



# Juvenile Welfare Board

Investing in children. Strengthening our community.

## **REQUEST FOR PROPOSALS**

### **For**

Early Childhood Public Awareness Campaign

### **PRE-PROPOSAL CONFERENCE** (attendance is optional)

Friday, October 22, 2021

10:15 AM, Zoom Webinar

### **SUBMISSION DUE DATE AND TIME**

November 30, 2021 Noon EST

### **DELIVERY OF PROPOSALS**

Written proposals must be submitted via email to [RFP@jwbpinellas.org](mailto:RFP@jwbpinellas.org)

Juvenile Welfare Board of Pinellas County  
14155 58<sup>th</sup> Street North, Suite 100  
Clearwater, FL 33760  
(727) 453-5600

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### **ATTACHED DOCUMENTS:**

**FORM 2 – COST PROPOSAL.xlsx**

## 1.0 INSTRUCTIONS

### 1.1 **JUVENILE WELFARE BOARD OF PINELLAS COUNTY**

The Juvenile Welfare Board of Pinellas County (JWB) was established in 1946 as the nation's first countywide agency dedicated to investing property tax revenues to better the lives of children and families. JWB was created by a Special Act of the Florida Legislature and is an Independent Special District pursuant to F.S. Ch. 189. Guided by its mission, JWB invests in partnerships, innovation, and advocacy to strengthen Pinellas County children and families. JWB's efforts also strengthen neighborhoods, communities, and schools, making Pinellas County a better place for everyone to live.

JWB is governed by an 11-member Board that guides taxpayer investments, which are strategically focused across six result areas designed to improve the lives of Pinellas children and families: Early Childhood Development, School Readiness, School Success, Prevention of Child Abuse and Neglect, Strengthening Community, and Organizational Capacity.

JWB values every child, embraces collaboration, is accountable and results-driven, pursues innovation, and values equity, diversity, and inclusion. These set of values guide decisions to build supports, allocate resources, and establish partnerships. The vision is that all children in Pinellas County will have equitable opportunity to fulfill their potential and achieve meaningful and purposeful lives as a result of the efforts of JWB and its partners.

### 1.2 **SCHEDULE OF ACTIVITIES (DATES SUBJECT TO CHANGE)**

An addendum will be issued if it is necessary to adjust any specific dates and times below:

<b>Date</b>	<b>Activity</b>
10/15/2021	RFP Released
10/22/2021	Optional Pre-Proposal Conference at 10:15 AM, Zoom Webinar
10/26/2021	Deadline for Receipt of Questions by 12:00 PM EST
10/28/2021	Written Responses to Questions Released
11/30/2021	Proposal Submission Due Date by 12:00 PM EST
01/06/2022	Evaluation Committee Meeting at 9:30 AM, Juvenile Welfare Board, Edmonds Neri Conference Room
01/21/2022 <sup>1</sup>	Presentations by Top Proposers
01/21/2022	Evaluation Committee Meeting at 3:00 PM, Juvenile Welfare Board, Edmonds Neri Conference Room
2/10/2022	Board Action to Award at 9:00 AM, Juvenile Welfare Board, Room Edmonds Neri Conference Room
2/10/2022	Announce Intent to Award
On or after 02/17/2022	Execute Agreement

<sup>1</sup> JWB has scheduled one day for interviews and is requesting Proposers to be available on that date. Pursuant to Section 286.0113(2)(b)1, Florida Statutes, vendor oral presentations are exempt from public meeting requirements and this meeting is not open to the public.

### **1.3 COMMUNICATION WITH JWB**

All Proposer communication concerning this Request for Proposals (RFP) must be directed to the Budget and Business Services Division. The point of contact is:

Juvenile Welfare Board of Pinellas County  
Lorrayne Hayes  
14155 58<sup>TH</sup> Street North, Suite 100  
Clearwater, FL 33760  
[rfp@jwbpinellas.org](mailto:rfp@jwbpinellas.org)  
727-453-5654

### **1.4 DEMANDSTAR**

This RFP and the attached documents may be requested from JWB's website at [jwbpinellas.org](http://jwbpinellas.org). Additionally, JWB is using DemandStar to assist with distribution and communication of this RFP and any addenda. Copies of this RFP, attached documents, and any addenda may be obtained from DemandStar at [www.demandstar.com](http://www.demandstar.com).

Proposer's who obtain copies of this RFP from sources other than DemandStar risk the potential of not receiving addenda, since their names will not be included on the list of firms interested in this RFP.

### **1.5 PRE-PROPOSAL CONFERENCE**

An optional Funding Workshop will be held as a virtual meeting at 10:15 AM EST on October 22, 2021. The virtual public meeting will be held as a Zoom Webinar. The public may connect to the virtual meeting as follows:

**Connect via Zoom Webinar:**

<https://us02web.zoom.us/j/87931519120?pwd=NVp2QTBCYW5Qc0Y2aWNvcVlka1NDZz09>

**Passcode:** JWB

**Connect via telephone:** US: +1 929 436 2866 or +1 301 715 8592 or +1 312 626 6799 or +1 669 900 6833 or +1 253 215 8782 or +1 346 248 7799 or 877 853 5247 (Toll Free) or 888 788 0099 (Toll Free)

**Webinar ID:** Webinar ID: 879 3151 9120 Passcode: 774170

International numbers available: <https://us02web.zoom.us/j/kcPKJ6ym0d>

**To ask a question or participate in the conference via telephone connection,** at the appropriate time, press \*9

Persons who are deaf or hard of hearing may provide public input through these numbers via the State of Florida's relay service, at 7-1-1. For more visit [www.ftri.org/relay/faqs](http://www.ftri.org/relay/faqs).

All interested parties are urged to attend. The purpose of the pre-proposal conference is to allow potential Proposers an opportunity to present questions to staff and obtain clarification of the RFP requirements. Oral statements, oral responses to questions, or oral instructions will not constitute an amendment to this RFP. Responses to questions may be handled as an addendum if the response would provide clarification to requirements of the Proposal. If this occurs, a written addendum will be emailed to all who requested a copy of this solicitation and posted on the JWB website. For official written question responses or if you are unable to attend, please see instructions in Section 1.6.

#### **1.6 WRITTEN REQUESTS FOR INTERPRETATIONS/CLARIFICATIONS**

All questions pertaining to the terms and conditions or scope of work of this RFP must be submitted in writing to [rfp@jwbpinellas.org](mailto:rfp@jwbpinellas.org).

**The deadline for questions is October 26, 2021.** Please use email subject line “Early Childhood Public Awareness Campaign RFP Question”. Beyond that date and time, questions will not be answered.

**Written questions and responses will become public record and will be made available via the website ([www.jwbpinellas.org](http://www.jwbpinellas.org)) on the date identified in section 1.2.** Responses to questions may be handled as an addendum if the response provides clarification to requirements of the RFP. If this occurs, a written addendum will be posted on the same website, [www.jwbpinellas.org](http://www.jwbpinellas.org), from which you obtained this proposal and DemandStar.

#### **1.7 ADA REQUIREMENT FOR PUBLIC MEETINGS**

Persons with disabilities requiring reasonable accommodation to participate in public meetings must submit a request via email to: [ADArequest@jwbpinellas.org](mailto:ADArequest@jwbpinellas.org) or by phone 727-453-5600, at least 72 hours prior to the meeting.

#### **1.8 ADDENDA ACKNOWLEDGEMENT**

Before submitting your proposal you should check the website, [www.jwbpinellas.org](http://www.jwbpinellas.org), to download any addenda that may have been issued. Receipt and acceptance of an addendum, if applicable, is to be acknowledged by signing and returning the document with the Proposal.

#### **1.9 REQUIREMENTS FOR SIGNING PROPOSAL**

The Proposal Signature Form must be completed. This form must be signed in blue ink by an authorized representative of the firm as defined below:

If an individual or sole proprietorship, the owner may sign.

If a partnership, a general partner may sign.

If a limited liability company, a “member” may sign or “manager” may sign if so specified by the articles of organization.

If a corporation (for profit or not-for-profit), the CEO, President or Vice-President may sign.

If another individual is granted authority to sign for one of the types of entities above, and for all other types of entities, authority to sign must be granted by an official document from the entity authorizing him/her to sign and must be submitted with the Proposal.

#### **1.10 EXPENSES INCURRED IN PREPARING PROPOSAL**

JWB accepts no responsibility for any expense incurred by the Proposer in the preparation and presentation of a Proposal. Such expenses shall be borne exclusively by the Proposer.

#### **1.11 PROPOSAL SUBMISSION**

Proposals signed by the appropriate principal of the firm using the required format provided herein must be received by email at [rfp@jwbpinellas.org](mailto:rfp@jwbpinellas.org) on or before the due date/time identified in section 1.2 to be considered. **Late submissions will not be considered.**

Submission emails must include “Early Childhood Public Awareness Campaign RFP – [Proposer’s Name]” in the subject line, where [Proposer’s Name] represents the Proposer’s organization’s name. The maximum email size JWB can receive is 10MB. If the submission email, including any attachments, is greater than 10MB, please send multiple separate emails which are less than the 10MB maximum.

It is the responsibility of the Proposer to ensure that the Proposal is received by JWB on time at the right location. JWB will reply to confirm receipt of all Proposals. Proposers who do not receive an email confirmation receipt should contact Lorraine Hayes, Sr. Contract Manager and Purchasing Agent, at 727-453-5654 to verify email receipt. Proposers are encouraged to respond early. JWB is not responsible if technical difficulties are encountered during the submission process on submission due date. The following documents must be emailed to JWB as attachments with the naming and electronic file formats shown below:

1. Early Childhood Public Awareness Campaign RFP – Proposal [Proposer’s Name].pdf
2. Early Childhood Public Awareness Campaign RFP –Form 2- Cost Proposal [Proposer’s Name].xlsx

The Proposal must be assembled in the following order. Make sure to number each page, including attachments. All Proposers must be typed single-spaced using 12-point font. Proposals must be assembled as listed below:

1. Signed Addenda, if issued
2. Form 1 – Proposal Signature Form (signed)
3. Narrative Response
  - attach resume or LinkedIn profile of key personnel
  - attach draft of Statement of Work
4. Form 3 - Non-Collusion Affidavit (signed)
5. Form 4 - References
6. Form 5 – Service Agreement Terms & Conditions Compliance Checklist
7. Form 6 - IRS W-9

A Proposal Checklist, Attachment 2, has been provided to assist proposers only and is not to be submitted with the Proposal.

## **1.12 RIGHTS OF JUVENILE WELFARE BOARD IN REQUEST FOR PROPOSAL PROCESS**

In addition to all other rights of JWB under Florida law, JWB specifically reserves the following:

- a) the right to rank proposals.
- b) the right to select the Proposal that it believes will serve the best interest of JWB.
- c) the right to cancel the entire Request for Proposal.
- d) the right to reject any Proposal as nonresponsive and disqualify without scoring if it contains substantive exceptions to the terms and conditions of the RFP that cannot be rectified without affecting the price, quality, delivery or performance of the services being procured.
- e) the right to waive any informalities or non-material irregularities of a Proposal.
- f) the right to request any necessary clarifications or proposal data, provided that information requested does not change the price, quality, quantity, delivery, or performance time of the services/goods being procured.
- g) the right to require the Proposer to perform the services required on the basis of the original proposals without negotiation.
- h) the right to negotiate with the Proposer(s).

## **1.13 EVALUATION**

**Fatal Criteria:** The following fatal criteria must be met for a proposal to be forwarded to the evaluation committee and considered for further evaluation. Failure to meet all of these criteria will automatically disqualify the Proposer's response from further consideration:

- 1. The Proposal is received by the due date and time,
- 2. The Proposal Signature Form is signed by an authorized company officer.

Responses to this RFP will be evaluated and ranked by a team of JWB Staff and 0-3 Think Tank Members. JWB will use the following process to make a recommendation to the Board for awards:

**Round 1 - Evaluation:** For those Proposer's whose proposals pass the fatal criteria, the following criteria, with the points shown for each, will be used by the evaluation committee to evaluate and score the proposals:

<b><u>Evaluation Criteria</u></b>	<b><u>Points</u></b>
Firm Qualifications and Experience	35%
Understanding, Approach, and Project Work Plan	35%
Key Project Personnel	20%
Reasonableness of Cost	10%
<b>Total Potential Points</b>	<b>100%</b>

An additional five (5) points are available for Proposers who submit Form 5 with no exceptions taken, and includes signature from the Proposer's authorized signer. While additional or modified terms and conditions may be necessary depending on the responses to the RFP, any exceptions or conflicts must be stated explicitly.

**Round 2 - Evaluation:** The top Proposers in the Round 1 Evaluation will be invited to make a ninety (90) minute presentation, to include:

- Introduction of key staff to be assigned to the project, firm qualifications, and experience of key personnel
- Understanding of the Campaign scope of work; proposed approach to create, implement, and launch the Campaign; and a proposed project work plan which includes a communications plan, concept testing plan, success measurement plan, and project schedule
- Up to three (3) similar campaigns the firm has created similar in scope, scale, and complexity to the project; include approach, timeline, target audiences, success metrics, and lessons learned
- Explanation of costs
- Questions and answers

### **Financial Resources**

Proposers selected for short-listing in the evaluation shall be required to provide documentation of their financial stability for providing services and meeting other financial obligations. Such documentation shall include a copy of the company's most recent financial statements, tax return or a Dunn & Bradstreet Report (D & B).

