



# Board of County Commissioners Request for Quotation

\* THIS IS NOT AN ORDER \*

Date: 08/21/2015

Page: 1 of 8

**RFQ #2015000422**

Charlotte County Purchasing Division  
18500 Murdock Circle, Room 344  
Port Charlotte, Florida 33948-1094

Contact Person: Carole A. Smith, CPPB,  
Senior Contract Specialist  
Contact Phone: 941.743.1373  
Contact Email: [carole.smith@charlottecountyfl.gov](mailto:carole.smith@charlottecountyfl.gov)

FAX: 941.743.1384

Reply No Later Than: September 16, 2015 (3:00 p.m. EST)

## Specifications

### SOCIAL MEDIA SERVICES

**PURPOSE:** This is an annual contract for a social media agency or social media professional to design and execute a comprehensive social media campaign that will drive awareness, engagement, channel growth, and deliver a measurable return on investment. The social media campaign will integrate with Charlotte Harbor & the Gulf Islands (CHGI) Visitor and Convention Bureau's (VCB) tourism advertising and public relations campaigns to assure consistent and cohesive messaging.

**QUOTE PRICES/TERM OF CONTRACT:** Completion time shall be expressed by the established service time. The price quoted shall include Contractor's cost in full for all transportation, labor, materials and equipment used in performing the services herein.

The term of the Contract will be from date of award up to and including December 31, 2016 with option to renew two (2) additional one-year terms at the same prices, terms, and conditions, by mutual consent.

**PRE-QUOTE CONFERENCE:** A pre-quote conference will be held on August 31, 2015, 11:00 a.m. (EST) to answer questions and discuss the requirements of the County, in the Charlotte County Administration Center, Building B, Room 106B, 18500 Murdock Circle, Suite 344, Port Charlotte, Florida. Attendance of this meeting is not mandatory; however, interested quoters are encouraged to attend.

**NOTICE TO PROCEED:** Notice to Proceed, or Purchase Order, shall be issued bearing the agreed-upon commencement date. No work under the Contract shall begin until after the Notice to Proceed/Purchase Order has been issued.

**RESERVED RIGHTS:** The County reserves the right to accept or reject any and/or all quotes, to waive irregularities and technicalities, and to request resubmission of quotes. Also, the County reserves the right to accept all or any part of the quote and to increase or decrease quantities to meet additional or reduced requirements of the County. Any sole response received by the first submission date may be rejected by the County depending on available competition and timely needs of the County.

**CANCELLATION:** The County shall have the right to unilaterally cancel, terminate or suspend this Contract, in whole or in part, by providing the Contractor thirty (30) days written notice by certified mail.

**FORM OF CONTRACT:** The submitted Quote Form signed by the Quoter, together with the complete quote package furnished by the County, shall constitute a binding contract. The Quoter shall be required to perform according to the Quoter's submitted Quote Form and the County's quote package.

For the purpose of quote evaluation, the County will proceed on the assumption that the quoter intends his quote be evaluated on the basis of the unit prices, extensions, and totals arrived at by resolution of arithmetic discrepancies as provided above, and the quote will be so reflected on the tabulation of quotes.

**EQUAL EMPLOYMENT OPPORTUNITY:** Charlotte County, Florida, in accordance with the provisions of Title VI of The Civil Rights Act of 1964 (78 Stat. 252) and the Regulations of the Department of Commerce (15 CFR, Part 8) issued pursuant to such Act, hereby notifies all quoters that it will affirmatively ensure that in any contract entered into pursuant to this advertisement, minority business enterprises will be afforded full opportunity to submit quotes in response to this advertisement and will not be discriminated against on the grounds of race, color or national origin in consideration for an award.

