

ATTACHMENT 1
SCOPE OF WORK
For
ON – CALL MARKETING AND COMMUNICATIONS SERVICES

SECTION I – GENERAL INFORMATION

1. Background

Gold Coast Transit District (GCTD) is Ventura County largest public transportation provider serving 2 million passenger trips annually. It operates fixed-route and paratransit service in the cities of Ojai, Oxnard, Port Hueneme, Ventura, and the unincorporated county areas between the cities. GCTD operates a fleet of nearly 80 vehicles throughout a service area of approximately 91 square miles with a population of 375,000.

2. Action Dates

Milestone	
Issue RFQ	2/17/2022
Deadline for Bidder's Questions	3/3/2022
GCTD Response to Questions	3/9/2022
Quotes Due Date	3/16/2022

SECTION II-PURPOSE

GCTD's in-house Planning and Marketing staff experience periods of high-work volume, requiring additional temporary professional services in the areas of marketing, communications, public relations, event planning and other general project management on an as-needed basis. The number of assignments issued by GCTD shall depend solely upon the district's actual need for services.

SECTION III-SCOPE of WORK

The major objective of the Scope of Services is to obtain a full service, experienced and versatile marketing and communications contractor with transit-related experience that demonstrates knowledge of public transportation and competence in many areas and can perform a broad range of tasks with creativity, efficiency and accuracy. Proficiency in Adobe Creative Suite software, Social Media Platforms, WordPress, Microsoft Office required. Knowledge of transit advertising, media buying/selling, highly preferred.

The Contractor's service may consist of the following:

1. Manage GCTD's Transit Advertising Program

- Respond to all inquiries for transit advertising and disseminate general information and rates cards.
- Maintain and update advertiser inventory log.
- Negotiate, prepare, and finalize advertising contracts.
- Work with GCTD staff to coordinate the installation and removal of bus advertising.

2. Assist with Public/ Media Relations

- Develop a wide range of materials such as media kits, talking points, press releases.
- Coordinate and schedule press interviews with GCTD staff
- Set-up and stage press conferences.
- Confer with GCTD staff to develop consistent messaging and help to develop talking points, speeches, editorial pieces.
- Provide media training and ongoing interview preparation.

3. Provide Social Media Coordination

- Write and edit copy and graphics for GCTD's social media networks including Facebook, Instagram, and Twitter.
- Create engaging videos and reels for Instagram and TikTok.
- Develop monthly content calendar for social media platforms.
- Engage social media followers and respond to comments (upon approval from CGTD Staff).
- Provide quarterly analytics report to review overall performance and discuss ongoing trends.

4. Place Media Buys

- Craft media plans to maximize awareness and reach of GCTD's campaigns.
- Negotiate and place media buys in the Ventura County media market. Media can include print, TV, radio and digital. A commission of no more than 15% of the net total will be paid.

- Provide a post-buy analysis performance report that includes, notable results, impressions, reach, etc.

5. Assist with Event Planning

- Under the direction of GCTD, assist in the planning and implementation of the district's public events.
- Facilitate logistics, guest lists, invitations, speakers, promotional materials, giveaways, etc.

6. General Project Coordination

- Develop flyers, posters and brochures as needed (GCTD staff to provide content).
- Participate in conference calls, in-person meetings to discuss status of projects and upcoming communications strategies.
- Provide graphic design services when needed.
- Update website with revised and/or new documents per GCTD's staff direction, as needed.
- Review plans and reports, such as Marketing and Communication Plans developed by GCTD, and provide feedback.

Upon completion of each project, Contractor will deliver electronic copies of all associated files to GCTD. All design files should be provided in InDesign and/or Illustrator. All Designs need to be approved by Cynthia Torres Duque, before proceeding forward.

Project Manager: The GCTD Project Manager will be Cynthia Torres Duque, Communications and Marketing Manager.

SECTION V- SPECIAL PROVISIONS

All offerors must submit the following information:

1. Content of Quotes:

Quotes shall be no more than 10 standard 8.5" X 11" pages plus the attachments to this RFQ which must be submitted with the quote include, Bidders List Form (available for download on Public Purchase website), Reference Form (available for download on Public Purchase website), and Proposal Form attached. Quotes should include the following and be submitted

in the order presented: All forms and quotes must be submitted in Public Purchase.

- a. **Cover Letter:** Indicate the submitter's interest in entering into a contract with GCTD for the requirements described herein. Address any concerns or indicate lack of concerns you have with the requirements and any General Provisions and Other Provisions that would be included in a contract. Include a certification that states you agree to exert your "best efforts" in fulfilling your responsibilities under a contract to support GCTD with the scope of services described above.
- b. **General Background:** Include your firm's growth pattern, types of services provided, number of personnel employed, number of personnel specializing in the type of labor required for services of the type described herein and number of personnel specializing in working with public agencies.

Firm Experience and Technical Expertise: Provide, in detail, your firm's experience and technical expertise, include projects/contracts related to public agencies and the type of services described herein.

- c. **Staffing Plan:** Provide a proposed staffing plan that would assist in meeting GCTD's requirements. Include resume/s of personnel who will be assigned to our agency.
- d. **References:** Using Reference Form, provide at least three names, addresses and phone numbers, and e-mail addresses of individuals able to discuss performance and reputation of the firm relative to work of the nature specified to support GCTD (available for download on Public Purchase website).
- e. **Information Form:** In order to provide GCTD with general information about your firm, complete and return the "Bidders List Form" with your submission (available for download on Public Purchase website).
- f. **Pricing:** will include the following (using Quote Form).
 - **Labor:** Labor estimates should include Labor Category and hourly rate.

