



Project Name: Exhibit and Interpretive Concept Facilitation Services for the “New Experience for Children and Families” II RFP 2021

Project Number: 2021-01-042

Issue for Bid

Project Manual

Date: November 17, 2021

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TABLE OF CONTENTS

INVITATION TO BIDDERS..... 3

PROJECT Exhibit and Interpretive Concept Facilitation Services for the “New Experience for Children and Families RFP 2021 3

SCOPE OF WORK 3

PROJECT DEFINITION..... 5

REQUEST FOR BID 10

APPENDIX A STIPULATED SUM BID FORM 13

APPENDIX B STATE OF MISSOURI EXEMPTION FROM MISSOURI SALES AND USE TAX ON PURCHASES..... 17

APPENDIX C POLICY ON MINORITY AND BUSINESS PARTICIPATION ON SAINT LOUIS ZOO CONTRACTS.....18

INVITATION TO BIDDERS

PROJECT

Exhibit and Interpretive Concept Facilitation Services for the “New Experience for Children and Families”. RFP 2021

SCOPE OF WORK

The Saint Louis Zoo (“Zoo”) is seeking proposals from a consultant with strong zoological and interpretive experience with families and young children, to facilitate the interpretive design process and plan for the “New Experience for Children and Families.” This Interpretive Plan will then inform the concept design for the development of the final exhibit experience. The Zoo has three full-time Conservation Audience Research and Evaluation (CARE) staff who can work with the selected vendor directly or offer access to any current understanding we have of our guest, member and community audiences, which is substantial. Informed by the Saint Louis Zoo’s Interpretive Master Plan, CARE data and results of Front-end Evaluations as well as early childhood experience of the Zoo staff, the consultant will facilitate the interpretive plan for this exhibit, including:

- Assist the Saint Louis Zoo by clarifying the roles of the Interpretive Core Team members
- Facilitate the Core Team’s discussion to establish, refine and confirm the big idea/main message, overall goals and target audience for the exhibit.
- Facilitate discussions and reach decisions relating to themes, topics, messages and learn/feel/do for each exhibit component.
- Facilitate discussions to develop an interpretive plan framework in context, and identify with input from the core team a draft collection plan to support that framework.
- Utilize data from the Family Engagement Sessions, described below, to inform your interpretive plan.

The Saint Louis Zoo has enlisted a vendor to gather community input for the development of the “New Experience for Children and Families” by engaging a diverse cross section of the metro population, both in demographic background and range of abilities. The vendor’s deliverables are to gather community ideation and creation of exhibit elements and messages, prototyping with proposed exhibit elements and messages, and to have families providing final input on exhibit design and thematic messaging.

- Initiate facilitation of concept design meetings, working with the Zoo’s in-house design team to design landscape and architectural elements.

- Facilitate discussions to produce a narrative for the exhibit.
- Ensure all interpretive elements are developmentally and experientially appropriate for the target audience.
- Ensure all interpretive elements are developed with the ability to evaluate the effectiveness of the goals and objectives.

Project Design Goals:

- Goal 1- Provide an Interpretive Plan to inform an Experience Concept Plan.
- Goal 2- Stay within project budget and business outcomes.
- Goal 3- Meet with the core team eight times, and to provide eight progress reports that include: work performed, work yet-to-be performed, anticipated challenges, and significant deviation from the previously agreed upon Project Schedule
- Goal 4- To adhere to the Project Schedule provided in your RFP.

Due to the ongoing COVID-19 pandemic, the Zoo understands that some sessions may need to be moved to a virtual format. While the Zoo prefers these sessions to be in-person, we will work with the selected vendor and the Zoo’s COVID safety taskforce to determine final session methodologies, based on recommended safety protocols at that time.

Deliverables

A deliverable of an Interpretive Plan must be received by May 30, 2022.

Anticipated project timeline *(Final dates to be determined)*

This plan includes:

1. *A Big Idea, Themes, Topics, Messages, Storylines, Learn Feel and Do’s,*
2. *A Vision Statement and a supporting Narrative of the exhibit flow and experience concepts to support #1*
3. *A draft collection plan to support #2*

January 2022 – Begin Facilitation Meetings

January 2022 through May 2022 - provide eight meetings and respective progress reports.

May 2022 – Provide Deliverables

PROJECT DEFINITION

Saint Louis Zoo Mission

To conserve animals and their habitats through animal management, research, recreation and educational programs that encourage the support and enrich the experience of the public.

Background

In August 2020, the Saint Louis Zoo announced the closure of the Emerson Children's Zoo. Zoo staff are currently working to reimagine and design the 2.7-acre family and children's area, while a temporary dinosaur exhibit (Dinoroarus) opened in its place in spring 2021.

Project Description

The Saint Louis Zoo is an established zoological society led by passionate staff and board members. The Zoo is seeking a consultant/vendor with forward-thinking and creative ideation around engaging guests in new experiences that are inclusive and accessible and based on innovative design-thinking for the “New Experience for Children and Families.”