At the conclusion of the round two activities, the top Proposers will be evaluated against the following criteria with the total possible points shown for each, which will be combined with their Round 1 scores:

<b><u>Evaluation Criteria</u></b>	<b><u>Points</u></b>
Approach, Similar Campaigns, Qualifications, and Experience	15%
Presentation and Responses to Questions	10%
Reference Checks and Financial Stability	5%
Reasonableness of Cost	5%
<b>Total Potential Points</b>	<b>35%</b>

The Evaluation Committee's recommendation will be presented to the Board for approval and award.

## **1.14 AWARD AND AGREEMENT**

It is anticipated that one award will be made. JWB shall publicly post the formal award on JWB's website no more than three (3) full business days after the decision to award the agreement to the Proposer is made. All Proposers will be sent an email with the notice of award to the email address provided in the Proposal.

The successful Proposer will be required to execute the attached Service Agreement. The agreement will remain valid for a period of six (6) months ("Initial Term") with three (3) optional one-year renewals for possible Additional Services, unless terminated earlier in accordance with the agreement terms.



### **1.15 TAX EXEMPT STATUS**

JWB is exempt from paying sales taxes. JWB's State Taxpayers Certificate of Exemption Number is 85-8012646116C-8. JWB is exempt from federal excise tax. All prices should be quoted FOB Clearwater, FL.

### **1.16 PROPOSAL OFFER ACCEPTANCE PERIOD**

In order to allow for an adequate evaluation, JWB requires an offer in response to a Proposal to remain valid and irrevocable for 120 days after the Proposal opening time and date.

### **1.17 PUBLIC RECORDS**

In accordance with Section 119.071(1)(b), F.S., all Proposals submitted shall become public record after thirty (30) days from opening, or earlier if JWB provides notice of an intended decision before the thirty (30) days expires. If JWB rejects all Proposals and concurrently provides notice of its intent to reissue the RFP, the rejected Proposals remain exempt from the public records requirement until such time that JWB provides notice of an intended decision concerning the reissued RFP or until JWB withdraws the reissued RFP. A Proposal is not exempt from public record disclosure for longer than twelve (12) months after the initial JWB notice rejecting all Proposals. Information that is confidential and/or exempt from public record disclosure will not be produced provided that it is legally required that it not be produced or a specific exemption from disclosure exists as determined solely by JWB. If you believe you are submitting anything that is confidential and/or exempt from disclosure you must clearly mark it as set forth in the instructions in Section 1.19 below. However, the determination of whether something is confidential and/or exempt from disclosure remains in JWB's sole discretion.

### **1.18 TRADE SECRET AND CONFIDENTIAL MATERIALS**

All Proposals submitted become public records as set forth above. Unless a specific exemption exists from disclosure, all documents submitted will be released in response to a public records request. If the Proposal includes material which is deemed a trade secret, as defined by Section 812.081, F.S., the following statement should be included in the Proposal "Trade Secrets as defined by Section 812.081, F.S. are contained in this Proposal and shall not be used or disclosed by JWB except for JWB's purpose of evaluating this Proposal." However, if a contract is awarded as a result of this Proposal, JWB shall have the right to use the information designated as trade secrets to the extent subsequently agreed upon in writing between the Proposer and JWB. This does not limit JWB's right to use or disclose the information if the same information is obtained from another source. In addition, each and every page that contains information that the Proposer contends contains information that is a Trade Secret as defined by Section 812.081, F.S., must be clearly marked and cite the specific statute language that applies to/justifies the legal exclusion, as such by the Proposer prior to submission to JWB.

In addition, if a Proposer believes that a Proposal contains any information that is confidential and/or exempt from the disclosure requirements of Chapter 119, F.S., each page containing such information must be clearly marked as such by the Proposer prior to submission along with a citation to a statutory exemption or other law prohibiting the disclosure of the marked information.

Notwithstanding anything to the contrary, nothing contained in the Proposal shall be deemed or interpreted to restrict or prevent JWB from complying with the disclosure requirements of Chapter 119, F.S., when material or information is incorrectly, as determined solely within JWB's discretion, identified as confidential and/or exempt from disclosure as a Trade Secret, other statutory exemption or otherwise by the Proposer.

Proposers are strongly discouraged from submitting any information that the Proposer feels is confidential and/or exempt from public records disclosure such as information that is a Trade Secret per 812.081 as JWB will comply with the public records law and will make the determination within its sole discretion as to whether information submitted by a Proposer that a Proposer claims is exempt from disclosure is in fact, exempt from disclosure. By submitting this Proposal, the Proposer submits all information at its own risk and covenants not to sue JWB and waives any claim against JWB in connection with or as a result of any disclosures by JWB of any information contained in the Proposal. By submitting the Proposal, the Proposer agrees that JWB may use and disclose all information submitted for any purpose JWB sees fit and that it is within JWB's sole discretion to determine if any information submitted is confidential and/or exempt from disclosure.

#### **1.19 PUBLIC ENTITY CRIMES**

The Proposer, by submitting a Proposal, attests they have not been placed on the convicted vendor list.

Per Section 287.133, Florida Statutes, a person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a bid, proposal, or reply on a contract to provide any goods or services to a public entity; may not submit a bid, proposal, or reply on a contract with a public entity for the construction or repair of a public building or public work; may not submit bids, proposals, or replies on leases of real property to a public entity; may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity; and may not transact business with any public entity in excess of the threshold amount provided in s. [287.017](#) for CATEGORY TWO for a period of 36 months following the date of being placed on the convicted vendor list.

#### **1.20 CERTIFICATION OF ELIGIBILITY TO SUBMIT BID/PROPOSAL**

The Proposer, by submitting Proposal, attests they are eligible to contract with JWB.

In compliance with F.S. 287.135(3)(a), a firm is ineligible to and may not enter into a contract with JWB if the firm is on the Scrutinized Companies that Boycott Israel List, created pursuant to s. 215.4725 or, is engaged in a boycott of Israel. In compliance with F.S. 287.135(3)(b), for contracts of \$1 million or more, a firm is ineligible to and may not enter into a contract with JWB if the firm is (1) is on the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Section List, created pursuant to s. 215.473 or, (2) is engaged in business operations in Cuba or Syria. By entering into this Agreement, you are certifying that you are eligible to contract with JWB and are not participating in a boycott of Israel, are not on the Scrutinized Companies with Activities in Sudan List, are not on the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List and that you do not have business operations in Cuba or Syria. In addition, this Agreement may be terminated if firm (1) has found to have submitted a false certification,

(2) has been placed on the Scrutinized Companies that Boycott Israel List, or is engaged in a boycott of Israel, (3) has been placed on the Scrutinized Companies with Activities In Sudan List or the Scrutinized Companies with Activities in The Iran Petroleum Energy Sector List; or, (4) has been engaged in business operations in Cuba or Syria.

#### **1.21 CONFLICT OF INTEREST**

The Proposer represents that it presently has no interest and shall acquire no interest, either direct or indirect, which would conflict in any manner with the performance or services required hereunder. The Proposer further represents that no person having any such interest shall be employed by him/her during the agreement term and any extensions.

The Proposer shall promptly notify the JWB point of contact, in writing, of all potential conflicts of interest for any prospective business association, interest, or other circumstance, which may influence or appear to influence the Proposer's judgment or quality of services being provided hereunder. Such written notification shall identify the prospective business association, interest or circumstance, the nature of work that the Proposer may undertake and request an opinion of JWB as to whether the association, interest or circumstance would, in the opinion of JWB, constitute a conflict of interest if entered into by the Proposer. JWB agrees to notify the Proposer of its opinion, within thirty days of receipt of notification by the Proposer.

#### **1.22 EVERIFY**

In accordance with F. S. 448.095, no later than the first date of the term of any agreement made with a Proposer, Proposer and any subcontractor performing work under said Agreement must register with and use the U.S. Department of Homeland Security's E-Verify system, <https://e-verify.uscis.gov/emp>, to verify the work authorization status of all employees hired on or after the first date of the term of any agreement and during the remainder of the term of such agreement.

#### **1.23 PROTEST PROCEDURE**

*Bid/Proposal Protests.* Any actual or prospective bidder or proposer, who is allegedly aggrieved in connection with the issuance of a bid or proposal package or pending award of a contract, may protest the decision by following the procedure below.

*Posting.* JWB shall publicly post the award on JWB's website within three full business days after the JWB Board award decision has been made. All bidders or proposer will be sent an email with the notice of award to the email address provided in the bid or proposal.

*Requirements to Protest.*

- a) A formal written protest must be filed no later than 5:00 PM, on the fifth business day after the notice of award has been posted. The formal written protest shall identify the protesting party and the solicitation involved; include a clear statement of the grounds on which the protest is based; refer to the statutes, laws, ordinances, applicable section(s) of the solicitation or Board policy, or other legal authorities which the protesting party deems applicable to such grounds; and specifically request the relief to which the protesting party deems itself entitled by Application of such authorities to such grounds.

- b) A formal written protest is considered filed when the JWB Chief Executive Officer receives it. Accordingly, a protest is not timely filed unless it is received within the time specified above. Failure to file a formal written protest within the time period specified shall constitute a waiver of the right to protest and result in relinquishment of all rights to protest by the actual or prospective Applicant.

*Sole Remedy.* These procedures shall be the sole remedy for challenging an award of bid or proposal. Bidders or proposers are prohibited from attempts to influence, persuade, or promote a protest through any other channels or means.

*Authority to Resolve.* The Chief Executive Officer shall resolve the protest in accordance with the terms of the bid or proposal and shall render a written decision to the protesting party no later than 5:00 PM on the fifth business day after the filing thereof.

*Review of Chief Executive Officer's Decision.*

- a) The protesting party may request a review of the Chief Executive Officer's decision by the Board by delivering a written request for review of the decision to the Chief Executive Officer by 5:00 PM on the fifth business day after the date of the written decision.
- b) The written notice shall include any written or physical materials, objects, statements, and arguments, which the Applicant deems relevant to the issues raised in the request for review.
- c) The Board will consider the request for review at the next regularly scheduled Board meeting after the request is received. It is within the Board's discretion whether to allow testimony or argument from the protesting party at the Board meeting. If it is determined by majority vote of Board members present at the meeting that the award is in violation of law or the regulations and internal procedures of the Budget and Business Services Division or any another applicable authority, the Board shall cancel or revise the award as deemed appropriate within three business days after the Board meeting.
- d) If it is determined by majority vote of Board members present at the meeting that the award should be upheld, the Board shall direct staff to notify the protesting party in writing of the Board decision with a copy furnished to all substantially affected persons or businesses within three business days of the Board meeting. The decision shall be final and conclusive as to JWB.

*Stay of Procurement during Protests.* The decision to stay a procurement during protests shall be at the sole discretion of the Chief Executive Officer.

## 2.0 SCOPE OF WORK

### 2.1 OVERVIEW

The Juvenile Welfare Board of Pinellas County (JWB) is seeking proposals from qualified and talented full-service public relations, communications, or marketing firms to work collaboratively with to develop, refine, and launch the Early Childhood Public Awareness Campaign (referenced therein as “Campaign”). The Campaign will include unified messaging, branded visuals, and marketing/media strategies to reach parents, family members, and other caregivers of infants and toddlers, ages birth to three. Aligned with the JWB Strategic Plan: FY21 – FY25, the Campaign’s goal is to help ensure children achieve critical development milestones<sup>1</sup>, and that practical applications of early childhood education principles<sup>2</sup> are understandable, known, and applied.

The Campaign is inspired by the fact that a child’s brain undergoes an amazing period of development from birth to age three, producing more than a million neural connections each second.<sup>3</sup> During the first 1,000 days, the brain grows more quickly than at any other time in a person’s life.<sup>4</sup> By age three, 80% of brain growth occurs, and during this time, skill gaps begin to become apparent among children from diverse socio-economic, geographic, and ethnic groups.<sup>5</sup> The Campaign’s main objective is to promote healthy interactions between the parent/caregiver and child in the first three years of life, taking advantage of everyday opportunities to educate and build baby’s brain. Ultimately, the Campaign aims to help give children a level playing field, so they enter kindergarten ready to learn and prepared for lifelong learning.

Using a multi-faceted approach, the Campaign is expected to include overarching messaging, branded visuals, and media/marketing strategies to reach parents and caregivers of children, ages birth to three, with subthemes to engage and educate the Campaign’s target audiences: young parents, fathers, grandparents, informal caregivers, and diverse populations (Refer to Section 2.4 Target Audiences). The Campaign is expected to feature multiple executions that include the development of a microsite, campaign guide/toolkit for partners, parent/caregiver education toolkits and collaterals, and a media/marketing plan to reach target audiences through an array of digital, offline, paid, and earned strategies (i.e. social media, website/app, geofencing, videos, email campaigns, TV/radio PSAs, print/digital/out-of-home advertising, press releases, etc.). The Campaign will also include a success measurement plan with key performance indicators/metrics to measure reach and results, and a process to collect, track, monitor, and analyze data on a routine basis with regular reports to the JWB Board.