All firms are hereby notified that the successful Contractor must and shall comply with the Civil Rights Act of 1964, the Age Discrimination in Employment Act, the Rehabilitation Act of 1973, the Americans with Disabilities Act and the Florida Civil Rights Act, all as amended. Specifically, Contractor agrees that:

- No person shall, on the grounds of race, color, sex, religion, age, disability, national origin or marital status, be excluded from participation in, be denied the benefits of, or be otherwise subjected to discrimination under any program, activity or service funded through this Contract.
- Contractor will not discriminate against any employee or applicant for employment because of race, color, religion, sex, age, disability, national origin or marital status. Contractor agrees to post in a conspicuous place, available to employees and applicants for employment, notices setting forth the provisions of this non-discrimination clause.
- Contractor will, in all solicitations or advertisements regarding program activities, services provided or applications for employment, state that all qualified applicants will receive consideration for services or employment without regard to race, color, religion, sex, age, disability, national origin or marital status.
- County may require Contractor to submit reports as may be necessary to indicate non-discrimination. County officials will be permitted access to Contractor's books, records, accounts and other sources of information and its facilities as may be pertinent to ascertain compliance with non-discrimination laws.

It is expressly understood that County shall have the right to terminate this Contract upon receipt of evidence of discrimination.

#### **SCOPE OF SERVICES:**

**A. Background:** This is for an annual contract for a social media agency or social media professional to design and execute a comprehensive social media campaign that will drive awareness, engagement, and channel growth and deliver a measurable return on investment.

The social media campaign will integrate with Charlotte Harbor & the Gulf Islands (CHGI) Visitor and Convention Bureau's (VCB) tourism advertising and public relations campaigns to assure consistent and cohesive messaging.

The VCB promotes CHGI as an eco-tourism leisure vacation destination. The County seeks to contract with a Social Media Agency to become a proactive partner with the VCB in working to increase awareness of Charlotte County within the U.S. and international travel marketplace, and continue to brand the area as a premier, year-round eco-tourism travel destination. See [www.CharlotteHarborTravel.com](http://www.CharlotteHarborTravel.com).

Additionally, the County has a state-of-the-art 45,000 square-foot meeting and event center. The Charlotte Harbor Event & Conference Center enables the VCB to market the venue as a small to mid-size meetings destination. Collateral materials and a website [www.CharlotteHarborMeetings.com](http://www.CharlotteHarborMeetings.com) were developed as part of this marketing effort. The County also promotes the area as a top sporting destination with its many outdoor event venues and the state-of-the-art stadium, and spring training home to the Tampa Bay Rays Baseball Team.

Social media efforts should primarily target consumers, and increase awareness of the destination product. The objective should also be to target areas of opportunity which will increase leisure tourism activity during the spring, summer and fall shoulder seasons; as well as developing the meetings and sports markets. The goal of the VCB is create a consistent message and identity for Charlotte Harbor and the Gulf Islands, which will engender visitor interest and drive visitation, increasing tourism tax collections and building brand equity.

#### **B. Goals**

- Build brand recognition and equity around ecotourism.
- Strengthen place name recognition for Englewood & the Beaches and Punta Gorda.
- Develop tourism as a year-round industry.
- Increase business in summer and during spring and fall shoulder seasons.
- Increase visitation and overall spending by tourists.
- Increase positive impact of tourism to all communities and tourism sectors.
- Develop small to mid-size meetings market.

- Develop business from international markets, specifically: Germany, United Kingdom (UK), Canada and Brazil
- Engender community support for preservation and protection of Charlotte County's ecosystems.
- Provide a central source of information about tourism-related resources and events.
- Leverage VCB resources through local, regional & state marketing partnerships.
- Galvanize tourism industry through improved communication.

### **C. Target Market Segments**

- Age: 27 – 65
- Household Income: \$75,000 +
- Couples & family orientation
- Fishing, boating and other water-based recreation
- Outdoor, nature-based soft adventure
- Florida leisure travelers & I-75 corridor drive market
- Europeans seeking outdoor, value-added vacations
- Sports Tourism
- Meeting & conferences
- Business travel
- Group travel
- Media
- Film/Video/Media production

### **D. Target Markets – International**

Brazil	Canada
Mexico	UK
Argentina	Germany

### **Target Markets – Domestic**

Northeast	Florida
Southeast	Midwest

### **E. Agency Strategy and Services**

- Provide a general overview of how you approach the development of a social media campaign.
- Tell us what you believe is necessary for a successful integration of social media with traditional advertising and public relations.
- What metrics do you use to gauge the success of a client's social media campaign?
- What tools or methodologies do you use for reputation monitoring? Please include sample reports.
- What is your process for monitoring a client's social channels?
- How do you determine whether or not to respond to a post?
- How do you handle inappropriate or negative posts?
- What do you include in your monthly reports to clients? Please include a sample.
- Provide two (2) campaign concepts for CHGI that allow us to understand your concept development process and creative abilities.
- What experience do you have reaching/influencing international markets (specifically, Germany, Great Britain, Mexico and Brazil) through social media channels?
- What is your process for identifying and working with social media influencers?
- What platforms and software do you use for social media management?
- Have you ever had to put a plan together for crisis communication using social media as the platform? If so, what were the results? Challenges?