The Saint Louis Zoo is also passionate about animal welfare and ensuring design decisions benefit guests and resident animals alike. The Zoo is seeking an engaged partner who can clearly communicate and collaborate with the Saint Louis Zoo’s New Experience for Children and Families core planning team throughout the design process.

The Saint Louis Zoo is currently requesting proposals from creative agencies with experience in interpretive concept development and zoological interpretive exhibition design development. The work specific to this RFP is for an interpretive plan for a new, 2.7-acre experience that integrates children's play space with animal habitats, the “New Experience for Children and Families.”

The primary audience for this project will be children ages birth to eight years of age and their families. The project elements are expected to be installed for a period of fifteen years with very high use.

The “New Experience for Children and Families,” will be an exciting and unique place for children and their families to have fun, and engage with team members and animals. This dynamic experience will integrate children's play spaces with positive emotional experiences with animals.

Designed in partnership with child development experts and animal experts, this exhibit will support children’s developmental needs at each life stage within the articulated target

audience while offering a safe space that is welcoming, accessible and inclusive. It will be filled with year-round opportunities for adventure, play and learning intended to foster a child's sense of wonder and awe about animals and the natural world and promote the development of caring attitudes and behaviors toward animals and nature.

The "New Experience for Children and Families," will invite children into the Saint Louis Zoo's mission by increasing their awareness of the natural world and helping them deepen their understanding of animals through close observation, imitation, play and opportunities for imaginative play. These experiences will encourage them to build empathy and respect for animals beginning at an early age.

More broadly, children will connect with the natural world as a place where they belong and recognize that they have the ability and responsibility in making sure it is protected. This exhibit is intended to foster a child's sense of agency – helping them understand that their decisions and actions make an impact on the world.

This exhibit will also support the Saint Louis Zoo's goals by encouraging repeat visitation and sustained participation in the full range of zoo programs and conservation campaigns – all with an eye toward advancing our interpretive goals of: animal welfare, global wildlife conservation, a sustainable future for wildlife, wild places and other natural resources, an emotional connection to animals and the guests power to effect a positive change through conservation action.

Working Big Idea: Close positive encounters with animals and their caretakers engenders empathy for animals and nature resulting in conservation action.

Working Exhibit Goals:

- Provide interactive "WOW" experiences with animals and people that are accessible and inclusive.
- Provide fun/emotional kinesthetic experiences for families that result in an emotional connection to animals and empower guests to affect a positive change through conservation action.
- Inspire conservation action
- Incorporate exceptional animal welfare
- Provide a dedicated premier animal encounter space (VIP/BTS and private events)
- Develop state of the art learning spaces with incorporated innovative technology and integrated/adjacent animal habitats

Working "Knows": Many animals live in different kinds of diverse families just like us.

They have fascinating behaviors similar to ours. People, animals and the environment are all connected. The Zoo conserves animals and their habitats.

- Premier innovative animal habitats will develop strong cognitive connections via multisensory close positive animal and staff experiences featuring various kinds of animal families. Visit with a meerkat, squirrel monkey, macaw, lemur or coati families. Discover how the animal families work and play together just like us. How do they communicate with each other and what role do each play in the family and the community?
- New state of the art adjacent education programming spaces with incorporated technology and animal habitats that will engage children and their families on topic specific curricula.

Working “Feel”: Emotionally connected with the animals through up-close and touchable encounters, imagine what it might be like to have the unique super-powers of some animals and be awed by their diversity.

- Families will have various opportunities to interact with and perhaps feed or touch tortoises, goats, capybara, jellyfish, or mara. Staff members will activate the imagination of families with stories of individual animals and encourage close observation and empathetic interactions.
- Animal encounter surprises such as coatis, lemurs or alpaca may cross the path while squirrel monkeys climb overhead and a family of macaw fly above.
- Families and others can participate in premium animal interactions in a new designated animal encounter space with tamanduas, sloths, prehensile tailed porcupines, and others.
- Educational groups will feel empathy towards animals, feel inspired to help wildlife near their homes and feel excited to learn more about wildlife and wild places.

Working “Dos”: Engage in active, hands-on, play experiences with animals, technology, and each other and be inspired to act.

- Innovative technologies will be utilized to supplement live animal experiences that successfully engage families throughout.
- Play and exploration will be incorporated throughout. Families can get wet like a frog, climb like a sloth, and dig like a meerkat, investigate a giant bird’s nest or slide down a vine (zip line) like a monkey.
- Practice what you can do and be a nature hero inspired to act.
- Do specific conservation action on site.

The Saint Louis Zoo would like to offer your organization the opportunity to bid on this project and make recommendations to the Zoo for reimagining the former Children's Zoo. This is an exciting opportunity to help the Zoo achieve its mission of conserving animals and their habitats through animal management, research, recreation and educational programs that encourage the support and enrich the experience of the public.