JWB has convened a 0-3 Think Tank comprised of early childhood development and education experts who will help guide, inform, and champion the Campaign. JWB and the 0-3 Think Tank will collaborate with the successful firm, serving as content experts, devising an outreach plan, and assisting with the development of Campaign success indicators/metrics.

In Spring/Summer 2021, JWB held a series of discovery sessions with 0-3 Think Tank members, from which the following foundational ideas and themes for the Campaign were derived. (Refer to 0-3 Think Tank Thematic Analysis - Appendix “A”)

The Campaign is expected to incorporate these basic concepts:

- Parents are their child’s first and best teachers. No degree is needed to teach and train baby’s brain, and focus should be on building parents’ confidence, and on giving them tools, coaching, and encouragement.

- No app can replace the lap. Face-to-face interactions between adult and child are critical for bonding, attachment, and brain development.
- “Baby talk” does not mean imitating babies’ babbling or cooing sounds. Instead, it consists of fully grammatical speech that involves real words, elongated vowels, exaggerated tones of voice, higher pitches, and slower tempos spoken directly to babies to engage and invite them to respond (also called “parentese”).
- Small matters matter. There are countless everyday routine activities that offer opportunities to talk to babies and build their brains. For example, diaper changes, bath times, mealtimes, and bedtimes offer opportunities for parents or caregivers to narrate baby’s surroundings, talk through everyday activities, sing, count, point, play, read, and tell stories.

The Campaign is expected to build the four Cs”:

- **CONFIDENCE**– the Campaign will help parents and caregivers understand that no degree or certification is needed to train baby’s brain, and will strive to inspire confidence in their own capabilities and skills.
- **CAPABILITIES** – the Campaign will offer practical, educational approaches/ toolkits to ensure parents and caregivers have basic information on early brain development, early childhood education, and developmental milestones, as well as opportunities to develop skills through modeling and coaching.
- **CAPACITIES** – the Campaign will provide just-in-time information and resources and will take into consideration a parent’s capacity for learning and skills-building, as well as their unique backgrounds, socio-economic factors, and environment. The Campaign will also focus on everyday opportunities of avail to parents and caregivers.
- **COMMUNITIES** – the Campaign will strive to build communities through a variety of marketing, advertising, public relations, and outreach approaches to reach, educate, and engage parents and caregivers. It will also include strategies for target audiences and an outreach plan to engage and train Campaign ambassadors/champions.

The Campaign is also expected to:

- Reach families where they are and build in feedback loops to refine/adapt messaging, strategies, and approaches, as needed.
- Take into consideration unique backgrounds, socio-economic factors, racism, implicit biases, health disparities, and microaggressions.
- Position education as the great equalizer.
- Span multiple years with success indicators/metrics established for each year.

The Campaign work is divided into five main objectives or phases, with key objectives and deliverables for each. The successful Proposer will work collaboratively with JWB and/or the 0-3 Think Tank to complete each phase in accordance with the timeline (Refer to Section 2.6. Objectives, Deliverables, and Timeline).

## 2.2 **BACKGROUND**

In December 2019, Dr. Jamie McHale of the University of South Florida Center for Family Studies presented to the JWB Board on the importance of early brain development of children ages birth to three. Key takeaways of Dr. McHale’s presentation included:

- Babies are active processors, not passive vessels. More than a million new neural connections form every second in baby’s first years, and 80% of a child’s brain development happens in the first three years of life – 90% by the time the child reaches kindergarten.
- During the first 18 months of life, superhighways are paved in the baby’s brain – pathways that will last a lifetime. The nature of circuitry and wiring in the limbic system is built by the child’s repeated life experiences; likewise, trauma or chronic early adversity can do lasting harm to the young child’s developing brain circuitry.
- Babies’ social capacities allow them to take part in reciprocal social exchanges with others, and these exchanges shape how their brains develop and who they will later become.<sup>6</sup>

Dr. McHale also shared the *Still Face Experiment* video, a powerful study which shows our need for connection from very early in life. This experiment was developed by Dr. Ed Tronick, and its findings first shared in 1975 at the biennial meeting of the Society for Research in Child Development. The *Still Face Experiment* points to the importance of early parent-child interactions, and gives insights into how a parent’s reaction can affect the emotional development of their baby.<sup>7</sup>

In September 2020, the JWB Board adopted the *JWB Strategic Plan: FY21 – FY25*, featuring a new key result area for Early Childhood Development, reflecting the critical importance of holistic development of children ages birth to three. Specifically, *Strategic Goal 1: Early Childhood Development* states, “Children, ages zero to three, will meet appropriate physical, social, emotional, cognitive, and developmental milestones”, and *Strategy 1.3* calls for JWB to launch a campaign targeting Pinellas County parents and caregivers of children ages birth to three to help ensure children achieve critical milestones, and that practical application of early childhood education principals are understandable, known, and applied.<sup>8</sup>

In January 2021, JWB’s 7<sup>th</sup> Annual Children’s Summit featured Dr. Dipesh Navsaria, MPH, MSLIS, MD, a pediatrician from the University of Wisconsin School of Medicine and Public Health who presents nationally on early brain and child development, early literacy, and advocacy. His keynote presentation, titled *Early Experiences Elevate Everything: Early Brain and Child Development, and the Future of Society*, validated JWB’s new strategic focus on early childhood development, and how critical the first 1,000 of a child’s life are. It also reinforced the importance of engaging parents and caregivers early to shape the brains and the futures of children.<sup>9</sup>

In his keynote presentation, Dr. Navsaria pointed to a report by the Science of Early Childhood Development: National Scientific Council on the Developing Child that synthesized decades’ worth of research on early brain and child development, and shared its six main points:<sup>10</sup>

- (1) Child development is a foundation for community development and economic development, as capable children become the foundation of a prosperous and sustainable society. Early brain development, or infrastructures of the brains of

children ages birth to three, should be thought about the same way as other infrastructure investments.

- (2) The brain develops over time. While early brain matters given how fast the brain is developing in the first three years of life, the brain continues to grow and develop over time. There is also a chance for recovery of loss of brain development in those early years; however, it takes more time and effort.
- (3) The interactive influences of genetics and experiences literally shapes the architecture of brain development. Early brain development is reliant upon genetic, prenatal, and neuro-development; socio-economic environmental; and attachment and relationship patterns. While you cannot modify genetics, you can shape experiences. The attachment and relationship patterns matter most in early brain development: the back and forth engagement a child has with a nurturing adult. However, these early interactions are not natural, automatic, or instinctual; instead, they are learning or patterned after experiences, and skills' gaps exist. Therefore, parents need both information *and* skills-building through modeling, encouraging, and coaching, teaching and showing them how to interact with their babies. In addition, parents often lack confidence in their capabilities to interact with, talk, or teach their children. They think, "Am I doing this right? What am I supposed to say? I struggled in school; I can't do this." Parents then often turn to educational apps, TV, or DVDs to teach their children. But Dr. Navsaria stressed that there is **no app to replace the lap.**
- (4) Both brain architecture and developing abilities are built "from the bottom up" with simple circuits and skills providing the scaffolding for more advanced circuits and skills over time. This is important, as one skill is built upon another. Play is the work of infancy: play is not just about amusement, it's about development, learning, bonding, and attachment. Therefore, early learning centers are akin to early workforce development programs.
- (5) Toxic stress in early childhood is associated with persistent effects on the nervous system and stress hormone systems that can damage developing brain architecture, and lead to lifelong problems in learning, behavior, and both physical and mental health. The body's automatic stress response is to produce hormones (cortisol and epinephrine). If stress is prolonged, the "fight or flight" response becomes chronic, leading to changes in brain architecture and hyper-responses to stress given a decreased ability to self-calm or cope – a cycle of toxic stress.
- (6) Creating the right conditions for early childhood development is likely to be more effective and less costly than addressing problems at a later age. If we get it right early on, it's way more effective and less costly than addressing later on. For every dollar we put into early childhood development and education, the return on investment ranges from \$4 to \$9. This is based on the life's work and research of James J. Heckman, Nobel laureate and Professor of Economics at the University of Chicago famous for the Heckman Equation.<sup>11</sup>

Dr. Navsaria went on to share that the best solutions:

- Build capabilities of parents through information, skills-building, modeling and coaching
- Build capacities that take advantage of everyday interactions, while addressing barriers or competing priorities parents may have
- Are based in home and communities, meeting families where they are



- Leverage the first 1000 days of a child's life
- Take a prevention approach
- Aim for long-term effects
- Are evidence-guided or evidence-informed
- Are scalable and able to be replicated

In January 2021, JWB convened the 0-3 Think Tank comprised of Pinellas County early childhood development and education experts helping guide and inform JWB's *Strategic Goal 1: Early Childhood Development*, which includes the development, launch, and implementation of an Early Childhood Public Awareness Campaign. The 0-3 Think Tank assisted in conducting environmental scans of similar national, regional, and local campaigns targeting children ages birth to three, and participated in discovery sessions, which resulted in a thematic analysis of foundational themes and ideas aimed at informing the Campaign. The 0-3 Think Tank is positioned to collaborate with the successful firm on the Campaign, serving as content experts, devising/implementing an outreach plan, and assisting with the development of success indicators/metrics. (Refer to 0-3 Think Tank Thematic Analysis – Appendix “A” for the results of the environmental scan and discovery sessions.)

## 2.3 **DEFINITIONS**

- **Branding**: Any number of elements that will help form the Campaign's identity and elicit recognition, response, and action, to include name, tagline, logo, images, color scheme, font styles, etc.
- **Creative Concept**: An overarching big idea that captures audience interest, influences their emotional response and inspires them to take action. It is a unifying theme that can be used across all campaign messages, calls to action, communication channels, and audiences. Typically, the creative concept is embodied in a headline, tagline, and key visuals. Successful creative concepts are distinctive, memorable, unifying, and relevant.
- **Geofencing**: Location-based digital marketing tool that uses GPS or RFID technology to create a virtual geographic boundary, enabling software to trigger a response when a mobile device enters or leaves a particular area and allowing marketers to send messages to smartphone users in that defined geographic area.
- **Informal Caregivers**: Relatives, neighbors, and family friends who are not licensed childcare providers, but are providing short-term care for children either with or without payment for services.
- **Messaging**: Approved set of key points, words, phrases, or messages used to communicate a concept, idea, or information with a target audience.
- **Microsite**: A small cluster of web pages meant to function as a discrete entity and to complement an activity or campaign, and to have its own domain name; on average, a microsite is ten (10) pages or less.
- **Parentese**: Fully grammatical speech that involves real words, elongated vowels, exaggerated tones of voice, higher pitches, and slower tempos spoken directly to babies to engage and invite them to respond, and differentiated from merely imitating or repeating back a babies' babbling or cooing sounds. Also referred to as baby talk, caretaker speech, infant-directed speech (IDS), child-directed speech (CDS), child-directed language (CDL), caregiver register, or motherese.

- PSA: Acronym for public service announcement, a message in the public interest disseminated by the media without charge aimed at raising public awareness and changing behavior.
- Visuals: Any number of visual elements that will help form the Campaign's identity and elicit recognition, response, and action, to include graphics, illustrations, images (stock or original), artwork, designs, creatives, photographs, or other non-textual material.

## **2.4 TARGET AUDIENCES**

The Campaign will focus on adults who are raising or caring for Pinellas County children, ages birth to three, with the following target audiences:

- Parent(s), especially young parents and fathers
- Caregiver(s), especially grandparents
- Informal caregivers
- Diverse populations, including but not limited to African-American, Hispanic/Latinx, English as a second language, and families of lower socio-economic status.

## **2.5 QUALIFICATIONS**

Qualifications for the successful Proposer include:

- Demonstrated success in developing and launching public service campaigns similar in scope, scale, and complexity.
- Demonstrated experience working with governmental, nonprofit, or human services organizations on campaigns or other relevant projects.
- Demonstrated experience conducting, analyzing, and interpreting market research, both primary research (i.e. focus groups, surveys, questionnaires, interviews, etc.) and secondary research (i.e. public sources, educational institutions, etc.) to create effective messaging and visuals to targeted audiences in various demographic groups.
- Demonstrated knowledge and experience in developing and launching websites/microsites.
- Demonstrated knowledge and experience in developing and implementing successful media/marketing strategies, to include digital, offline, paid, and earned strategies.
- Seasoned project team with staff assigned to the project who have demonstrated knowledge and experience to execute the objectives and deliverables.
- Demonstrated ability to meet deadlines with high-quality products and materials.

## **2.6 OBJECTIVES, DELIVERABLES, AND TIMELINE**

The Campaign goal is to create awareness in parents and caregivers to children, ages birth to three, of critical developmental milestones, and how to promote healthy interactions between the parent/caregiver and child in the first three years of life, taking advantage of everyday opportunities to educate and build baby's brain. This is to be done through the achievement

of the following objectives.

