



# PROCUREMENT SERVICES

## ADDENDUM TO CONTRACT DOCUMENTS

ADDENDUM NO.: 1

PROJECT NAME: ITN No. N237438JA – Marketing Services

DATE OF ISSUE: February 21, 2023

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The following information shall be included in the ITN documents and is hereby made part of the contract documents in the form of clarification, addition, deletion or revision to the contract specifications.

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### Proposers' questions/issues and District answers (*District answers are italicized*):

- Q1. On the Proposal Response Form, should we submit hourly or project rates? How do we know what project to base our pricing? For consistency, maybe provide the same project for all of us to score?
- A1. *We have revised the Proposal Response Form to reflect clarity of desired pricing as well as changed the item descriptions to two projects in which everyone will submit pricing. See page 2 below.***
- Q2. I wanted to confirm which insurances you need for the marketing services to show you on the certificate. For example, for Automotive insurance, we do not have company vehicles, just personal ones. Since we are not performing work on site, these seem like they are more so for contractors who work in more liability situational jobs at the schools. Could we send the proof of insurances and licenses for the ones we have required for our industry? I ask because we do most work via zoom meetings, digitally, and via computer and then in meetings face to face here and there.
- A2. *Proposers would need to have Hired & Non-Owned Auto Liability which can be include in the General Liability coverage. They also need to provide proof of Professional Liability as they are providing a professional service.***
- Q3. In review of RFP N237438JA - Marketing Services, I noticed a statement related to account management – “They shall demonstrate ten years or more of executive consulting services with government entities.” Is that mandatory or preferred? Would a submitter meeting all the stated requirements but not this criteria be disqualified?
- A3. *This is a desired qualification to be scored accordingly, with no disqualifications.***

**PROPOSAL RESPONSE FORM**  
**THE SCHOOL DISTRICT OF LEE COUNTY, FLORIDA**  
**DEPARTMENT OF PROCUREMENT SERVICES**  
**ITN No. N237438JA**  
**Marketing Services**

DATE SUBMITTED: \_\_\_\_\_

PROPOSER NAME: \_\_\_\_\_

TO: The School District of Lee County Fort Myers, Florida

**Please submit project rates for Sample Work Projects 1 & 2 (Document 1, Proposal, Items g.i. & g.2.) as well as hourly rates for additional support staff. In addition to pricing, provide information required in response to Section 11, Proposal Submittal Requirements.**

Having carefully examined the "General Conditions", and the "Detailed Specifications", all of which are contained herein, the Undersigned proposes to furnish the following which meet the specifications:

ITEM	ITEM DESCRIPTION	PROJECT RATE
1	Sample Work Project 1	\$ _____
2	Sample Work Project 2	\$ _____
	<b>TOTAL FIXED FEE FOR PROJECTS 1 &amp; 2</b>	\$ _____

	Labor Category	Hourly Rate
<b>Hourly Rate for Additional Support</b>	_____	\$ _____
	_____	\$ _____
	_____	\$ _____

<b>I UNDERSTAND AND HAVE THE ABILITY TO ACCEPT CREDIT CARDS FOR PAYMENT AS SPECIFIED ON PAGE 10 – SECTION 44.c. (YES OR NO)</b>	
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Printed Name: \_\_\_\_\_

Signature of authorized Vendor representative: \_\_\_\_\_

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

*In addition to the above questions, the order of the Scoring of Written Proposals and Scoring of Interviews was changed to reflect the highest weighted percentage item first and the lowest weighted percentage item last. The following replaces pages 20-22 of the Specifications.*

## ITN SELECTION CRITERIA

**Evaluation of Proposals – Evaluation Criteria:** Proposals shall be scored using a weighted scale of 0 to 10 (0 - Does Not Meet, 5 - Partially Meets, 8 – Meets, 10 – Exceeds). The scoring criteria is as following:

### SCORING OF WRITTEN PROPOSALS

EVALUATION CRITERIA #1		WEIGHTED PERCENTAGE
1	<p><b><u>SAMPLE WORK PROJECTS</u></b></p> <p><u>Sample Work Project 1:</u> Create and submit advertising samples (i.e. video link, brochure, website design, flyer, social media ad) that will meet the District’s need for hiring many qualified teachers.</p> <ul style="list-style-type: none"> <li>i. Target markets include: recent college graduates, career changers and people outside of the State of Florida.</li> <li>ii. The District is seeking professional, engaging, creative and unique ads that will engage recent college graduates and career changers.</li> <li>iii. The District is seeking a professional themed advertisement, look and feel, excluding beach theme, pencil, crayon, chalkboard, apple, red brick school houses or cartoon illustrations.</li> </ul> <p><u>Sample Work Project 2:</u> Provide an example of a long-form informational document (i.e. annual report, project plan, policies and procedure manual).</p> <ul style="list-style-type: none"> <li>i. Sample must be branded.</li> <li>ii. Sample must include a professional graphic look.</li> <li>iii. Sample must include graphics/icons and photos.</li> <li>iv. Text must be professionally written without grammatical errors.</li> </ul>	25%
EVALUATION CRITERIA #2		
2	<p><b><u>PROJECT APPROACH</u></b></p> <p>Proposer described the approach to be applied to implement the tasks defined in the Scope of Work herein.</p> <ul style="list-style-type: none"> <li>i. Describe how each task will be implemented.</li> <li>ii. Describe tools, techniques, knowledge, skills and abilities to be leveraged.</li> <li>iii. Describe measures of success for each task.</li> </ul>	20%
EVALUATION CRITERIA #3		
3	<p><b><u>RELATED EXPERIENCE</u></b></p> <p>The Proposer described experience providing services similar in size, scope and complexity to those requested in the ITN. Similar size shall be measured as a client with more than 50 locations, to include, but not limited to municipalities such as counties, local governments, etc. Related materials prepared for other clients required to be attached.</p>	10%
EVALUATION CRITERIA #4		
4	<p><b><u>ACCOUNT REPRESENTATION</u></b></p> <ul style="list-style-type: none"> <li>i. <b><u>Account Manager:</u></b> The District requires proposers to designate an Account Manager. Proposer described the experience of the individual(s) that demonstrates their knowledge, skills and ability to support the District in</li> </ul>	