INSTRUCTIONS FOR PROPOSAL PREPARATION

Submittals should contain the following information:

- A one-page letter of interest that includes a synopsis of qualifications and primary specialties, the primary contact or lead representing the contractual authority and the primary contact or lead representing the main point of contact for the work (may be the same person).
- Profile(s), including number of employees, location, and relevant experience working on similar projects within the last five (5) years, including:
 - Name of the client (include contact information)
 - Description of projects
 - Key personnel involved and year the project was completed
- A general narrative used to achieve the deliverables.
- Resumes of key team members identified by the respondent(s) as having a major role. Resumes can be any format that summarizes qualifications, may not be longer than two (2) pages per person.
- If applicable, an organizational chart showing the prime consultant, the proposed relationships between key personnel and support staff and/or sub consultants who are expected to participate on the project, and which aspects of the work each person will be responsible for performing.
- Disclose any material agreements, relationships, or employment your firm or team members have with Saint Louis Zoo that may create a conflict of interest or the appearance thereof.
- Include copies of your firm's most recent Equal Opportunity form (EEO-1) and Affirmative Action policies, if applicable.
- Explain how communication during the course of the project and support provided after report delivery will be handled.

Criteria for selection

The Zoo's Selection Committee will consider the prior experience related to scope of work, responsiveness to proposal elements, W/MBE status, locality and the budget in selection of the successful Bidder.

BID DOCUMENTS

Bid Documents will be available on **November 17, 2018** at: stlzoo.org/vendor

MANDATORY PRE-BID MEETING & SITE INSPECTION

A **mandatory** pre-bid meeting will be held at **11:00 AM CST on December 2, 2021** via Zoom meeting. To access:

- Register in advance for this meeting:
<https://stlzoo.zoom.us/meeting/register/tZEkc-2sqjMpGNKghJFznNw4afQ5tPXxOEMf>

After registering, you will receive a confirmation email containing information about joining the meeting.

PROPOSAL QUESTIONS

All questions must be received by **December 8, 2021** for issuing of addendums. All emailed questions and answers will be shared with all responders. The source of the questions will remain anonymous. Addendums will be placed on the Zoo website as they become available: stlzoo.org/vendor. Any oral responses shall be unofficial and not binding on the Zoo.

BID DATE

Proposals will be accepted on or before **2:00 PM CST on December 15, 2021**. Only electronic submissions will be accepted. Please submit the Proposal as a single pdf to the following link:
<https://stlzoopoc.egnyte.com/ul/L1MMY1Tijv>

To ensure ease of submission, consider uploading well ahead of the deadline time. Late submissions will not be accepted.

Any submitted proposal shall remain valid and subject to acceptance for ninety (90) days after the proposal due date

NOTE: Failure to include a completed MBE/WBE participation form will result in participation recorded as NONRESPONSIVE/ DISQUALIFIED at bid opening.

ZOO CONTACTS

Questions concerning this solicitation shall be submitted via email to Candace Bingham, Director of Procurement at cbingham@stlzoo.org.

REQUEST FOR BID

The Saint Louis Zoo is seeking competitive proposals from qualified bidders as outlined on the Invitation to bidders, this Request for Proposal, and the Scope of Work contained in these bid documents.

I. THE BIDDING PROCESS

A. Pre-Bid Meeting

1. A mandatory pre-bid meeting will be held at **11:00 AM CST on December 2, 2021** via Zoom meeting. To access: Register in advance for this meeting:

<https://stlzoo.zoom.us/meeting/register/tZEkc-2sqjMpGNKghJFznNw4afQ5tPXxOEMf>

After registering, you will receive a confirmation email containing information about joining the meeting.

2. **Bids will be accepted only from Contractors who have been in business for five (5) years or more and have attended the Pre-Bid Meeting.**
3. Bidders are directed to review carefully all details in executing a Contract, to carefully read the specifications, to examine the drawings included in these bid documents, and to inform themselves fully of the conditions under which the contract is to be performed. The Contractor will not be allowed additional compensation for items on which he has failed to inform himself prior to the bidding.
4. The submission of a bid will be construed by the Saint Louis Zoo to mean that the Bidder has made such examinations and investigations, and agrees to fulfill all the requirements of the contract in full accordance with these specifications, and that he/she is entirely familiar with and thoroughly understands all such requirements.

B. Bid Form and Submittal of Proposal

1. **NOTE: Failure to include a completed MBE/WBE participation form will result in participation recorded as NONRESPONSIVE/ DISQUALIFIED at bid opening.**
2. Quotations on bid form provided should be submitted in PDF format. Altered or erased prices will not be accepted.
3. Proposals will be accepted on or before **2:00 PM CST on December 15, 2021**. Only electronic submissions will be accepted. Please submit the Proposal as a single pdf to the following link: <https://stlzoopoc.egnyte.com/ul/L1MMY1Tljv>

To ensure ease of submission, consider uploading well ahead of the deadline time. Late submissions will not be accepted.