### **F. Scope – The scope consists of working closely with advertising and public relations agencies of record, develop and implement a strategy to integrate the VCB's brand message across social media platforms. This shall include:**

- Developing targeted, boosted (funds for boosted posts to come from VCB promotional budget) posts in tandem with placed media and/or PR campaigns.
- Developing short duration, topic-focused Twitter and Facebook campaigns in tandem with placed media and/or PR campaigns.
- Developing posts specifically targeting international markets.
- Suggesting ways to use social media apps or management tools such as, but not limited to, Vine, Instagram, Meerkat, Periscope, Pinterest, Hootsuite, Scoop.it, and Tweetbot to better distribute and amplify the CHGI message.
- Working closely with agencies of record, develop a social media strategy to promote awareness of, and engagement with, CHGI's "Ecoginomical" campaign.

- Assist the VCB's public relations agency of record during a crisis to assure coordinated communication with partners, the local community, visitors and media.

**CRITERIA FOR AWARD:** With a perfect score of 100, award will be assessed according to the following criteria:

<b>Evaluation</b>	<b>Maximum Points</b>
A. Experience w/Tourism-Related Social Media	25
B. Creativity	15
C. Experience w/Social Media & International Markets	15
D. Experience w/Social Media Influencers	15
E. Integration of Social Media w/Traditional Advertising & PR	20
F. Local Preference	10

The County reserves the right to reject the quote of any firm who has previously failed to perform properly, or on time, contracts of similar nature; or who is not in a position to satisfactorily perform the contract. If, after the due date and time, the lowest firm is deemed non-responsible by the County, such firm shall receive written notice from the County of this determination. The firm shall have five (5) business days from the date of this notice to dispute the determination and to provide to the County any additional information it deems relevant regarding the firm's responsibility. The County shall make a final determination regarding the firm's responsibility at the time of award of the contract.

**TAXES:** Charlotte County is exempt from Federal Excise and State Sales Taxes. The Contractor shall assume liability for Local, State, or Federal Tax that is applicable to the work.

**ASSIGNMENT:** This agreement, or any interest herein, shall not be assigned, transferred or otherwise encumbered, under any circumstances by Contractor without the prior written consent of the County.

It shall be the responsibility of the Contractor to assure compliance with any FDOT specifications, OSHA, EPA, and/or other Federal, State or County law(s), code(s) and ordinance(s), as each may apply.

**SAFETY AND HEALTH REQUIREMENTS:** Charlotte County Safety and Health Requirements specifically outline the purpose, authorization, rules, and techniques to be utilized by all Contractors performing work for Charlotte County. All Contractors should become familiar with the contents of this program to ensure compliance with its procedures. The Contractor shall submit a Contractor Health and Safety plan to the County prior to commencement of work. (See attached requirements)

**PAYMENT:** All invoices will be paid in accordance with the Local Government Prompt Payment Act (F.S. 218.74).

**INSURANCE REQUIREMENTS:** Contractor shall provide coverage with limits of liability not less than those stated below. An excess liability policy or umbrella liability policy may be used to meet the minimum liability requirements provided that the coverage is written on a "following form" basis.

**Commercial General Liability – Occurrence Form (CG 00 01) -** Policy shall include bodily injury, personal injury, property damage and broad form contractual liability.

**Minimum Requirements:**

- |                     |           |
|---------------------|-----------|
| • General Aggregate | \$500,000 |
| • Each Occurrence   | \$500,000 |

1. The policy shall be endorsed to include the following additional insured language: "Charlotte County a political subdivision of the state of Florida and it officers, employees, agents and volunteers" shall be named as an additional insured with respect to liability arising out of the activities performed by, or on behalf of the Contractor.
2. Contractor's subcontractors shall be subject to the same minimum requirements identified above.
3. Policy shall be endorsed for a waiver of subrogation against the Charlotte County.