The Campaign project is intended to span a four year period to align with the JWB Strategic Plan: FY21 – FY25. The year one budget for FY22 (October 1, 2021-September 30, 2022) for the Campaign is \$125,000. This includes the development of the Campaign (which is covered under the scope of this RFP) and the launch of the Campaign which includes, but is not limited to, media buys, collaterals, and parent/caregiver education toolkits. For subsequent years of the Campaign, we anticipate an incremental increase in the budget as we expand our reach and capacity, and implement the success measurement plan.

#### **A. Objectives and Deliverables**

<b>OBJECTIVE #1. Project Kick-Off Phase:</b> Refine and finalize the project work plan which includes the communications plan, concept testing plan, success measurement plan, and project schedule.	
<b>DELIVERABLE #1.1.</b> Final project work plan, including the communications plan, concept testing plan, success measurement plan, and project schedule, Approved by JWB (Document).	
<b>Proposer Responsibilities:</b>	<b>JWB Responsibilities:</b>
<ul style="list-style-type: none"><li>• Provide lead for project.</li><li>• Schedule and facilitate kick-off meeting between firm's Key Project Staff and JWB Staff. Purpose of meeting is to jointly review and refine the project work plan which outlines the approach to be taken to meet the objectives/deliverables, and includes the communications plan, concept testing plan, success measurement plan, and project schedule. Meeting must take place within five (5) business days of the effective date of the contract. Anticipate meeting will be in-person at: Juvenile Welfare Board, 14155 58<sup>th</sup> Street North, Clearwater, FL 33760 (virtual Teams/Zoom meeting may replace in-person due to COVID).</li><li>• The <b>communications plan</b> to include frequency of routine project planning meetings and discovery work sessions between the firm and JWB and project management communication tools to be used. Meetings/work sessions may be in-person, virtual, conference calls, or any combination thereof.</li><li>• The <b>concept testing plan</b> to include strategies for testing the effectiveness of creative concepts with target audiences (i.e. focus groups, surveys, questionnaires, interviews, etc.)</li></ul>	<ul style="list-style-type: none"><li>• Provide lead for project (JWB Strategic Communications Manager to serve as Project Lead).</li><li>• Identify and assign other JWB Staff to project.</li><li>• Provide meeting space at the Juvenile Welfare Board offices located at 14155 58<sup>th</sup> Street North, Clearwater, FL 33760.</li><li>• Provide virtual Teams meeting platform, as deemed necessary.</li><li>• JWB, in its sole discretion must approve and accept the deliverable. A deliverable submitted but not approved and rejected by JWB must be re-submitted in a time period determined by JWB.</li></ul>

<ul style="list-style-type: none"> <li>• The <b>success measurement plan</b> to include key performance indicators/ metrics to measure the Campaign’s reach and results. At minimum, plan should outline a process to collect, track, monitor, and analyze data on a routine basis, consider any applicable pre- and post-performance measures, and note any other considerations (i.e. data tracking or analytics software).</li> <li>• The <b>project schedule</b> to align with the timeline and ensure deliverables are met.</li> <li>• Make revisions and finalize project work plan based on feedback from JWB project Lead.</li> <li>• Deliverable due within fifteen (15) business days after kick-off meeting.</li> </ul>	
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<b>OBJECTIVE #2. Idea Creation &amp; Creative Concept Phase:</b> Develop and finalize ideas and creative concepts for unified messaging and branded visuals for the Campaign.	
<b>DELIVERABLE #2.1.</b> Early Childhood Public Awareness Campaign creative concept report Approved by JWB. (Document).	
<b>Proposer Responsibilities:</b>	<b>JWB Responsibilities:</b>
<ul style="list-style-type: none"> <li>• Schedule, facilitate, and document discovery work sessions between the firm and JWB/0-3 Think Tank so that the firm fully understands the principles of early brain and child development, and early childhood education, and to review/discuss the 0-3 Think Tank Thematic Analysis, which includes foundational themes, concepts, and environmental scans to inform the Campaign. Discovery work sessions may be in person at the JWB or firm’s office, or held virtually, per communications plan.</li> <li>• Information gleaned from discovery work sessions, and from 0-3 Think Tank Thematic Analysis and environmental scans, are to be incorporated into the creative concept report.</li> <li>• Creative concept report to include a set of refined messaging and branded visuals with descriptions expanding the meaning of each.</li> </ul>	<ul style="list-style-type: none"> <li>• Provide copy of the 0-3 Think Tank Thematic Analysis, which includes foundational themes, concepts, and environmental scans to help inform the Campaign, and attend discovery work sessions to review/discuss with the firm, and answer questions.</li> <li>• Identify and invite JWB staff and/or 0-3 Think Tank members to discovery work sessions to serve as subject matter/content experts to verbally explain and answer questions related to the principles of early brain and child development, early childhood education., and information outlined in the 0-3 Think Tank Thematic Analysis.</li> <li>• Provide meeting space at the Juvenile Welfare Board offices located at 14155 58<sup>th</sup> Street North, Clearwater, FL 33760, or virtual Teams meeting platform, as deemed necessary.</li> <li>• JWB, in its sole discretion must approve and accept the deliverable. A deliverable</li> </ul>

<ul style="list-style-type: none"> <li>• Creative concept report to include overarching concepts for parents and caregivers of children, ages birth to three, with subthemes for target audience: young parents, fathers, grandparents, informal caregivers, and diverse populations.</li> <li>• Deliverable timeframe to be included in the project schedule.</li> </ul>	submitted but not approved and rejected by JWB must be re-submitted in a time period determined by JWB.
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**OBJECTIVE #3. Creative Concept Testing Phase.** Test concepts for unified messaging and branded visuals for Campaign effectiveness with target audiences.

**DELIVERABLE #3.1.** Concept testing report Approved by JWB (Document).

<b>Proposer Responsibilities:</b>	<b>JWB Responsibilities:</b>
<ul style="list-style-type: none"> <li>• Conduct formative research on the effectiveness of creative concepts with target audiences using testing methods outlined in the project work plan (i.e. focus groups, surveys, questionnaires, interviews, etc.).</li> <li>• Ensure research and testing is performed with parents and caregivers of children, ages birth to three, that include representation from target audiences: young parents, fathers, grandparents, informal caregivers, and diverse populations; ensure diversity in terms of socio-economic, geographic location, and ethnicity; and include both English and Spanish-only speaking participants. (Refer to Section 2.4 Target Audiences).</li> <li>• Concept testing may take place in-person, at the JWB office or a Pinellas County community site, be held virtually or via telephone, or online.</li> <li>• Collaborate with JWB and 0-3 Think Tank for assistance in identifying participants for focus groups or other testing methods, per project work plan.</li> <li>• Compile, analyze, and interpret creative concept testing results into a report which will be used to develop the Campaign.</li> <li>• Deliverable timeframe to be included in the project schedule.</li> </ul>	<ul style="list-style-type: none"> <li>• Collaborate with firm to assist in identifying participants for focus groups/other testing methods, per project work plan.</li> <li>• Provide an interpreter for all Spanish-only speaking participants, per project work plan.</li> <li>• Provide meeting space at the Juvenile Welfare Board offices located at 14155 58<sup>th</sup> Street North, Clearwater, FL 33760, or virtual Teams meeting platform, as deemed necessary.</li> <li>• Assist in locating Pinellas County community sites for testing, as deemed necessary.</li> <li>• JWB, in its sole discretion must approve and accept the deliverable. A deliverable submitted but not approved and rejected by JWB must be re-submitted in a time period determined by JWB.</li> </ul>

<b>OBJECTIVE #4. Campaign Development Phase.</b> Conceptualize, develop, refine, and produce unified messaging and branded visuals for the Campaign, and related toolkits, collaterals, microsite, and cost effective media/marketing plan.	
<b>DELIVERABLE #4.1.</b> Final Approved Campaign to include key messaging and branded visuals (Document)	
<b>Proposer Responsibilities:</b>	<b>JWB Responsibilities:</b>
<ul style="list-style-type: none"> <li>• Schedule, facilitate, and document presentation meeting with JWB and 0-3 Think Tank. Meeting may take place in-person at JWB office, or virtually via Teams/Zoom.</li> <li>• Outline the approach taken, initial concept, and focus group concept testing results. Present three (3) campaign concepts that include overarching for broad audience and subthemes for target audiences, and provide brief descriptions expanding the meaning for each. Presentation may include PPT slides, concept boards, and sample collaterals, toolkits, or media/marketing materials.</li> <li>• Present firm's top recommendation and rationale, and employ strategy for consensus-building (i.e. voting, surveying, ranking, etc.).</li> <li>• Collect and synthesize feedback from meeting into final campaign.</li> <li>• Deliverable timeframe to be included in the project schedule.</li> </ul>	<ul style="list-style-type: none"> <li>• Identify and invite JWB Staff and/or 0-3 Think Tank members to attend Campaign development presentation meeting.</li> <li>• Provide meeting space at the Juvenile Welfare Board offices located at 14155 58<sup>th</sup> Street North, Clearwater, FL 33760, or virtual Teams meeting platform, as deemed necessary.</li> <li>• JWB, in its sole discretion must approve and accept the deliverable. A deliverable submitted but not approved and rejected by JWB must be re-submitted in a time period determined by JWB.</li> </ul>
<b>DELIVERABLE #4.2.</b> Presentation of Campaign to JWB Board at Monthly Meeting on July 14, 2022 (PPT Presentation, Talking Points, and Concept Boards)	
<b>Proposer Responsibilities:</b>	<b>JWB Responsibilities:</b>
<ul style="list-style-type: none"> <li>• Collaborate with JWB Project Lead to create a presentation of the final approved Campaign to include key messaging and branded visuals to the JWB Board. Presentation to include but not limited to: overview of approach, concept testing key findings, and iterative process used to select/finalize Campaign with JWB and 0-3 Think Tank; key messaging, branded visuals, and subthemes for target audiences; sample visuals of key deliverables; and overview of the success measurement plan.</li> <li>• Presentation to be made by firm's key project staff and JWB Project Lead.</li> </ul>	<ul style="list-style-type: none"> <li>• Collaborate with firm to create a presentation to the JWB Board for their approval.</li> <li>• JWB Project Lead to co-present with firm's key project staff.</li> <li>• Accept and approve final JWB Board Meeting presentation (PPT slides, talking points, and concept boards) and submit for distribution/posting per JWB's internal procedures.</li> <li>• Draft and submit related Board Memo for distribution/posting per JWB's internal procedures.</li> <li>• Set-up easels in JWB Board Conference Room to display concept boards.</li> </ul>

<ul style="list-style-type: none"> <li>• Submission and final acceptance of the presentation materials (PPT slides, talking points, and concept boards) are due to JWB Project Lead no later than ten (10) business days prior to the JWB Board Meeting (July 14, 2022).</li> <li>• Attend JWB Board Meeting on July 14, 2022 from 9:00 – 11:00 AM to present the new Early Childhood Public Awareness Campaign. The firm’s key personnel should arrive at 8:30 AM at: Juvenile Welfare Board, 14155 58<sup>th</sup> Street North, Clearwater, FL 33760 (Deliverable date).</li> </ul>	<ul style="list-style-type: none"> <li>• JWB, in its sole discretion must approve and accept the deliverable. A deliverable submitted but not approved and rejected by JWB must be re-submitted in a time period determined by JWB.</li> </ul>
<b>DELIVERABLE #4.3.</b> Campaign Guide/Toolkit for Partners Approved by JWB (Document)	
<b>Proposer Responsibilities:</b>	<b>JWB Responsibilities:</b>
<ul style="list-style-type: none"> <li>• Develop campaign guide/toolkit to be used as a how-to guide for organizational and individual participation that includes key messaging, brand guidelines, and social media toolkit.</li> <li>• Campaign guide/toolkit to be used by JWB, 0-3 Think Tank and other campaign partners; it may include but not be limited to Campaign name, tagline, key messaging, branded visuals or logos, branded color scheme, font types, microsite URL, and social media toolkit (i.e. graphics, sample posts, and hashtags).</li> <li>• Deliverable timeframe to be included in the project schedule.</li> </ul>	<ul style="list-style-type: none"> <li>• JWB Staff to review for edits and provide feedback; JWB Project Lead to determine when document is final/approved.</li> <li>• JWB, in its sole discretion must approve and accept the deliverable. A deliverable submitted but not approved and rejected by JWB must be re-submitted in a time period determined by JWB.</li> </ul>
<b>DELIVERABLE #4.4.</b> Develop and launch Campaign microsite Approved by JWB (microsite URL)	
<b>Proposer Responsibilities:</b>	<b>JWB Responsibilities:</b>
<ul style="list-style-type: none"> <li>• Create a microsite that is branded to, supports, and serves as a call-to-action for the Campaign. Sitemap to include but not limited to web page templates for home, parent resources/ tips, partners, and contact/join.</li> <li>• Provide graphic design, copy-writing, editing, and related services needed for a diverse set of content including, but not limited to, video and digital assets. Content shall be designed to optimize the user’s experience across web</li> </ul>	<ul style="list-style-type: none"> <li>• Purchase, register, and secure recommended URL domain name.</li> <li>• Coordinate and provide website hosting services with current web hosting vendor (Pantheon).</li> <li>• Responsible for all work and costs related to ongoing content management (WordPress or other approved platform), web hosting, and web maintenance once microsite is launched.</li> </ul>