4. Any submitted proposal shall remain valid and subject to acceptance for ninety (90) days after the proposal due date.
5. No bid received after the specified time will be considered.
6. Any bid may be withdrawn prior to the specified time for opening bids or any authorized postponement thereof.
7. Bids having an acceptance time limit of less than 30 days may be rejected.
8. Mailed, faxed, emailed and phone in bids will **not** be accepted.
9. Sunshine Law. "Bidder" acknowledges that Zoo has represented to Bidder that Zoo may be subject to the provisions of Missouri's Sunshine Laws (Mo. Rev. Stat. Sects. 610.010-.225) (the "Sunshine Law"), which statute creates a presumptive rule of public availability of all records held by public governmental bodies, such as the Zoo, unless an exemption from disclosure is available under the Sunshine Law (this includes all Bidding Materials that are not exempt from disclosure under the Sunshine Law).

C. Bid Proposal components and Attachments

1. Cost(s)

- a. Performance and payment bonds are not required.
- b. The laws of the state of Missouri provide that the Saint Louis Zoo pay not state sales or use tax, or federal excise taxes, and these taxes should be excluded from your bid price. Documentation will be provided for Contractor's use in making tax-exempt purchases for this project. (Refer to Appendix B).

D. Minority Participation List

1. Bidder shall execute and include with Bid Proposal the Minority & Woman Owned Participation on Saint Louis Zoo Contract attachment to Bid Form (Appendix C).

E. Bid Bond – Not Required.

F. Responsibilities of the Bidder for Accuracy of Bid Proposal

1. Bidders may not use omissions or errors in the bid documents or other contract documents to their advantage. The Owner reserves the right to issue new instructions correcting any such errors or omissions, which new instructions shall be treated as if originally included.
2. The bid documents contain the available information about the work and the conditions pertaining thereto. Information obtained from any officer, agent, or employee of the Saint Louis Zoo, or from any other person, will not relieve the Contractor's responsibility to assume all risks and obligations pertaining to the work, and to fulfill the conditions of the contract. Bidders are required to satisfy themselves as to the accuracy of the estimated quantities in the bid documents,

and must thoroughly examine the site and review the bid documents, including addenda, if any, before submitting a Bid.

3. No Bidder may assert after bids have been opened that there was a misunderstanding concerning the bid documents, the conditions under which the work must be performed, or the quantities of work involved.
- G. Direct questions about this Request for Bid to: **Candace Bingham**.

II. SELECTION OF SUCCESSFUL BIDDER AND CONTRACT AWARD

- A. The Saint Louis Zoo enjoys the support of the community through the Metropolitan Zoological Park & Museum District. For this reason, the Zoo makes every effort to return that support by contracting with qualified businesses within the District (comprised of St. Louis and St. Louis County) whenever possible.
- B. The time specified for awarding a Contract and for commencing work may be extended or shortened by mutual agreement between the Zoo and the successful Bidder.
- C. The Zoo reserves the right to waive any informalities or minor defects in the Bid or bidding procedures; to reject any or all Bids; to rebid the project at a later date if Bids are rejected; and to accept the Bid that, in the judgment of the Zoo, will serve the best interests of the Zoo, whether or not said Bid is the low Bid.
- D. Before awarding any Contract, the Saint Louis Zoo reserves the right to require the successful Bidder to file proof of his ability to properly finance, manage, staff and execute the project. The Zoo reserves the right to reject any bid if the evidence submitted by, or other investigation of, the Bidder fails to satisfy the Zoo that the Bidder has the proper qualifications, experience, equipment, manpower, or financial and managerial capability to carry out the obligations of the agreement or to perform the work contemplated.
- E. Before award of Contract Successful Bidder is required to furnish:
 1. Cost breakdown and unit prices
 2. Proposed schedule
 3. Information regarding material Subcontractors upon request
 4. Bonds and insurance certificates

SAINT LOUIS ZOO STIPULATED SUM BID FORM

Exhibit and Interpretive Concept Facilitation Services for the “New Experience for Children and Families” II RFP 2021

Date: _____

Proposal of _____

Hereinafter called “Bidder,” [] a corporation organized and existing under the laws of the state of [] a partnership, or [] an individual doing business as

TO: Candace Bingham
Director of Procurement
Saint Louis Zoo
One Government Drive
St. Louis, MO 63110

The Bidder, in compliance with the Invitation to Bid for the project, and having carefully examined the bid documents, dated which documents are made a part hereof, as well as the site and all conditions surrounding and affecting the work, agrees to furnish all labor, materials, and supplies necessary to perform all the work in accordance with said documents and within the time and at the prices stated below.

Furnish all labor, tools, and equipment required to perform all work as defined in the bid documents for the sum of

_____ Dollars (\$) _____).

I. BID DOCUMENTS

Bidder acknowledges review of the following documents:

A. Specifications

B. Addendums

- a Addendum No. _____ Date _____
- b Addendum No. _____ Date _____
- c Addendum No. _____ Date _____