**Additional Insured –** All policies, except for the Workers Compensation shall contain endorsements naming the County its officers, employees, agents and volunteers as additional insured with respect to liabilities arising out of the performance of services contained herein. The additional insured endorsements' shall not limit the scope of coverage for the County to vicarious liability but shall allow coverage for the County to full extent provided by the policy, even if those limits exceed those

required by this contract. Such additional insured coverage shall be at least as broad as Additional Insured (Form B) endorsement form ISO, CG 20 10 11 85 or both CG 20 10 and CG 23 37 if later revisions used.

**Waiver of Subrogation Rights** – The Contractor shall require the carriers of required coverage's to waive all rights of subrogation against the County, its officers, employees, agents and volunteers. Contractor agrees to obtain any endorsement that may be necessary to affect this waiver of subrogation. All general or auto liability insurance coverage provided shall not prohibit the Contractor and Contractor's employees or agents from waiving the right of subrogation prior to a loss or claim. The Contractor hereby waives all rights of subrogation against the County.

**Policies Primary and Non-Contributory** – For any claims related to this contract, the Contractor's insurance coverage shall be primary insurance as respects the County, its officers, employees, agents and volunteers. Any insurance or self-insurance maintained by the County, its officers, employees, agents or volunteers shall be excess of the Contractor's insurance and shall not contribute with it.

**Severability of Interests** – The Contractor agrees to ensure that coverage provided to meet these requirements is applicable separately to each insured and there will be no cross liability exclusions that preclude coverage for suits between the Contractor and the County or between the County and any other insured or additional insured under the policy.

**Proof of Coverage** - Prior to the commencement of performance of services the Contractor shall furnish to the County Purchasing Division Certificates of Insurance and amendatory endorsements or copies of the applicable policy language effecting coverage required. These certificates shall provide that such insurance shall not be terminated or expire without notice thereof in accordance with the policy provisions and Contractor shall maintain such insurance from the time the Contractor commences performance of services until completion of such services. Within seven (7) calendar days of notice of award, the Contractor shall furnish a copy of the Declaration page and required endorsements for all applicable policies and will provide complete certified copies of the policies and endorsements immediately upon request.

**Acceptability of insurance carrier** – Unless otherwise approved by Risk Management, Insurance shall be written by insurers authorized to do business in the State of Florida and with a minimum Best Insurance Guide rating of "A:VII".

**Deductibles and Self-Insured Retention** – Any and all deductibles or self-insured retentions in excess of \$10,000 shall be declared to and approved by Risk Management. The County may require the Contractor to purchase coverage with a lower deductible or retention or provide proof of ability to pay losses and related investigations, claim administration and defense expenses within the deductible or retention.

**Failure to Procure Coverage** – In the event that any policy of insurance required under this contract does not comply with the requirements, is not procured or is cancelled and not replaced, the County has the right but not the obligation or duty to terminate the contract or obtain insurance if it deems necessary and any premiums paid by the County will be promptly reimbursed by the Contractor or County payments to the Contractor will be reduced to pay for County purchased insurance.

**Insurance Review** – Insurance requirements are subject to periodic review by the County. The Risk Manager or designee is authorized, but not required, to reduce, waive, or suspend any insurance requirements whenever Risk Management determines that any of the required insurance is not available, is unreasonably priced or is not needed to protect the interests of the County. In addition, if Risk Management determines that heretofore, unreasonably or unavailable types of insurance coverage or coverage limits become reasonably priced or available, the Risk Manager or designee is authorized, but not required, to change the above insurance requirements to require additional types of insurance coverage or higher coverage limits, provided that any such change is reasonable in light of past claims against the County, inflation, or any other item reasonably related to the County's risk. Any change requiring additional types of insurance coverage or higher coverage limits must be made by amendment to this contract. Contractor agrees to execute any such amendment within thirty (30) days of receipt. Any failure, actual, or alleged, on part of the County to monitor or enforce compliance with any of the insurance and indemnification requirements will not be deemed as a waiver of any rights on the part to the County.