<p>platforms, including the growing number of mobile/device users.</p> <ul style="list-style-type: none"> <li>• Collaborate with JWB Staff on page content.</li> <li>• Research availability of and recommend a URL domain name.</li> <li>• Preference is for Word Press as the open-source content management system used for the microsite (if another system is recommended, JWB Project Lead must approve).</li> <li>• Schedule and facilitate website audit/testing for content and functionality, in collaboration with JWB.</li> <li>• Deliverable timeframe to be included in project schedule.</li> </ul>	<ul style="list-style-type: none"> <li>• Provide webpage copywriting and editing via in-house communications staff.</li> <li>• Provide video production/ editing via in-house multi-media producer for collaborative video projects, as needed.</li> <li>• Provide basic graphic design via in-house communications staff for collaborative graphic projects, as needed.</li> <li>• Provide staff to assist with microsite page audit and testing prior to launch.</li> <li>• JWB, in its sole discretion must approve and accept the deliverable. A deliverable submitted but not approved and rejected by JWB must be re-submitted in a time period determined by JWB.</li> </ul>
<b>DELIVERABLE #4.5.</b> Develop parent/caregiver education toolkits and other collaterals Approved by JWB. (Artwork files)	
<b>Proposer Responsibilities:</b>	<b>JWB Responsibilities:</b>
<ul style="list-style-type: none"> <li>• Work collaboratively with JWB to create unique and practical items for parent/caregiver education toolkits, as well as other collaterals to promote the Campaign’s unified messaging and branded visuals, and taking into consideration target audiences and subthemes.</li> <li>• Examples of items for the parent/caregiver educational toolkits include but are not limited to flashcards, calendars, educational toys/bath time toys, books, and more. Examples of collaterals include rack cards, postcards, brochures, check lists, and more.</li> <li>• Create toolkit/collateral materials in both English and Spanish.</li> <li>• Deliverable timeframe to be included in project schedule</li> <li>• NOTE: Proposer is responsible for recommending cost-effective toolkits and other collaterals that are within the total project budget, but is not responsible for the actual purchase.</li> </ul>	<ul style="list-style-type: none"> <li>• Purchase parent/caregiver education toolkits and other collaterals for Campaign launch from total project budget.</li> <li>• Purchase licenses for royalty-free stock images for the Campaign from a separate budget.</li> <li>• Provide copywriting and editing via in-house communications staff, as needed.</li> <li>• Provide Spanish translation of Campaign materials via in-house certified translator.</li> <li>• Provide video production/ editing via in-house multi-media producer for collaborative video projects, as needed.</li> <li>• Provide basic graphic design via in-house communications staff for collaborative graphic projects, as needed.</li> <li>• JWB Project Lead to determine when collaterals or artwork files are final/approved.</li> <li>• JWB, in its sole discretion must approve and accept the deliverable. A deliverable submitted but not approved and rejected by JWB must be re-submitted in a time period determined by JWB.</li> </ul>
<b>DELIVERABLE #4.6.</b> Develop a cost-effective media/marketing plan Approved by JWB. (Document and/or artwork files).	
<b>Proposer Responsibilities:</b>	<b>JWB Responsibilities:</b>



<ul style="list-style-type: none"> <li>• Collaborate with JWB to develop a cost-effective media/marketing plan to reach target audiences through an array of digital, offline, paid, and earned strategies (i.e. social media, website/app, geofencing, videos, email campaigns, TV/radio PSAs, print/digital/out-of-home advertising, press releases, etc.).</li> <li>• Make recommendations to JWB as to the development of artwork, TV/radio spots, video, ad's, etc. to support key media/marketing strategies for launch and subsequent Campaign years.</li> <li>• Deliverable timeframe to be included in project schedule.</li> </ul>	<ul style="list-style-type: none"> <li>• Purchase media buys for Campaign launch from total project budget.</li> <li>• Purchase licenses for royalty-free stock images for the Campaign from a separate budget.</li> <li>• Provide copywriting and editing via in-house communications staff, as needed.</li> <li>• Provide Spanish translation of Campaign materials via in-house certified translator.</li> <li>• Provide video production/ editing via in-house multi-media producer for collaborative video projects, as needed.</li> <li>• Provide basic graphic design via in-house communications staff for collaborative graphic projects, as needed.</li> <li>• JWB Project Lead to determine when plan and/or artwork files are final/approved.</li> <li>• JWB, in its sole discretion must approve and accept the deliverable. A deliverable submitted but not approved and rejected by JWB must be re-submitted in a time period determined by JWB.</li> </ul>
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<b>OBJECTIVE #5. Campaign Launch Phase.</b> Launch and promote the Early Childhood Public Awareness Campaign.	
<b>DELIVERABLE #5.1.</b> Campaign launch plan Approved by JWB (Document)	
<b>Proposer Responsibilities:</b>	<b>JWB Responsibilities:</b>
<ul style="list-style-type: none"> <li>• Collaborate with JWB and 0-3 Think Tank to develop and implement a Campaign launch plan.</li> <li>• Launch plan to include, but not limited to, proposed activities, promotions, communications, and schedule related to the roll-out of the Campaign.</li> </ul>	<ul style="list-style-type: none"> <li>• Collaborate with firm to develop and implement a Campaign launch plan.</li> <li>• Assist firm with implementing the Campaign launch.</li> <li>• JWB, in its sole discretion must approve and accept the deliverable. A deliverable submitted but not approved and rejected by JWB must be re-submitted in a time period determined by JWB.</li> </ul>

## **B. Additional Services**

Additional services may be requested of the successful Proposer after the Campaign launch (initial agreement term) to refine, enhance and/or add new work products to the Campaign (i.e. collaterals, PSAs, media buys, etc.), and to collaborate with JWB on implementing the success measurement plan.

## **C. Anticipated Campaign Timeline**

Proposers are required to submit a project schedule with estimated dates and milestones, as part of their project work plan, for all activities outlined in the RFP's scope of work. In

developing the project schedule, Proposers should keep in mind the following:

- JWB anticipates contracting with the successful firm on February 17, 2022 and launching the Early Childhood Public Awareness Campaign in late August 2022.
- The successful firm and JWB Project Lead will present the Campaign to the JWB Board at their monthly meeting on July 14, 2022. The successful firm must provide all final presentation materials at least 10 business days prior to the July Board Meeting (Deliverable #4.2).

## **2.7 SERVICE AGREEMENT TERMS AND CONDITIONS**

The successful Proposer will be required to execute the attached Services Agreement provided in Attachment 1. Proposer is advised that exceptions to any of the terms contained in Attachment 1 must be identified in its response to the RFP. Absence of Proposer's exceptions to the contractual terms or any portion thereof shall be deemed an acceptance of the same. Proposer's desire to take exception to a term will not disqualify it from consideration for award. Exceptions may be considered in the selection process, and may be included in the final contract between JWB and the Proposer.

## **2.8 INSURANCE**

The Proposer must provide a certificate of insurance in accordance with the insurance requirements listed in Attachment 1 prior to entering into a formal contract. Failure to provide the required insurance within a ten (10) day period following the award may result in vacating the original determination or recommendation and proceeding with recommendation to the next ranked Proposer.

### **3.0 PROPOSAL REQUIREMENTS**

This section includes the following forms which must be submitted in the Proposal in the order and as directed in section 1.11, Proposal Submission, of this RFP. Form 2 – Cost Proposal.xlsx is provided as a separate document from this RFP document.

#### **3.1 FORM 1 – PROPOSAL SIGNATURE FORM**

#### **3.2 FORM 2– COST PROPOSAL**

Proposers must complete and submit in the original, unaltered format the cost proposal that is provided as Form 2 – Cost Proposal.xlsx.

Proposer will perform the Scope of Work in a phased approach based on each Objective (referenced in 2.6). All Proposals must provide the total price of completing all of the Objectives of this project via Form 2. Proposer must provide firm and fixed pricing. Payments will be made based upon JWB’s acceptance of deliverables. The quoted price is to be the price for all resources by the Proposer both anticipated and unanticipated. If applicable, all travel, lodging & per diem expenses are to be incorporated within the applicable deliverable and included in the project price. The Cost Proposal shall be in a form that can be incorporated into the resulting Agreement as the Fee Schedule.

Proposers are not responsible for the actual purchase costs of any type of media materials and those will not be included in the contract award amount.

Additional Services: JWB will pay the successful Proposer an hourly rate for work done over/above the Scope of Work Deliverables of the Campaign, as notated on Form 2. This may occur within the six (6) month contractual period, or in any of the three (3) optional one-year renewal periods, for reasons that include but are not limited to: Campaign refinement, enhancing or refining of collaterals, and/or addition of new work products aligned with the Campaign’s media/marketing plan.

Value Added Services: JWB may consider a range of options, amenities and enhancement features (“Value-Added Services”) offered by a Proposer when awarding the Agreement. It shall be within JWB’s sole discretion whether the added value offered in respect thereof justifies any additional expenditure. While JWB shall not be obligated to consider Value Added Services, no Value Added Services will be considered by JWB unless the Proposer’s submission fully complies with the RFP in all respects. For Value Added Services to be considered, they must be included in Form 2-Cost Proposal in the appropriate section.

#### **3.3 NARRATIVE RESPONSE**

- Provide a narrative response addressing the information requested in table below, and provide in the following format using 8 1/2” x 11” white paper, typed single-spaced 12-point font, 1/2-inch margins.
- Please title each section (A., B., C., etc.), and respond to each bullet in each section, even if some appear repetitious.

- All pages should be appropriately numbered and identified by the complete company name in the header and/or footer.
- Attachments such as photos, drawings and maps showing the proposed area and site in the context of its surroundings are encouraged to be included.
- Respond to each of the following questions in your narrative response:

**A. Firm Overview, Qualifications, and Experience**

1. Provide an overview of the Proposer's firm, including number of employees, years in business, and physical office address of each office location. Notate the office location from which the work for this project will be performed.
2. Describe the firm's qualifications relevant to JWB's needs and scope of work (Refer to Section 2.5 Qualifications). Include qualifications and experience developing and launching similar public awareness campaigns; conducting market research; developing and launching websites/microsites; creating and implementing a media/marketing plan; and measuring success of similar public awareness campaigns.
3. Provide three (3) examples of recent campaigns similar in scope, scale, and complexity. Include brief descriptions, success metrics, and work samples for each. Note whether the campaigns were successful and why/why not.
4. Describe the firm's experience working with clientele from government, nonprofit, or human services organizations, on similar campaigns or relevant projects.
5. Identify any outsourced work and/or subcontractors that will be assigned to this project by company name, address, contact person, telephone number, and project function. Describe Proposer's experience working with each subcontractor.
6. Describe the firm's commitment to staff continuity for personnel assigned to this project.

**B. Key Project Personnel**

1. Provide a list of key project personnel, their experience relevant to this project, areas of expertise, years of experience with the firm/in the field, and attach resume or LinkedIn profile. Include a brief description of their roles/responsibilities with this project.
2. Identify who will serve as "Project Manager" from the list of key project personnel and describe if there is a project manager change during the term of the Agreement, how the transition will be handled.

**C. Understanding, Approach, and Project Work Plan**

1. Provide a narrative that demonstrates the firm has a clear understanding of the overall Campaign vision, goal, scope of work, and project budget, noting any specific challenges that may exist.
2. Provide narrative as to the approach the firm will take related to implementing the scope of work, to include its objectives and deliverables, while adhering to the timeline and project budget. While Proposers are not responsible for the actual purchase costs of toolkits, collaterals, or media buys, they must take into consideration the total Campaign budget for FY22.
3. Provide a detailed project work plan, to include a communications plan, concept testing plan, success measurement plan, and project schedule. Include proposed frequency of meetings, how/where meetings will be conducted, general communications, and project management software, as applicable and all assumptions, including assumptions regarding the approval process between firm

and JWB. Note steps to be taken to enhance accessibility and minimize potential problems.

4. Provide a narrative that outlines how the firm intends to collaborate with JWB and its 0-3 Think Tank on the Campaign.
5. Attach a draft of a Statement of Work that enumerates and defines the work/services that Proposer will provide to JWB to complete the Services in this RFP, including each task and Deliverable. The Proposer's Statement of Work shall be in a form that can be incorporated into the resulting Agreement at JWB's option.
6. If proposing Value Added Services, please describe the value-added services and what the benefits of adding these services would be to the campaign?

### **3.4 FORM 3 – NON-COLLUSION AFFIDAVIT**

### **3.5 FORM 4– REFERENCES**

Provide a minimum of three references from entities of similar size (preferably government) that launched campaigns similar in scope, scale, and complexity.

### **3.6 FORM 5– SERVICE AGREEMENT TERMS & CONDITIONS COMPLIANCE CHECKLIST**

Proposers must complete and submit in the original, unaltered format the Service Agreement Terms & Conditions Compliance form, provided as Form 5.