II. MISCELLANEOUS BID REQUIREMENTS

- A. The undersigned understands that this bid shall be good and may not be withdrawn for a period of sixty (60) calendar days after the scheduled closing time and date for receiving bids.
- B. The undersigned understands that the Owner reserves the right to reject any or all bids or Subcontractors.
- C. The undersigned further agrees to indemnify and hold harmless the Owner and Engineer from and against all losses, judgments of every nature and description made, brought, or recovered against the Owner by reason of any act or omission of the undersigned, his agents, Subcontractors, or employees in the execution of the work or in guarding the same.
- D. The undersigned hereby declares that this Stipulated Sum Bid is based solely upon the materials and equipment described in the bidding documents (including Addenda), and that no substitutions are contemplated.
- E. The Bidder declares that he/she has had an opportunity to examine the site of the work and he/she has examined the bid documents therefor, and that he/she has carefully prepared his/her bid upon the basis thereof and that he/she has carefully examined and checked this bid and the materials, equipment and labor required thereunder, the cost thereof, and his/her figures therefor, and hereby states that the amount or amounts set forth in this bid is/are correct and that no mistake or error has occurred in this bid.
- F. Upon receipt of written notice of the acceptance of this bid, the Bidder will execute a formal contract attached within fifteen (15) calendar days and deliver to the Owner a surety bond or bonds as required by the bid documents.
- G. The Zoo Public Relations must provide written approval for any/all promotional materials in advance of publishing – this includes, but is not limited to: social media posts, web copy and images, etc.

III. BID SECURITY

A bid security bond is not required on this Project.

By signing The Bidder hereby states to perform all work indicated in the Bid Documents and necessary to bring the Project to completion.

IF A CORPORATION

Name of Corporation

Signature of Officer

Incorporated under the laws of the state of

Name and Title of Officer (Print or Type)

Licensed to do business in Missouri?

Address for Communications:

(Check one) [] Yes [] No

(Seal if Bid is by corporation)

IF A PARTNERSHIP

State Name and Address of ALL Partners:

Name of Partnership

Signature of Authorized Partner

IF INDIVIDUAL

Address for Communications:

Name of Firm (if any)

Signature of Individual

Print Name

IF BIDDING AS A JOINT VENTURE *(List all parties)*

EMAIL ADDRESS:

Signature for the Saint Louis Zoo

Saint Louis Zoo

Signature of Officer

Name and Title (Print)

Address for Communications:

1 Government Drive

St. Louis, MO 63110

APPENDIX B

State of Missouri
EXEMPTION FROM MISSOURI SALES AND USE TAX ON PURCHASES

Issued to:

Missouri Tax ID Number: 12623491

ZOOLOGICAL PK SUBDIST OF METRO ZOOLOGICAL PK/MUSEU
FOREST PARK
ST LOUIS MO 63110

Effective Date:
07/11/2002

Your application for sales/use tax exempt status has been approved pursuant to section 144.030.1, RSMo. This letter is issued as documentation of your exempt status.

Purchases by your Agency are not subject to sales or use tax if within the conduct of your Agency's exempt functions and activities. When purchasing with this exemption, furnish all sellers or vendors a copy of this letter. This exemption may not be used by individuals making personal purchases.

A contractor may purchase and pay for construction materials from sales tax when fulfilling a contract with your Agency, if your Agency issues a project exemption certificate and the contractor makes purchases in compliance with the provisions of section 144.062, RSMo.

Sales by your Agency are subject to all applicable state and local sales taxes. If you engage in the business of selling tangible personal property or taxable services at retail, you must obtain a Missouri Retail Sales Tax license and collect and remit sales tax.

This is a continuing exemption subject to legislative changes and review by the Director of Revenue. If your Agency ceases to qualify as an exempt entity, this exemption will cease to be valid. This exemption is not assignable or transferable. It is an exemption from sales and use taxes only and is not an exemption from real or personal property tax.

Issued to Missouri Tax ID Number 12623491

Any alteration to this exemption letter renders it invalid.

If you have any questions regarding the use of this letter, please contact the Division of Taxation and Collection, P.O. Box 3300, Jefferson City, MO 65105-3300, phone 573-751-2836.



**POLICY ON
MINORITY & WOMEN
OWNED BUSINESS PARTICIPATION ON
SAINT LOUIS ZOO
CONTRACTS**

Revised: July 15, 2021

**POLICY ON
MINORITY AND WOMEN OWNED BUSINESS
PARTICIPATION ON
SAINT LOUIS ZOO CONTRACTS**

SECTION ONE: POLICY

It is the policy of the Saint Louis Zoo that minority and women-owned businesses, as defined herein, shall have the maximum opportunity to participate in the performance of contracts or sub-contracts of the Zoo. The Zoo shall take all necessary and reasonable steps to ensure that said businesses have the maximum opportunity to compete for and perform under all Zoo contracts. The Zoo or its Contracting Agencies shall not discriminate on the basis of race, color, national origin or sex in the award and performance of contracts.

The method that the Saint Louis Zoo shall employ to implement this policy is the establishment of a goal of at least 25% Minority Business Enterprise participation and at least 5% Women Business Enterprise participation in contracts and purchases wherein Zoo funds are expended. This goal shall be pursued by the programs described below.