	<p>achieving the stated goals and delivering quality work products. Account Manager(s) must be timely with responses to District emails and phone calls. It is desirable that Account Manager(s) are available to meet with key District personnel within 24 hours of a meeting request. Include resume(s) for proposed Account Manager(s). They shall demonstrate ten years or more of executive consulting services with government entities. Experience supporting school districts is preferred. A Bachelor's degree or higher in communications, media, journalism or public relations is desired</p> <p>ii. <b>Key Personnel:</b> Optionally, other key personnel may be proposed, with resumes included.</p>	10%
<b>EVALUATION CRITERIA #5</b>		
5	<p><b>UNDERSTANDING THE COMMUNITY</b>  Demonstrate an understanding of the Lee County community. Articulate Proposer's understanding of the community's diversity. Some examples include:</p> <ul style="list-style-type: none"> <li>i. Education</li> <li>ii. Socio-Economic composition</li> <li>iii. Ethnic diversity and multi-lingual population</li> <li>iv. Business community</li> </ul>	10%
<b>EVALUATION CRITERIA #6</b>		
6	<p><b>PRICING</b>  Proposal Response Form was submitted. Pricing includes firm fixed fees for each task and hourly labor rates for additional support. Pricing shall be all inclusive.</p>	10%
<b>EVALUATION CRITERIA #7</b>		
7	<p><b>CORPORATE OVERVIEW</b>  Proposer described how and when their firm was founded, the location of the office from which service will be performed, the number of partners, managers, supervisors, senior management, other professional staff, the type of organization, and the organizational structure. In addition, responded to each question using the numbered format below:</p> <ul style="list-style-type: none"> <li>i. Date of business inception under current name: ____ / ____ / ____ (mm/dd/yyyy).</li> <li>ii. Ownership (describe in detail).</li> <li>iii. Explain any previous and/or anticipated changes to Proposer's organizational structure and/or distribution of ownership.</li> <li>iv. Affiliated organizations/accreditations/partnerships</li> <li>v. Describe Proposer's business profile in the state of Florida.</li> <li>vi. Describe Proposer's regulatory agency actions and litigation in the past 5 years, both as complainant and defendant.</li> <li>vii. Describe the ethics standards in place at Proposer's firm and provide copy of such.</li> </ul>	9%
<b>EVALUATION CRITERIA #8</b>		
8	<p><b>REFERENCES</b>  Reference #1 - provided a description of the overall performance, knowledge and expertise in the Proposers' ability to perform their contracted services.</p>	2%
	<p>Reference #2 - provided a description of the overall performance, knowledge and expertise in the Proposers' ability to perform their contracted services.</p>	2%
	<p>Reference #3 - provided a description of the overall performance, knowledge and expertise in the Proposers' ability to perform their contracted services.</p>	2%
<b>TOTAL POSSIBLE POINTS</b>		<b>100%</b>

Based on the scores Proposers will be ranked and one or more Proposers may be selected to commence negotiations. The District reserves the right to create, and select Proposers from a “short list” in order to enter into final contract negotiations with none, one or more Proposers, with the intent of awarding a contract and producing terms and conditions to reflect the outcome of the negotiations. Proposers are cautioned to present their best offer with their proposal as the District may select a proposal for award without further negotiation. The District reserves the right to conduct optional interviews/presentations with none, some or all Proposers. The following criteria will be used to evaluate presentations and/or interviews of one or more “short listed” Proposers.

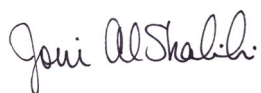
### **SCORING OF INTERVIEWS**

<b>EVALUATION CRITERIA #1</b>		<b>WEIGHTED PERCENTAGE</b>
1	<b><u>PRICING</u></b> Best and Final Offer	40%
<b>EVALUATION CRITERIA #2</b>		
2	<b><u>PROJECT APPROACH</u></b> Proposer described the approach to be applied to implement the tasks defined in the Scope of Work herein. i. Described how each task will be implemented. ii. Described measures of success for each task and deliverable. iii. Provided a sample timeline for a sample organization related project depicting schedule, resources and milestones.	30%
<b>EVALUATION CRITERIA #3</b>		
3	<b><u>RELATED EXPERIENCE</u></b> The Proposer’s provided descriptions of at least three, and no more than five, similar sized clients that have been serviced in the past five (5) years, that demonstrated expertise in marketing services.	20%
<b>EVALUATION CRITERIA #4</b>		
4	<b><u>INTERVIEW TEAM &amp; CORPORATE OVERVIEW</u></b> Proposer described the organizational structure. i. Business locations within the State of Florida. ii. Identified account points of contact. iii. The Proposer described the number of employees for each position and their role in support to support the requirements of this solicitation.	10%
<b>TOTAL POSSIBLE POINTS</b>		<b>100%</b>

**NOTE: In the event of a tie, see section 39 of the General Terms and Conditions.**

There are no other changes at this time. Please acknowledge this addendum via Fillable Forms, Attachment B - Addenda Acknowledgement Form, in your submittal.

Thank you for your interest in The School District of Lee County.



Joni Al-Shabibi  
Procurement Agent