### **3.7 FORM 6– IRS W-9**

A current W-9 form must be completed and signed and submitted with the Proposal.

## FORM 1 – PROPOSAL SIGNATURE FORM

Company Name: \_\_\_\_\_ D/B/A: \_\_\_\_\_

Telephone Number: \_\_\_\_\_ Fax: \_\_\_\_\_

Company's Website Address: \_\_\_\_\_

Tax ID number (EIN/SSN): \_\_\_\_\_

E-Verify number: \_\_\_\_\_

Type of Entity: ☐ Individual or Sole Proprietorship ☐ Partnership ☐ Limited Liability Company ☐ Corporation ☐ Not-for-Profit ☐ Unit of Government (*mark appropriate box*)

Licensed to do business in Florida? ☐ Yes ☐ No ☐ N/A

Mailing Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ ZIP Code: \_\_\_\_\_

Contact Name and Title: \_\_\_\_\_

Contact Telephone Number: \_\_\_\_\_ Contact Email Address: \_\_\_\_\_

The undersigned, as authorized Proposal responder, declares that he/she has carefully examined all requirements herein and that he/she fully understands the requirements of the same.

The undersigned further agrees that the information provided in this Proposal is true and correct and agrees to perform such services in the manner described and subject to the terms and conditions set forth in the Proposal or as mutually agreed upon by subsequent negotiation.

**SIGNATURE:** \_\_\_\_\_ **DATE:** \_\_\_\_\_

*Please sign in blue ink.*

**PRINT NAME/TITLE:** \_\_\_\_\_

### FORM 3 - NON-COLLUSION AFFIDAVIT

**This Affidavit set forth below must be executed on behalf of the vendor and furnished with every Proposal.**

\_\_\_\_\_, being dully sworn, deposes he/she is the \_\_\_\_\_ of \_\_\_\_\_, a Vendor that has submitted to JWB a proposal for a/an \_\_\_\_\_, as fully set forth in said proposal and that, except as specified below, the aforementioned Vendor constitutes the only person, firm, or corporation having any interest in said proposal or in any contract, benefit, or profit which may, might or could accrue as a result of said proposal, said exceptions being as follows:

\_\_\_\_\_.

Vendor further states that said proposal is, in all respects, fair and is submitted without collusion or fraud; and that no member of JWB is directly or indirectly interested in said proposal.

Vendor certifies that to the best of their knowledge and belief: 1) the prices in the proposal have been arrived at independently without collusion, consultation, communication, or agreement, for the purpose of restricting competition, as to any matter relating to such prices with any other competitor; and 2) no attempt has been made or will be made by the proposer to induce any other person, partnership or corporation to submit or not to submit a proposal for the purpose of restricting competition.

\_\_\_\_\_

(Affiant)

SWORN TO and subscribed before me, a Notary Public, in and for the below named State and City this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_.

\_\_\_\_\_

(Notary Public)

\_\_\_\_\_

City

\_\_\_\_\_

State

## FORM 4 – REFERENCES

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

Provide at least three (3) references for customers for whom you have performed similar services. All references will be contacted by a JWB designee via email or phone to obtain answers to questions, as applicable before an evaluation decision is made.

**Reference 1:**

Entity Name	
Service Provided	
Project Completion Date	
City, State	
Contact Person	
Contact Title	
Contact Phone	
Contact E-mail	

**Reference 2:**

Entity Name	
Service Provided	
Project Completion Date	
City, State	
Contact Person	
Contact Title	
Contact Phone	
Contact E-mail	



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

**Reference 3:**

Entity Name	
Service Provided	
Project Completion Date	
City, State	
Contact Person	
Contact Title	
Contact Phone	
Contact E-mail	

**Reference 4:**

Entity Name	
Service Provided	
Project Completion Date	
City, State	
Contact Person	
Contact Title	
Contact Phone	
Contact E-mail	

**Reference 5:**

Entity Name	
Service Provided	
Project Completion Date	
City, State	
Contact Person	
Contact Title	

Contact Phone	
Contact E-mail	

## FORM 5 - SERVICE AGREEMENT TERMS & CONDITIONS COMPLIANCE CHECKLIST

Proposers are to mark the Comply, Exception, or Not Comply column for each Minimal Term and Condition in Attachment 1. *Comply* indicates the Proposer understands and agrees to comply fully. *Exceptions* must be fully explained below.

#	Title	Comply	Exception	Not Comply
I	Purpose			
II	Staff			
III	Services			
IV	Payment Terms			
V	Rates for Additional Professional Services			
VI	Method of Payment			
VII	Termination			
VIII-1	Intellectual Property			
VIII-2	Acceptance and Rejection			
1	Agreement Revisions			
2	Governing Law/Venue/Dispute Resolution			
3	Waiver			
4	Communications			
5	Assignments and Subcontracts			
6	Confidential Information			
7	Public Records			
8	Return of Funds			
9	Special Situations and Incidents			
10	Compliance with all applicable laws			
11	Conflict of Interest			
12	Public Entity Crimes			
13	Certification that Contractor is legally able to contract with JWB			
14	Insurance, Public Liability, Bodily Injury, and Property Damage			
15	Indemnification			
16	Everify			

For all items marked as “Exception”, Proposer must list the Exception by number and title and fully explain the exception below:

The undersigned declares that they have read and responded above to all of the Service Agreement terms and conditions. The undersigned also acknowledges that for JWB to consider any exceptions whatsoever to its terms, it must be marked off and explained on the response to the RFP. JWB will, in its sole discretion consider the exceptions but reserves the right to reject all exceptions. Exceptions raised after the submission of the response to the RFP will not be considered by JWB.

**AUTHORIZED SIGNATURE:** \_\_\_\_\_ **DATE:** \_\_\_\_\_

**PRINT NAME/TITLE:** \_\_\_\_\_

# FORM 6 – IRS W-9

Form **W-9**  
(Rev. October 2018)  
Department of the Treasury  
Internal Revenue Service

## Request for Taxpayer Identification Number and Certification

► Go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9) for instructions and the latest information.

Give Form to the  
requester. Do not  
send to the IRS.

Print or type.  
See Specific Instructions on page 3.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.

2 Business name/disregarded entity name, if different from above

3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only **one** of the following seven boxes.

☐ Individual/sole proprietor or single-member LLC ☐ C Corporation ☐ S Corporation ☐ Partnership ☐ Trust/estate

☐ Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ► \_\_\_\_\_

**Note:** Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is **not** disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.

☐ Other (see instructions) ► \_\_\_\_\_

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

Exempt payee code (if any) \_\_\_\_\_

Exemption from FATCA reporting code (if any) \_\_\_\_\_

(Applies to accounts maintained outside the U.S.)

5 Address (number, street, and apt. or suite no.) See instructions.

Requester's name and address (optional)

6 City, state, and ZIP code

7 List account number(s) here (optional)

### Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

**Note:** If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number

\_\_\_\_ - \_\_\_\_ - \_\_\_\_\_

or

Employer identification number

\_\_\_\_ - \_\_\_\_\_

### Part II Certification

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

**Certification instructions.** You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign  
Here

Signature of  
U.S. person ► \_\_\_\_\_

Date ► \_\_\_\_\_

### General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

**Future developments.** For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9).

### Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See *What is backup withholding*, later.

Cat. No. 10231X

Form **W-9** (Rev. 10-2018)

## APPENDIX A - 0-3 Think Tank Thematic Analysis



### JWB Early Childhood Public Awareness Campaign

#### 0-3 Think Tank Thematic Analysis

In January 2021, JWB staff took initial steps towards the development and launch of a campaign that will target Pinellas County parents and caregivers of children, ages birth to three, to help ensure they achieve critical milestones, and that practical application of early childhood education principles are understandable, known, and applied. This is Strategy 1.3, as outlined in the JWB Strategic Plan FY2021 – FY2025.

#### 0-3 THINK TANK

The members of the 0-3 Think Tank have been positioned as subject matter experts to help inform and advise the campaign, along with other key community stakeholders. It was determined that the 0-3 Think Tank's Strategies and Implementation Subgroup would serve as the advisory arm of the campaign. The Think Tank and its Strategies and Implementation Subgroup will continue to serve in an advisory capacity for the creation and launch of the campaign; it will be assessed and determined later as to whether a separate advisory group should be formed to help champion the campaign and serve as a feedback loop to recommend potential changes, as deemed necessary.

#### ENVIRONMENTAL SCANS

Environmental scans were conducted on similar national, regional, and local campaigns early childhood campaigns and resources targeting parents and caregivers of children birth to three. While they vary in size, scope, and design, they are all inspired by the fact that 80% of brain growth happens in the first three years of life. Below is a table featuring results of the environmental scan:

Campaign/Resource	Website	About
Ages and Stages	<a href="http://www.agesandstages.com">www.agesandstages.com</a>	Ages & Stages Questionnaires® (ASQs) provide reliable, accurate developmental and social-emotional screening for children between birth and age six. Drawing on parents' expert knowledge, ASQ® has been specifically designed to pinpoint developmental progress and catch delays in young children, paving the way for meaningful next steps in learning, intervention, and monitoring.
Boston Basics	<a href="http://www.boston.thebasics.org">www.boston.thebasics.org</a>	Boston Basics Campaign is inspired by the fact that 80% of brain growth happens in the first three years

		of life. The Basics are five evidence-based parenting and caregiving principles that encompass much of what experts find is important for children from birth to age three that every child from every background can benefit from routinely experiencing. The five Basics range from talking, singing, and pointing, to counting, grouping, and comparing, to reading and discussing stories.
Centers for Disease Control	<a href="http://www.cdc.gov/ncbddd/actearl/y/milestones/milestones-3yr.html">www.cdc.gov/ncbddd/actearl/y/milestones/milestones-3yr.html</a>	Developmental milestones are things most children can do by a certain age. The CDC has created a checklist of milestones children should reach by the end of their first three years of life, plus a Milestone Tracker mobile app.
Children's Movement of Florida	<a href="http://www.childrensmovementflorida.org">www.childrensmovementflorida.org</a>	The Children's Movement is a nonprofit, nonpartisan movement of Floridians insisting on a strong start for all Florida children, advocating for high-quality early learning opportunities, access to children's health care, and parent support programs in Florida. Their focus is on health, education, and parent support, and their campaigns target early brain and child development, to include: <a href="#">#TeachableMoments</a> ; <a href="#">Brain Building</a> ; and <a href="#">#AreYouKiddingMe?</a>
Early Learning Nation	<a href="http://www.earlylearningnation.com">www.earlylearningnation.com</a>	Early Learning Nation is an independent, nonprofit magazine focused on early learning with original content that includes local and national news, features and interviews, and resources from early learning communities across the nation. It's a gathering place for <a href="#">#brainbuilding</a> communities, believing in the power of building kids' brains to ensure a more equitable future.
First 1000 Days	<a href="http://www.thousanddays.org">www.thousanddays.org</a>	First 1000 Days is a global nonprofit organization working to ensure women and children have the healthiest first 1,000 days, through advocacy, education, and policies, with a focus on nutrition and development.
PNC Bank's Grow Up Great®	<a href="http://www.pnc.com/en/about-pnc/corporate-responsibility/grow-up-great.html">www.pnc.com/en/about-pnc/corporate-responsibility/grow-up-great.html</a>	Based on the fact that 90% of a child's brain develops by age five, PNC Bank's Grow Up Great® champions early childhood education through grants, toolkits, resources, and more. Since 2004, they've served children from birth through age five by empowering their caregivers and supporting teachers.
Harvard Center for the Developing Child	<a href="http://www.developingchild.harvard.edu">www.developingchild.harvard.edu</a>	The Center on the Developing Child's diverse activities align around building an R&D (research and development) platform for science-based innovation, and transforming the policy and practice landscape that supports and even demands change. We do this because society pays a huge price when children do not reach their potential, because half a century of policies and programs have not produced

		breakthrough outcomes, and because dramatic advances in science are ready to be used to achieve a promising future for every child.
National Association for the Education of Young Children (NAEYC)	<a href="http://www.naeyc.org">www.naeyc.org</a> <a href="http://www.naeyc.org/resources/position-statements/dap/principles">www.naeyc.org/resources/position-statements/dap/principles</a>	The National Association for the Education of Young Children (NAEYC) is a professional membership organization that works to promote high-quality early learning for all young children, birth through age 8, by connecting early childhood practice, policy, and research. NAEYC has identified key principles for early childhood development and learning.
Teaching Strategies®	<a href="http://www.teachingstrategies.com">www.teachingstrategies.com</a> <a href="https://teachingstrategies.com/solutions/teach/creative-curriculum-infants-toddlers-twos/">https://teachingstrategies.com/solutions/teach/creative-curriculum-infants-toddlers-twos/</a>	Teaching Strategies® believes the best and most powerful way to improve child outcomes is through effective teaching, and have created forward-thinking, comprehensive, research-based and research-proven curriculum resources. The Creative Curriculum® is research-based and supports the development of the whole child. High-quality, comprehensive resources empower educators to intentionally teach and care for our youngest learners during the most critical and formative years of development.
Vroom	<a href="https://www.vroom.org/">https://www.vroom.org/</a>	Vroom believes all parents want what's best for their children, so they joined with scientists, researchers, and parents to take the science out of the lab and put it in the hands of caregivers. Vroom provides science-based tips and tools to inspire families to turn shared, everyday moments into Brain Building Moments®.
Zero to Three	<a href="http://www.zerotothree.org">www.zerotothree.org</a>	Zero to Three's mission is to ensure all babies and toddlers have a strong start in life. We envision a society that has the knowledge and will to support all infants and toddlers in reaching their full potential. During the first three years of life, emotionally nourishing relationships lay the foundation for lifelong health and well-being. By supporting the caring adults who touch children's lives, we hope to maximize our long-term impact in ensuring all infants and toddlers have a bright future.