SECTION TWO: PROGRAM ADMINISTRATION

1. The Chief Financial Officer for the Saint Louis Zoo shall be charged with the overall responsibility for the administration and enforcement of this Policy on Zoo Minority and Women Owned Business Participation on Saint Louis Zoo Contracts. The Director of Procurement shall be charged with establishing procedures & implementation for the purpose of monitoring the Zoo's overall performance with respect to Minority and Women Business Enterprise participation. The duties and responsibilities of the Director of Procurement shall include:
 - a. Developing and distributing a directory of certified M/WBE businesses.
 - b. Reviewing on a regular basis, the progress of the Zoo toward achieving the goals for the utilization of Minority Business Enterprises and Women Business Enterprises and making an annual report in the first quarter of each year to the Zoo Commission, reporting that progress which has been made, together with recommendations as to such further remedial action that should be taken, if any.
 - c. Monitoring the Zoo throughout the duration of contracts to ensure that all efforts are made to comply with the requirements of this policy.
 - d. Certifying whether or not the requirements of this policy have been satisfied before contracts are signed or countersigned.
 - e. The advertisement for bids, if any, shall appear in the St. Louis Post Dispatch and the St. Louis American no later than 21 days before bids are due on specific contracting opportunities, except where the contracts are awarded on an emergency basis.
 - f. All contract solicitations shall include this M/WBE policy and any other materials required.

2. It shall be the responsibility of each bidder and proposer to adhere to procedures and provisions set forth in this policy:
 - a. Each bidder and proposer **must** complete an M/WBE Utilization with Assurance Form and identify therein its commitment, if any, to utilize MBE's and WBE's. **Any failure to complete and sign the M/WBE Utilization Form will result in the bid or proposal being declared nonresponsive and disqualified.** In the response to an invitation to bid or request for proposal, the bidder or proposer shall include the names of Minority and Women Business Enterprises to whom it intends to award subcontracts, if any, the dollar value of the subcontracts and the scope of work to be performed.
 - b. It is the bidder's or proposer's responsibilities to ensure all M/WBEs projected for use have been certified by recognized agencies, including local and national minority supplier development councils, women owned business development centers, Local, State, and Federal government agencies, or nationally recognized chamber of commerce prior to bid opening. The Zoo will not accept self-certification or certification in process.
 - c. Whenever additional contract supplements, extra work orders or change orders are made that individually, or in aggregate, increase the total dollar value of the original contract, the contractor shall make every effort to maintain the level of M/WBE participation as established in the original contracts.
 - d. The awardees of a contract must, for the duration of their contract, submit a copy of executed agreements with the M/WBEs being utilized. Awardees will be required to submit M/WBE workforce participation at the end of each calendar fiscal month as well as annually at calendar fiscal year's end.
 - e. The prime contract bidder must declare their workforce demographics upfront at time of the time of bid. Workforce, as defined by the Zoo, is the entire labor pool for a single company including professional and labor staff.
 - f. The prime contract bidder should break its subcontracts down into discrete items or packages that at least some of the M/WBEs in the relevant area may find economically feasible to perform.
 - g. The prime contract bidder should not deny a subcontract to an otherwise qualified and competitive M/WBEs solely because the latter cannot perform an entire package of related items, but the bidder may deny a request to repackage the work where doing so would jeopardize scheduling or increase that bidder's cost of performing the original package by more than 5%.
 - h. The Zoo shall use at least part of any pre-bid meeting to encourage prime contractors and M/WBEs to work together, providing an opportunity for all firms to identify themselves and for all M/WBEs to identify the type(s) of work that they perform. The Zoo should also emphasize that it expects all firms to perform a commercially useful function.
 - i. The Zoo shall prepare monthly reports concerning its progress in achieving the goals established in this policy.
 - j. Change orders whether made individually or in the aggregate, which alter the total dollar value of the original contract must maintain the level of M/WBE participation as established in the original contract. If the Contractor is unable to meet its M/WBE contractual commitment, it must submit documentation of reasons for failure to meet the goals.

3. Bonding and Insurance

The prime contract bidder should be encouraged not to deny a subcontract to an otherwise qualified and competitive, and if necessary, certified M/WBE solely because the latter cannot provide a performance or payment bond for the work, unless the bidder's bonding is contingent upon bonding for all subcontractors.

4. Written Policy

Independent and apart from its interest in any one project, the prime contract bidder should have a written policy stating that it affirmatively supports subcontracting to M/WBEs and that bringing such firms into the mainstream of the involved industry is a priority for that firm. This policy shall be made available to the Zoo upon request.

5. Liaison with M/WBEs

Independent and apart from its interest in any one project, the prime contract bidder should assign a senior official the responsibility of serving as a liaison between the firm and the M/WBEs in the relevant area.

6. Scope Letter

At least five business days before the date on which bids are due, the M/WBEs should also give the prime contract bidder a scope of work letter that defines the items that the M/WBE would like to perform.

SECTION THREE: ZOO CONSTRUCTION AND IMPROVEMENT CONTRACTS

This section shall be applicable to all contracts let for Zoo construction or improvements.

