will not pay contingency fees to any company or person."

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Responder has not and will not pay a contingency fee to any company or person, other than a bona fide employee working solely for the firm, to secure an agreement pursuant to this solicitation.				
<p>5. <input type="checkbox"/> If this box is checked, then the provisions of the Broward County Living Wage Ordinance 2008-45, as amended, (“Living Wage Ordinance”) will apply to this agreement. in accordance with the living wage ordinance, certain employers who do business with the county shall pay a living wage to its employees who work on service contracts providing covered services identified under the living wage ordinance.</p> <p>(Attachment M)</p> <p>(If living wage applies, check this statement and include the living wage attachment to the RLI solicitation)</p>				
<p>6. DRUG FREE WORKPLACE:</p> <p>1. Do you have a drug free workplace policy?</p> <p>2. If so, please provide a copy of your drug free workplace policy in your proposal.</p> <p>3. Does your drug free workplace policy comply with Section 287.087 of the Florida Statutes?</p> <p>4. If your drug free workplace policy complies with Section 287.087 of the Florida Statutes, please complete the Drug Free Workplace Policy Certification Form. Attachment N</p> <p>5. If your drug free workplace policy does not comply with Section 287.087 of the Florida Statutes, does it comply with the drug free workplace requirements pursuant to Section 21.31.a.2 of the</p>	<p>YES.</p> <p>Provided copy of Substance Abuse Program and a Drug-Free Workplace Policy Acknowledgment form.</p> <p>YES.</p> <p>YES. Provided a signed and notarized Drug Free Workplace Policy Certification.</p>	<p>“YES”</p> <p>Provided a section of company’s handbook dealing with drug and alcohol use.</p> <p>“YES”</p> <p>“YES” Provided a signed and notarized Drug Free Workplace Policy Certification.</p>	<p>Provided notarized Drug Free Workplace Policy Certification.</p>	<p>“YES”</p> <p>Provided Drug-free Workplace Policy</p> <p>“YES”</p> <p>“YES” Provided notarized Drug Free Workplace Policy Certification.</p>

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<p>Broward County Procurement Code?</p> <p>6. If so, please complete the attached Drug Free Workplace Policy Certification Form.</p> <p>7. If your drug free workplace policy does not comply with Section 21.31.a.2 of the Broward County Procurement Code, are you willing to comply with the requirements Section 21.31.a.2 of the Broward County Procurement Code?</p> <p>8. If so, please complete the attached Drug Free Workplace Policy Certification Form. (Attachment N)</p> <p>Failure to provide a notarized Certification Form in your proposal indicating your compliance or willingness to comply with Broward County's Drug Free Workplace requirements as stated in Section 21.31.a.2 of the Broward County Procurement Code may result in your firm being ineligible to be awarded a contract pursuant to Broward County's Drug Free Workplace Ordinance and Procurement Code</p>		<p>"YES"</p>	<p>"NO"</p> <p>"We affirm our willingness to comply with Broward County's Drug Free Workplace requirements."</p>	<p>"YES"</p>
<p>7. Non-Collusion Statement: By responding to this solicitation, the vendor certifies that this offer is made independently and free from collusion. Vendor shall disclose on the "Non-Collusion Statement Form" (Attachment O) to their best knowledge, any Broward County officer or employee, or any relative of any such officer or employee as defined in Section 112.3135(1) (c), Florida Statutes (1989), who is an officer or director of, or had a material interest in, the vendor's business, who is in a position to influence this</p>	<p>Provided signed Non-Collusion Statement Form. Did not identify any names/relationships.</p>	<p>Provided signed Non-Collusion Statement Form. Did not identify any names/relationships.</p>	<p>Provided signed Non-Collusion Statement Form. Did not identify any names/relationships.</p>	<p>"TNT Promotions, Inc, /d.b.a. Sharp Marketing has not engaged in any collusion." Provided signed Non-Collusion Statement Form. Did not identify any names/relationships.</p>

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procurement. Any Broward County officer or employee who has any input into the writing of specifications or requirements, solicitation of offers, decision to award, evaluation of offers, or any other activity pertinent to this procurement is presumed, for purposes hereof, a person has a material interest if they directly or indirectly own more than 5 percent of the total assets or capital stock of any business entity, or if they otherwise stand to personally gain if the contract is awarded to this vendor. Failure of a vendor to disclose any relationship described herein shall be reason for debarment in accordance with the provisions of the Broward County Procurement Code.				
<p>8. Scrutinized Companies List Certification: Any company, principals, or owners on the Scrutinized Companies with Activities in Sudan List or on the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List is prohibited from submitting a bid, proposal or response to a Broward County solicitation for goods or services in an amount equal to or greater than \$1 million. Therefore, if applicable, each company submitting a bid, proposal or response to a solicitation must certify to the County that it is not on either list at the time of submitting a bid, proposal or response. The certification form is referenced as “Scrutinized Companies List Certification” (Attachment P) and should be completed and submitted with your proposal but must be completed and submitted prior to award.</p>	Provided notarized form.	Provided notarized form.	Provided notarized form.	<p>“TNT Promotions, Inc, /d.b.a. Sharp Marketing, principals or owners are not on the Scrutinized Companies List.” Provided notarized form.</p>