## CAMPAIGN DISCOVERY SESSIONS & THEMATIC ANALYSIS

The 0-3 Think Tank members and other Pinellas County stakeholders/subject matter experts were invited to participate in individual discovery sessions in April and May 2021, held virtually via Teams. Each interviewee was asked a series of questions to help identify current strengths, opportunities, challenges, and gaps in the zero to three space, as well as what success would look like for the Campaign. Below is the high-level thematic analysis that arose from the 30+ individuals who participated in the Campaign discovery sessions:



## Campaign Fundamentals:

- Reach and engage parents and caregivers of children, ages birth to three, with strategies to target young parents, fathers, grandparents, informal caregivers, and diverse populations that include but are not limited to African-American, Hispanic/Latinx, English as a second language, and lower socio-economic households.
- Feature messaging and strategies that are culturally responsive to meet diverse communities, and that take into consideration implicit biases, health disparities, and microaggressions.
- “Meet parents where they are” with a robust education and outreach plan that includes campaign ambassadors/champions who are of the neighborhoods and communities where parents reside.
- The Campaign should build in consumer feedback loops, pivoting and adapting when necessary.
- The Campaign should position education as the great equalizer, and parents as their child’s first and best teachers.
- The Campaign should start with the end in mind; that is, what do we want to achieve, what are the major milestones, and what will success look like each year after Campaign launch.

## Campaign Assumptions & Themes:

- Parents are their child’s first and best teachers. No degree is needed to teach and train baby’s brain, and focus should be on building parent’s confidence – and on giving them tools, coaching, and encouragement to feel confident.
- No app can replace the lap. Face-to-face interactions between adult and child are critical for bonding, attachment, and brain development.
- “Baby talk” should not be thought of as imitating babies’ babbling or cooing sounds but instead as fully grammatical speech that involves real words, elongated vowels, exaggerated tones of voice, higher pitches, and slower tempos spoken directly to babies to engage and invite them to respond (also called parentese).
- Small matters matter: there are countless everyday opportunities to talk to babies and build their brains. Diaper changes, bath times, mealtimes, and bedtimes offer opportunities to talk to babies: narrate their surroundings, talk through everyday activities, sing, count, point, play, read, and tell stories.

## Campaign Objectives – Building the Four Cs:

- **CONFIDENCE**– the Campaign will help parents and caregivers understand that no degree or certification is needed to train baby’s brain, and will strive to inspire confidence in their own capabilities and skills.
- **CAPABILITIES** – the Campaign will offer practical, educational approaches/ toolkits to ensure parents and caregivers have basic information on early brain development, early

childhood education, and developmental milestones, as well as opportunities to develop skills through modeling and coaching.

- **CAPACITIES** – the Campaign will provide just-in-time information and resources; take into consideration a parent’s capacity for learning and skills-building, and their unique backgrounds, socio-economic factors, and environment; the Campaign will also focus on everyday opportunities of avail to that parent.
- **COMMUNITIES** – the Campaign will strive to build communities through a variety of marketing, advertising, public relations, and outreach approaches to reach, educate, and engage parents and caregivers, with strategies for target audiences and an outreach plan to collectively engage and train campaign ambassadors/champions.

### Campaign Measurement & Success Indicator Ideas

- Campaign measurements and success indicators may include, but are not limited to, the number of parents and caregivers reached; number of toolkits or collaterals distributed; number of partners participating; number of champions/ambassadors trained; and any number of analytics related to website, social media, and advertising reach. In addition, some level of pre- and post- measurement should be considered.
- Over time, the Campaign – and its related collective outreach and education efforts – aim to contribute to longer-term positive outcomes for Pinellas County children and families. These may include, but are not limited to, incremental increases in:
  - Number of families participating in home visitation services
  - Ages and Stages Questionnaire (ASQ) and Ages and Stages Questionnaire: Social Emotional (ASQ:SE) scores for young children
  - Enrollment in Voluntary Pre-Kindergarten (VPK)
  - Kindergarten readiness scores

## APPENDIX B - REFERENCE SHEET

Below are sources for citations included in the RFP's Scope of Work – Overview and Background sections:

1. Ages & Stages website: <https://agesandstages.com/>
2. National Association for the Education of Young Children (NAEYC) website: <https://www.naeyc.org/search/Early%20childhood%20education%20principles>
3. Zero to Three website: <https://www.zerotothree.org/espanol/brain-development>
4. First 1000 Days website: <https://thousanddays.org/why-1000-days/building-brains/>
5. Boston Basics website: <https://boston.thebasics.org/>
6. McHale, J.; *The Importance of Brain Development for Ages Zero to Three*; presented at JWB Board Meeting (December 12, 2019); presentation slides: <https://www.jwbpinellas.org/wp-content/uploads/2019/11/IV-B-The-Importance-of-Brain-Development-for-Ages-Zero-to-Three.pdf>
7. Tronick, E., Adamson, L.B., Als, H., and Brazelton, T.B.; *Infant Emotions in Normal and Perturbed Interactions*; presented at biennial meeting of the Society for Research in Child Development (April 1975); video: <https://youtu.be/apzXGEbZht0>
8. JWB *Strategic Plan: FY21 – FY25*; document: <https://www.jwbpinellas.org/wp-content/uploads/2020/11/JWB-Strategic-Plan-FY21-FY25.pdf>
9. Navsaria, D.; *Early Experiences Elevate Everything: Early Brain and Child Development, and the Future of Society*; presented at JWB 7<sup>th</sup> Annual Children's Summit (January 29, 2021); video: <https://youtu.be/UqkwjEDXRdY> and presentation slides: <https://www.jwbpinellas.org/wp-content/uploads/2021/02/Early-Experiences-Elevate-Everything-Dr.-Dipesh-Navasaria-Keynote.pdf>
10. *The Science of Early Childhood Development: Closing the Gap Between What We Know and What We Do*; National Scientific Council on the Developing Child (2007); retrieved from: [www.developingchild.harvard.edu](http://www.developingchild.harvard.edu).
11. Heckman, J.; *The Heckman Equation*; retrieved from: <https://heckmanequation.org/>

**ATTACHMENT 1 –SERVICE AGREEMENT**  
**Between**  
**THE JUVENILE WELFARE BOARD OF PINELLAS COUNTY**  
**And**  
**Contractor’s Legal Name**

**I. Purpose**

The Juvenile Welfare Board of Pinellas County, hereinafter referred to as "JWB" and \_\_\_\_\_ hereinafter referred to as "Contractor," enter into this mutual Agreement, including all Attachments referred to herein, for the period commencing \_\_\_\_\_ and extending through \_\_\_\_\_ ("Initial Term") in order to provide \_\_\_\_\_. JWB has the option to renew this Agreement for three additional one-year terms (each year is a "Renewal Term") by providing Contractor with written notice of its intent to renew at least thirty (30) days prior to the end of the then current term. to provide Additional Services. This Agreement does not take effect and JWB has no responsibility for any of its obligations hereunder until this Agreement is executed by all parties to this Agreement. Exercise of the option to renew by JWB will be in writing and upon terms to be agreed upon by the parties.

**II. Staff**

\_\_\_\_\_ is the lead consultant who is designated to carry out this project. Contractor may employ staff at its own expense to execute the deliverables provided in accordance with this Agreement, and are subject to the supervision, personnel practices and policies of the Contractor. The Contractor shall not be considered an employee of JWB. The Contractor will ensure that individuals assigned to this project meet the qualifications necessary to successfully complete the assignment and that they comply with all provisions of this Agreement. Any change in assignment of work must be with prior written approval of JWB.

JWB reserves the right to require Contractor to replace any personnel performing work and services under this Agreement, including but not limited to Contractor’s employees and any affiliates or subcontractor’s employees, whom JWB judges to be incompetent, careless, unsuitable or otherwise objectionable, or whose continued use is deemed contrary to the best interests of JWB. This provision will not be deemed to give JWB the right to require Contractor to terminate a person's employment. Rather, this provision is intended to give JWB only the right to require that Contractor discontinue using personnel in the performance of services under this Agreement.

**III. Services**

Contractor agrees to deliver the Services as defined in Attachment 2-Statement of Work ("Services") pursuant to the General Conditions listed in Attachment 1 and any special conditions as stated in Section VIII of this Agreement.

**IV. Payment Terms**

JWB agrees to pay the Contractor up to \$\_\_\_\_\_ for Contractor’s completion of the services and JWB’s Approval of the deliverables in accordance with the amounts specified in Attachment 3-Fee Schedule. Prices shall remain firm for the duration of the contract.

## **V. Rates for Additional Professional Services**

Additional services may be requested of the Contractor. Any such additional work agreed to between JWB and the Contractor shall be performed, at the same rates (or lower as may be proposed) set forth in the schedule of fees included in Attachment 3.

JWB will pay the Contractor an hourly rate for work done over/above the Statement of Work. This may occur within the Initial Term, or in any of the three (3) optional one-year renewal periods, for reasons that include but are not limited to refine, enhance and/or add new work products to the Campaign (i.e. collaterals, PSAs, media buys, etc.), and to collaborate with JWB on implementing the success measurement plan.

## **VI. Method of Payment**

1. Invoices shall be submitted timely and only for deliverables per this Agreement. Invoices must be accompanied by the appropriate documentation as prescribed by JWB. The final invoice must be received by JWB no later than fifteen (15) days after this Agreement expires.
2. JWB shall reimburse the Contractor for allowable expenses within thirty (30) days of receipt of Contractor's proper invoice, as provided in Florida Statutes Chapter 218 Part VII.
3. To be deemed proper, all invoices must contain: (a) name and address of the Contractor; (b) invoice date; (c) the deliverable number and task letter or number associated with the good/service delivered; (d) an accurate description of goods and/or services delivered; (e) the correct quantity, unit price and total cost of goods and services delivered; (f) purchase order number and any discounts, when applicable; and (g) address to which payment should be mailed.

## **VII. Termination**

1. In the event funds to finance this Agreement become unavailable, JWB may terminate the Agreement upon no less than twenty-four (24) hours' notice in writing to the Contractor. Said notice shall be delivered by certified mail, return receipt requested, or in person with proof of delivery.
2. JWB shall endeavor, whenever possible and consistent with its legal obligations and principles of prudent management to provide thirty (30) days' notice for termination due to lack of funds. JWB shall be the final authority as to the availability of funds and extension of notice beyond the minimum time herein stated.
3. In addition to the rights as set forth in paragraph VII.2 above, this Agreement may be terminated by JWB for any reason whatsoever upon twenty-four (24) hours' written notice. Said notice shall be delivered by certified mail, return receipt requested, or in person with proof of delivery.
4. Contractor may only terminate this Agreement upon notice to JWB at least sixty (60) days prior to the end of the fiscal year next subject to audit, delivered in person, by facsimile or by US mail, return receipt requested.
5. Contractor shall only be compensated for deliverables accepted by JWB prior to the termination date.
6. The above provisions shall not limit JWB's right to remedies at law or to damages.

## **VIII. Special Conditions**

## 1. **Intellectual Property**

- a. Contractor acknowledges and agrees that all writings, works of authorship, technology, inventions, discoveries, ideas and other work product of any nature whatsoever, that are created, prepared, produced, authored, edited, amended, conceived or reduced to practice by the Contractor individually or jointly with others pursuant to this Agreement (regardless of when or where the Work Product is prepared or whose equipment or other resources is used in preparing the same) and all printed, physical and electronic copies, all improvements, rights and claims related to the foregoing, and other tangible embodiments thereof (collectively, “Work Product”), as well as any and all rights in and to copyrights, trade secrets, trademarks (and related goodwill), patents, and other intellectual property rights therein arising in any jurisdiction throughout the world and all related rights of priority under international conventions with respect thereto, including all pending and future applications and registrations thereof (collectively, “Intellectual Property Rights”), shall be the sole and exclusive property of JWB; however, the foregoing shall not apply to any and all methods, processes, or proprietary systems or procedures that have been developed by Contractor independently and prior to the scope of work pursuant to this agreement. Contractor acknowledges that, by reason of being contracted by JWB at the relevant times, to the extent permitted by law, all of the Work Product consisting of copyrightable subject matter is “work made for hire” as defined in the Copyright Act of 1976 (17 U.S.C. § 101), and such copyrights are therefore owned by JWB.
- b. Contractor understands that this Agreement does not, and shall not be construed, to grant the Contractor any license or right of any nature with respect to any Work Product or Intellectual Property, materials, software or other tools made available to Contractor by JWB.
- c. Contractor shall prepare Work Product for JWB that is original work and does not violate any laws, including, but not limited to, trademark and copyright laws and will defend, indemnify and hold harmless JWB for any all claims that the Work Product violates any trademark or copyright laws, infringes or copies or plagiarizes any other work or any other claim whatsoever pertaining to the Work Product.