MBE and WBE participation shall be counted in accordance with the following provisions:

1. The Zoo may count MBE or WBE participation only expenditures to MBEs and WBEs that perform commercially useful functions in the execution of a contract. An MBE or WBE is considered to perform a commercially useful function when it is responsible for executing a distinct element of the work and carrying out its responsibilities by actually performing, managing and supervising the work involved. To determine whether a MBE or WBE is performing a commercially useful function, the Zoo will evaluate the amount of work subcontracted, industry practices and other relevant factors.
2. The Zoo may count as a MBE or WBE participation the total dollar value of a contract with a MBE or WBE prime contractor less any amount that is subcontracted to non- MBEs/WBEs (including any persons or firms that are identified as MBE and/or WBE but are not so certified by a certifying authority).
3. The total dollar value of a contract with an enterprise that is owned and controlled by a minority woman will be counted as minority participation.
4. The Zoo may count as MBE or WBE participation a portion of the total dollar value of a contract with a joint venture equal to the percentage of MBE or WBE participation in the joint venture. The joint venture must be certified by a Certifying Authority (as defined below) and the MBE and WBE participation in the joint venture must be responsible for a clearly defined portion of the work to be performed, equal to a share in the ownership, control, management, responsibility, risks and profits

of the joint venture.

5. The Zoo may count toward a bidder's MBE and WBE goals expenditures for material and supplies obtained from M/WBE suppliers and manufacturers, provided that the M/WBE assumes the actual and contractual responsibility for the provision of materials and supplies.
 - a. The Zoo may count a bidder's entire expenditure to a M/WBE manufacturer. Manufacturer is defined as an individual or entity that produces goods from raw materials or substantially alters them before resale.
6. The Zoo may count as MBE and WBE participation the entire expenditure to certified MBE or WBE supplier, when the supplier:
 - a. Assumes the actual and contractual responsibility for furnishing the supplies and materials; and
 - b. Is recognized as a distributor by the industry involved in the contracted supplies and materials; and
 - c. Owns or leases a warehouse, yard, building or whatever other facilities are viewed as customary or necessary by the industry; and
 - d. Distributes, delivers and services products with their own staff and/or equipment.
7. The Zoo may count as MBE and WBE participation only those firms that have been certified as MBE's and WBE's by local and national minority supplier development councils, women owned business development centers, Local, State, and Federal government agencies, or nationally recognized chamber of commerce ("Certifying Authority") prior to bid opening. If a firm listed by a bidder in its bid documents has not been so certified as MBE or WBE, the amount of participation it represents will be deducted from the total MBE or WBE participation proposed by the bidder.
8. Joint ventures or mentor-protégé relationships between prime contractors and subcontractors with local MBE and WBE firms are encouraged.
9. Representatives of the Zoo or its designee shall make periodic visits to the project site to verify minority and women's business enterprise participation and staffing.
10. Contracts totaling \$3 million and above include a 3 month paid training program for a minority or woman individual.

SECTION FOUR: SERVICE CONTRACTS

1. It shall be the goal of each Contracting Agency where anticipated service contracts, including professional service contracts, for any year exceed the sum of \$25,000 in the aggregate that 25% of the aggregate value of contracts awarded each fiscal year be let with MBEs and that 5% of the aggregate value of contracts awarded each fiscal year be let with WBEs.
2. All requests for services, including professional services, shall require proposers to make every good faith effort to utilize M/WBE firms as subcontractors and suppliers whenever possible.
3. Joint ventures or mentor-protégé relationships between prime contractors and subcontractors with local M/WBE firms are encouraged.
4. Participation of M/WBE firms located within the Zoo Museum District is preferred (City of St. Louis and St. Louis County, Missouri).

SECTION FIVE: SUPPLY CONTRACTS

1. The goal of the Zoo is that 25% of the value of all contracts let and purchases made by the Zoo shall be let or made with MBEs and that 5% of the value of all contracts let and purchases made by the Zoo

shall be made with WBEs.

2. All contracts let by the Zoo for the purchase or lease of materials, equipment, supplies, commodities or services, the estimated cost of which exceeds \$10,000, shall be subject to this goal.
3. Joint ventures or mentor-protégé relationships between prime contractors/distributors, subcontractors, and materials suppliers with local M/WBE firms are encouraged.
4. Participation of M/WBE firms located within the Zoo Museum District (ZMD) is preferred.

SECTION SIX: ARCHITECTURE, ENGINEERING, & SURVEYOR CONTRACTS

1. It shall be the goal of each Contracting Agency where anticipated Architecture, Engineering & Surveyor contracts for any year exceed the sum of \$25,000 in the aggregate that 25% of the aggregate value of contracts awarded each fiscal year be let with MBEs and that 5% of the aggregate value of contracts awarded each fiscal year be let with WBEs.
2. All requests for such services, including professional services, shall require proposers to make every good faith effort to utilize minority business enterprises and women’s business enterprises as subcontractors and suppliers whenever possible.
3. Joint ventures or mentor-protégé relationships between prime contractors and subcontractors with local M/WBE firms are encouraged.
4. Participation of M/WBE firms located within the Zoo Museum District is preferred (City of St. Louis and St. Louis County, Missouri).

SECTION SEVEN: QUALIFICATION BASED SELECTION CONTRACTS

1. The submitter is to submit a supplemental form containing actual M/WBE information as project scope is known with work order.
2. It is a requirement that the Zoo subsequently consents to such supplemental M/WBE information before moving forward with the proposed contract.