Rates shall be firm fixed for the duration of the contract and be listed on the "Request for Quotation" form.

2. Award of Contract:

The contract will be awarded to the responsive, responsible Bidder with the lowest overall price and has the capability of meeting GCTD's On-Call Marketing and Communication Services Specification stated herein. GCTD will be the sole judge as to the definition and interpretation of the terms "responsible," "responsive" and "capability" and will base this determination, partly, on the information provided by the bidder as stated above Section V.

3. Contract Term:

The initial term of the contract will be for one (1) year and by mutual agreement may be renewed on an annual basis for up to two (2) additional one-year periods. Prices shall be firm fixed during initial term.

Prior to exercising an option, GCTD shall serve notice to the Contractor of its intention to extend the contract into and through an additional one-year period. Such notice shall not be deemed to commit GCTD to such extension, nor shall it be binding upon the Contractor if postmarked less than sixty (60) days prior to the expiration of the current contract period.

In the event of any extension of this contract beyond the initial one-year period, GCTD reserves the right to either accept or reject any price adjustments submitted in writing ninety (90) days prior to the end of the current contract period as part of GCTD's consideration for the contract extension.

It shall be mutually understood and agreed that all work performed, and services provided under any exercised option shall be in strict compliance with all requirements of the contract, as amended.

Additionally, it shall be mutually understood and agreed that: 1) GCTD is under no obligation to exercise the option(s); 2) No representations have been made by GCTD committing it to exercise the option(s); and 3) GCTD may procure such option requirements elsewhere. Such option(s) may be exercised by modification of the contract or by issuance of a new contract.

Continuation of the contract is subject to the appropriation of funds for such purpose by the Board of Directors. If funds to effect such continued payment are not appropriated, GCTD may terminate this project as thereby affected and Contractor will relieve GCTD of any further obligation therefore.

4. Maximum Price Increase/Decrease

Prices established in the contract are valid for the first contract year. The contract year is from May 1 through May 31. Since contract terms provide for additional year(s) to the basic contract and/or option years, prices for specified

items for those years may be adjusted to reflect inflationary or deflationary trends in the economy. Since there is no established way to determine in advance what prices will actually be a year or more into the future, an equitable method of determining the maximum contract prices for subsequent contract years is to apply a statistically derived percentage increase or decrease (factor) to existing contract prices. The Bureau of Labor Statistics (BLS) routinely publishes adjustments to the Consumer Price Index (CPI) based on research into various aspects of the economy. Although adjustments are broken down by various commodities, economy sectors, services, sections of the country, etc., no breakdown adequately reflects actual experience for the items being purchased herewith. However, the CPI for All Urban Consumers (CPI-U) for all items is a generally accepted measure of the impact of inflationary and deflationary pressures on the economy and will be used by GCTD in calculations identified below.

So that all initial Bidders are treated equitably and at the same time assure GCTD prices won't be raised without limits, an adjustment method and criteria are established in advance as follows:

- a. The adjustment factor only applies to Option Year prices for all items on the Bid Form.
- b. The CPI-U will be used to determine the maximum price adjustment, up or down, for items for which it is authorized.
- c. The Contractor shall notify GCTD by February 1st, of each contract year of the price it proposes to use effective the start of the following contract year. The notice shall include verifiable documentation (e.g., price list changes from manufacturers/distributors) to justify the proposed price even if it remains unchanged.
- d. GCTD shall compare the prices proposed by the Contractor with the figure derived by using the "Not Seasonally Adjusted U.S. City Average" CPI-U percentage increase or decrease applicable for the most recent calendar year. The applicable percent is for "All Items" and is available in the U.S. Department of Labor, Bureau of Labor Statistics website found at www.bls.gov/cpi. Appendix B includes pictures of the applicable pages from the website and how to identify the applicable percent increase or decrease in the CPI-U from the preceding year.
- e. The use of the CPI-U will be cumulative so that over time adjustments can be made to reflect possible industry practices of making larger infrequent price changes rather than frequent smaller price changes.
- f. Price changes, if any, will be made effective the beginning of the contract year and will remain in effect for the contract year. Documentation to

justify price changes the Contractor may receive from its suppliers during the year may be provided to GCTD the following January to justify a contract price change as explained in this provision.

g. Examples for application of the adjustment factor in determining the actual price for the next year(s):

1). Assume the current price is \$100, the CPI-U for All Items from December 2009 to December 2010 increases by 2% and the Contractor proposes and can justify a price of \$101. Applying the 2% factor to \$100 means the actual price cannot exceed \$102. Therefore, the proposed price of \$101 may be accepted.

2). For the above example, assume it is the following year, the price is \$101, the CPI-U increases by 3% and the Contractor proposes and can justify a price of \$104. Applying the 3% factor to \$101 means the actual price cannot exceed \$104.03. Therefore, the proposed price of \$104 may be accepted.

3). Assume the current price is \$100, the CPI-U is -1% and the Contractor proposes and can justify no price increase. Applying the -1% factor means the actual price cannot exceed \$99. Therefore, the proposed price of \$100 is not acceptable and the actual price would be \$99.

4). Assume the current price is \$100, the CPI-U is 2% the second year and 3% the third year and the Contractor proposes and can justify no change the second year and a price of \$104 the third year. Applying the 2% factor the second year means the actual price cannot exceed \$102. However, since no change is proposed, the price remains \$100 for the second year. Applying the 3% factor for the third year to the previous year maximum of \$102 means the actual price cannot exceed \$105.06 for the third year. Therefore, the proposed price of \$104 may be accepted.