**UNAUTHORIZED ALIEN WORKERS:** Charlotte County will not intentionally award publicly-funded contracts to any Contractor who knowingly employs unauthorized alien workers, constituting a violation of the employment provisions contained in 8 U.S.C. Section 1324a(e) [Section 274A(e) of the Immigration and Nationality Act ("INA")]. The County shall consider employment by any Contractor of unauthorized aliens a violation of Section 274A(e) of the INA. Such violation by the Contractor of the employment provisions contained in Section 274A(e) of the INA shall be grounds for termination of this Agreement by the County.

**EMPLOYEE BACKGROUND CHECK:** If an owner, except a stockholder in a publicly traded corporation, or an employee of the Contractor has been convicted of any offenses requiring registration as a sexual offender or sexual predator, regardless of the location of conviction, the Contractor shall ensure that the offender's or predator's work on the project is consistent with the terms of his probation and registry requirements.



# **AFFIDAVIT**

## **Claiming Status as a Local Business**

Local office means the company has a valid Business Tax License issued by Charlotte County, Sarasota County, or DeSoto County at least six (6) months prior to the proposal submission to do business within Charlotte County, Sarasota County, or DeSoto County that authorizes the business to provide the services, and a physical business address located within the limits of Charlotte County, Sarasota County, or DeSoto County from which the company operates or performs business. Post Office Boxes are not verifiable and shall not be used for the purpose of establishing said physical address. In addition to the foregoing, a company shall not be considered having a "Local Office" unless it contributes to the economic development and well-being of Charlotte County, Sarasota County, or DeSoto County in a verifiable and measurable way (as identified by the criteria below). Also, companies must demonstrate and document the in-County/in-office capability and availability of the personnel working in the local office and the type of services performed at this location that is pertinent to the type of project. Companies shall affirm in writing their compliance with the foregoing at the time of submitting their proposal to be eligible for consideration as having a "Local Office". A company who misrepresents the local preference status of its company in a proposal to the County will lose the privilege to claim local preference for a one-year period.

If requested by the County, the firm will be required to provide documentation substantiating the information given in this affidavit. Charlotte County reserves the right to request supporting documentation as evidence to substantiate the information given in this affidavit. Failure to do so will result in the firm's submission being deemed non-responsive.

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

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

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

Year Business Established: \_\_\_\_\_

Circle the appropriate County: Charlotte   DeSoto   Sarasota

State of Florida  
County of \_\_\_\_\_

Sworn to and subscribed before me, a Notary Public, for the above State and County on this \_\_\_\_\_ Day of \_\_\_\_\_, 20\_\_\_\_.

\_\_\_\_\_  
Notary Public

\_\_\_\_\_  
Commission Expiration

(Affix Official Seal)

The signee of this Affidavit guarantees, as evidenced by the sworn affidavit required herein, the truth and accuracy of this affidavit to interrogatories hereinafter made.

**This page to be returned only if Contractor is claiming a Local Business Status.**

### SOURCE OF SUPPLY AND SUBCONTRACTORS

The following sources of supply and subcontractors shall be used for **SOCIAL MEDIA SERVICES**. (If firm does not have a source of supply or subcontractor, insert "to be determined". When source or subcontractor is determined, selection will be subject to County approval. If not applicable, please state N/A).

<u>Source of Supply</u>	<u>Subcontractor(s)</u>
1. _____	1. _____
2. _____	2. _____
3. _____	3. _____
4. _____	4. _____
5. _____	5. _____
6. _____	6. _____

### DRUG FREE WORKPLACE FORM

The undersigned vendor in accordance with Florida Statute 287.087 hereby certifies that \_\_\_\_\_  
(name of business) does:

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
2. Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.
3. Give each employee engaged in providing the commodities or contractual services that are under bid a copy of the statement specified in subsection (1).
4. In the statement specified in subsection (1), notify the employees that, as a condition of working on the commodities or contractual services that are under bid, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty or nolo contendere to, any violation of Chapter 893 or of any controlled substance law of the United States or any state, for a violation occurring in the workplace no later than five (5) days after such conviction.
5. Impose a sanction on, or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community, by any employee who is so convicted.
6. Make a good faith effort to continue to maintain a drug-free workplace through implementation of this section.

As the person authorized to sign the statement, I certify that this firm complies fully with the above requirements.

Signature \_\_\_\_\_

Dated \_\_\_\_\_

Quoter's Name: \_\_\_\_\_

(This page to be returned)