At contract completion, the Zoo shall obtain final documentation of M/WBE participation. The Zoo must have complete and acceptable documentation as determined by the Zoo of amounts paid to all project M/ WBE subcontractors on file before the final payment is made to the prime contractor/ organization.

Dated: _____

Saint Louis Zoo: _____

Title: _____

Contractor/ Representative: _____

Organization: _____

SAINT LOUIS ZOO
MBE/WBE UTILIZATION STATEMENT

Policy: It is the policy of the Saint Louis Zoo, that minority and women-owned businesses, as defined in the foregoing document, shall have the maximum opportunity to participate in the performance of contracts or sub-contracts of the Zoo. The Zoo shall take all necessary and reasonable steps to ensure that said businesses have the maximum opportunity to compete for and perform under all Zoo contracts. The Zoo shall not discriminate on the basis of race, color, national origin or sex in the award and performance of contracts.

Obligation: The contractor/ organization agrees to ensure that minority and/or women-owned businesses have the maximum opportunity to participate in the performance of contracts or subcontracts financed in whole or in part with Zoo funds. The contractor/ organization shall take all necessary and reasonable steps to ensure that said businesses have the maximum opportunity to compete for and perform under this contract. The contractor/ organization shall not discriminate on the basis of race, color, national origin or sex in the award and performance of contracts.

Project and Bid Identification

Complete the following information concerning the Project and Bid:

Project Name: _____

Total Bid: \$ _____

Contract M/WBE Goal: 25% MBE and 5% WBE Participation

Dollar amount of proposed MBE: \$ _____

Dollar amount of proposed WBE: \$ _____

Workforce Demographic Declaration

Define your employee demographics for minority & women. Workforce, as defined by the Zoo, is the entire labor pool for a single company including professional and labor staff.

Minority _____ %

Women _____ %

ASSURANCE

I, acting in my capacity as an officer of the undersigned bidder or bidders if a joint venture, hereby assure the Saint Louis Zoo that on this project my company will: (check one)

_____ Meet or exceed contract award goals and will provide participation as follows:

Minority- Owned Business Commitment _____ Percent

Women-Owned Business Commitment _____ Percent

_____ Does not meet contract award goals but will demonstrate that good faith efforts were made to meet the goals and that my company will provide participation as follows:

Minority- Owned Business Commitment _____ Percent

Women-Owned Business Commitment _____ Percent

Certification Status (if declared, certification must be attached)

_____ MBE _____ WBE _____ Other _____ Not Applicable

Name of Company

By

Title

Date

THE WILLFUL FALSIFICATION OF ANY OF THE ABOVE STATEMENTS MAY SUBJECT THE CONTRACTOR/ SUBCONTRACTOR/ ORGANIZATION TO CIVIL OR CRIMINAL PROSECUTION.

DEFINITIONS

For purposes of this policy, the following terms have the meanings indicated below:

Certification: The process by which the Saint Louis Zoo determines a person, firm or legal entity to be a bona fide MBE or WBE through a certifying agency. Recognized agencies, include local and national minority supplier development councils, women owned business development centers, Local, State, and Federal government agencies, or nationally recognized chamber of commerce.

Contracting Agency: Any Agency or Department making a contract on behalf of the Saint Louis Zoo.

Good Faith Effort: all actions taken by a bidder or prime contractor consistent with the requirements, rules and procedures established by the Saint Louis Zoo to engage M/WBEs toward meeting the goals for minority and women business enterprise utilization.

Disadvantaged Minority Business Enterprise (DBE): a sole proprietorship, partnership or corporation owned, operated and controlled by disadvantaged group members who have at least 51% ownership. The disadvantaged group member(s) must have day-to-day operational and managerial control and an interest in capital and earnings commensurate with his or her percentage of ownership.

M/WBE: Minority and Women Own Business Enterprise

M/WBE Utilization Plan: the form detailing the goods and services to be provided by the prime contractor by each M/WBE list to meet the M/WBE goals. This form must be submitted at bid opening by each bidder and included the names(s) of all the M/WBE subcontractors to be utilized in the contract, certification information, and the items of work to be performed and their percentage of the bid amount.

Minority Business Enterprise (MBE): a sole proprietorship, partnership or corporation owned, operated and controlled by minority group members who have at least 51% ownership. The minority group member(s) must have day-to-day operational and managerial control and an interest in capital and earnings commensurate with his or her percentage of ownership.

Minority Group Member(s): persons legally residing in the United States who are African American, Asian-American, Native-American or Hispanic-American.

Women's Business Enterprise (WBE): a sole proprietorship, partnership or corporation owned, operated and controlled by a women or women who have at least 51% ownership. The women or women must have day to day operational and managerial control and an interest in capital and earnings commensurate with her or their percentage of ownership.

Workforce: the entire labor pool for a single company including professional and labor staff.

Workforce Participation: a form submitted by the contractor or agency on a monthly & year-end basis declaring workforce participation based on pay application/ invoice statements.