2. **Acceptance and Rejection.** The parties agree that whether a deliverable is approved and accepted (“Approved”) is within JWB’s sole discretion. If a deliverable submitted to JWB is not approved and accepted, JWB will advise the Contractor in writing of the rejection and will advise Contractor of the date for re-submission of the deliverable and communicate why the deliverable was rejected. Failure to resubmit or correct any deficient deliverable in the time set forth by JWB may result in termination of the agreement.

**IX. SIGNATURES**

\_\_\_\_\_  
Beth A. Houghton,  
Chief Executive Officer  
Juvenile Welfare Board of Pinellas County

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date

**ATTACHMENT 1**  
**GENERAL CONDITIONS OF THE AGREEMENT**

**1. Agreement Revisions**

This Agreement and its attachments constitute the contractual relationship between the Contractor and JWB. No amendment to this Agreement or its attachments may be made without the prior written approval of JWB and Contractor.

**2. Governing Law/Venue/Dispute Resolution**

The parties agree to resolve any dispute or claim arising out of or relating to this Agreement (“Dispute”) pursuant to this Section. The parties agree to first send written notice to the other party of any Dispute and the parties will undertake good faith negotiation between themselves to resolve the Dispute via teleconference or videoconference or if JWB requires in its sole discretion, via in person meeting at JWB’s office. Each party shall be responsible for its own costs associated with any such meeting, including travel costs. The parties agree to attend no fewer than two negotiation sessions attended by the Vice President or higher of Contractor and by an executive team member of JWB. If the parties cannot resolve the Dispute during the good faith negotiations, the Dispute will next proceed to mediation upon written notice by either party. Within 21 days of receipt of the written notice of the demand for mediation of the Dispute, the parties shall participate in a mediation in Pinellas County with a mediator agreed upon by the parties from a list of the approved mediators for the Circuit Court of Pinellas County or for the United States District Court for the Middle District of Florida. Only if mediation is not successful may a party then proceed to institute litigation. The parties agree that the mediator’s fees, expenses and costs will be shared equally by the parties and the parties shall bear their own fees, expenses and costs associated with the mediation. Only in the event that the parties cannot resolve a Dispute through mediation, then either party may institute litigation in the Circuit or County Court (as applicable based on the amount in controversy) in and for Pinellas County, Florida. The parties agree that Florida law governs any and all disputes that arises between them regarding this Agreement and that any action brought for any Dispute may only be brought in the Courts in Pinellas County Florida and Contractor agrees that it submits to the exclusive jurisdiction of the Courts in Pinellas County Florida and that the Courts in Pinellas County Florida have personal jurisdiction over it for any such litigation. Contractor agrees it will not raise any argument that the Court does not have jurisdiction over it or that the forum is inconvenient or inappropriate or any other challenge to the Court’s jurisdiction over it for this dispute. Nothing herein waives any statute of limitations or extends any statute of limitations or filing deadline.

**3. Waiver**

JWB reserves the right to waive requirements of this Agreement and General Conditions where warranted by special circumstances. Any waiver shall be in writing and signed by JWB.

**4. Communications**

- a. The Contractor shall direct all communication and work products to: \_\_\_\_\_.
- b. Invoice Submission: If submitted electronically, please email to \_\_\_\_\_ and copy Finance ([FinanceInvoices@jwbpinellas.org](mailto:FinanceInvoices@jwbpinellas.org)). If mailed, please send to Attn: \_\_\_\_\_.
- c. JWB will direct all communication to \_\_\_\_\_.
- d. Either party may change its address or other contact information by giving the other party prior written notice of the new address or other contact information and date upon which such change



will become effective.

## **5. Assignments and Subcontracts**

Contractor shall not assign the responsibility of this Agreement to another party nor, except as otherwise noted in this Agreement, subcontract for any of the work contemplated under this Agreement without prior written approval of JWB. No such approval by JWB of any assignment or subcontract shall be deemed in any event or in any manner to provide for the incurrence of any obligation by JWB in addition to the total dollar amount stated in this Agreement. All such assignments or subcontracts shall be subject to the conditions of this Agreement and to any conditions of approval that JWB shall deem necessary.

## **6. Confidential Information**

Contractor must follow all laws regarding confidentiality of information including, but not limited to, HIPAA. Contractor shall not use or disclose any information which specifically identifies a subject, respondent, or any individual providing confidential information for this project under this Agreement and for any purpose not in conformity with federal, state, or local law and related regulations.

In the event of an improper disclosure of JWB information by Contractor, Contractor shall inform JWB of the improper disclosure and extent thereof within 2 business days of becoming aware of the improper disclosure. Contractor shall cooperate fully with JWB and take all necessary steps to correct and remedy any damage caused by the Contractor's improper disclosure and to prevent future improper disclosure. Contractor shall defend, indemnify and hold harmless JWB from any and all damages caused by the improper disclosure of any confidential information as defined by law including, but not limited to, Protected Health Information under HIPAA and any and all costs associated with remedying the disclosure. Contractor will indemnify and hold harmless JWB from any and all damages caused by the improper disclosure as defined by law of any information including but not limited to personally identifiable information (PII) and protected health information (PHI) as required under HIPAA, HITECH and FIPA regulations or other information that is confidential and/or exempt from disclosure per F.S. 119. JWB owns all data created as a result of this contract and has full discretion as to the use of the data. This provision shall survive the termination of this Agreement.

## **7. Public Records**

JWB is a public entity subject to Florida's Public Records Law, which includes provisions relating to records retention, production and confidentiality.

**IF THE CONTRACTOR HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE CONTRACTOR'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS CONTRACT, CONTACT THE CUSTODIAN OF PUBLIC RECORDS AT:**

**Juvenile Welfare Board of Pinellas County  
14155 58th St. No., Ste. 100  
Clearwater, FL 33760  
(727) 453-5600**

Contractors acting on behalf of JWB must comply with 119.0701 and must:

- 1) Keep and maintain public records required by JWB to perform the service.
- 2) Upon request from JWB's custodian of public records, provide JWB with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided in F.S. 119 or as otherwise provided by law.
- 3) Ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law for the duration of the contract term and following completion of the contract if the contractor does not transfer the records to the public agency.
- 4) Upon completion of the contract, transfer, at no cost, to JWB all public records in possession of Contractor or keep and maintain public records required by JWB to perform the service. If the Contractor transfers all public records to JWB upon completion of the contract, Contractor shall destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. If Contractor keeps and maintains public records upon completion of the contract, the Contractor shall meet all applicable requirements for retaining public records. All records stored electronically must be provided to JWB, upon request from JWB's custodian of public records, in a format that is compatible with the information technology systems of JWB.

In addition, Contractors should be aware that social security numbers are confidential and exempt from disclosure (119.071(5)) and personal identifying information of a child or the parent or guardian of the child held by JWB or service provider under contract with JWB is exempt from disclosure (125.901(11)). There are many other exemptions in the law that Contractor should be cognizant exist. However, for all Contractors, any and all contracts between JWB and Contractor, program methodology, budgets, requests for reimbursements, emails, other written correspondence and any other documents exchanged between the Contractor and JWB are generally public records and will be disclosed in the sole discretion of JWB and must be retained in accordance with Florida's record retention policy. Contractors should not provide any documents to JWB containing Trade Secrets, as defined by F.S. 812.08, or exempt or confidential and exempt information to JWB without specifically marking such document. By submitting any documents or information whatsoever to JWB, Contractor agrees that JWB may use and disclose all information and documents submitted for any purpose JWB sees fit and that it is within JWB's sole discretion to determine if any information submitted is exempt from disclosure.

Any Contractor who receives a Public Records request for records pertaining to JWB or services funded by JWB, must advise JWB within two (2) business days of the records request and JWB and Contractor will work together to respond to any such request. This provision shall survive termination of this Agreement.

## **8. Return of Funds**

Contractor agrees to return to JWB any overpayment due to costs not incurred or costs disallowed pursuant to the terms of this Agreement and such funds shall be considered JWB funds and shall be refunded to JWB in accordance with its instructions. Should Contractor fail to return said funds, Contractor shall be responsible for all costs and fees of collection incurred by JWB, including, but not limited to attorney fees and court costs including any pre-suit collections fees and costs. This provision survives termination of this Agreement and return of funds for overpayment or disallowance

will be required even if the overpayment or disallowance is discovered after this Agreement is terminated.

## **9. Special Situations and Incidents**

Contractor agrees to inform JWB within one (1) business day of any circumstances or events which may reasonably be considered to jeopardize its capability to continue to meet its obligations under the terms of this Agreement.

## **10. Compliance with all applicable laws**

Contractor (and its employees and contractors) represents that all actions taken by Consultant will be in conformity with all local, state and federal, laws, rules, regulations, directives and orders.

## **11. Conflict of Interest**

The Contractor represents that it presently has no interest and shall acquire no interest, either direct or indirect, which would conflict in any manner with the performance or services required hereunder. The Contractor further represents that no person having any such interest shall be employed by the Contractor during the agreement term and any extensions.

The Contractor shall promptly notify the JWB point of contact, in writing, of all potential conflicts of interest for any prospective business association, interest, or other circumstance, which may influence or appear to influence the Contractor's judgment or quality of services being provided hereunder. Such written notification shall identify the prospective business association, interest or circumstance, the nature of work that the Contractor may undertake and request an opinion of JWB as to whether the association, interest or circumstance would, in the opinion of JWB, constitute a conflict of interest if entered into by the Contractor. JWB agrees to notify the Contractor of its opinion, within thirty (30) days of receipt of notification by the Contractor.

## **12. Public Entity Crimes**

Per Section 287.133, Florida Statutes, a person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a bid on a contract to provide any goods or services to a public entity, may not submit a bid on a contract with a public entity for the construction or repair of a public building or public work, may not submit bids on leases of real property to a public entity, may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with a public entity, and may not transact business with a public entity in excess of the threshold amount provided in Section 287.017, for CATEGORY TWO for a period of 36 months from the date of being placed on the convicted vendor list.

## **13. Certification that Contractor is legally able to contract with JWB**

In compliance with F.S. 287.135(3)(a), a Contractor is ineligible to and may not enter into a contract with JWB if the Contractor is on the Scrutinized Companies that Boycott Israel List, created pursuant to s. 215.4725 or, is engaged in a boycott of Israel. In compliance with F.S. 287.135(3)(b), for contracts of \$1 million or more, a Contractor is ineligible to and may not enter into a contract a contract with JWB if the Contractor is (1) is on the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Section List, created pursuant to s. 215.473 or, (2) is engaged in business operations in Cuba or Syria. By entering into this Agreement, you are certifying that you are eligible to contract with JWB and are not participating in a boycott of

Israel, are not on the Scrutinized Companies with Activities in Sudan List, are not on the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List and that you do not have business operations in Cuba or Syria. In addition, this Agreement may be terminated if Contractor (1) has found to have submitted a false certification, (2) has been placed on the Scrutinized Companies that Boycott Israel List, or is engaged in a boycott of Israel, (3) has been placed on the Scrutinized Companies with Activities In Sudan List or the Scrutinized Companies with Activities in The Iran Petroleum Energy Sector List; or, (4) has been engaged in business operations in Cuba or Syria.

#### **14. Insurance, Public Liability, Bodily Injury, and Property Damage**

The Contractor will procure, pay for, and maintain, throughout the period of this Agreement, on behalf of the Contractor and JWB, the following MINIMUM limits of insurance coverage with responsible companies, eligible to do business in the State of Florida, which maintain a rating of A-(IX) or higher with A.M. Best.

##### **A. Worker's Compensation**

Part One:	"Statutory"
Part Two: Each Accident	\$500,000
Disease - Policy Limit	\$ 500,000
Disease - Each Employee	\$ 500,000

Such insurance shall be no more restrictive than that provided by the latest edition of the standard Workers' Compensation Policy, as filed for use in Florida by the National Council on Compensation Insurance (NCCI), without any restrictive endorsements other than any endorsements required by NCCI or the State of Florida. In addition to coverage for the Florida Workers' Compensation Act, where appropriate, coverage is to be included for the Federal Employer's Liability Act and any other applicable Federal or State law.

##### **B. Commercial General Liability**

General Aggregate	\$ 1,000,000
Products/Completed Operations Aggregate	\$ 1,000,000
Personal and Advertising Injury	\$ 1,000,000
Each occurrence	\$ 1,000,000

Such insurance shall be no more restrictive than that provided by the latest edition of the standard Commercial General Liability Form (Form CG 00 01) as filed for use in the State of Florida by the Insurance Services Office (ISO), without any restrictive endorsements other than any endorsements specifically required by ISO or the State of Florida.

JWB and its officials, officers and employees shall be included as an "Additional Insured" on the Commercial General Liability coverage a form no more restrictive than ISO form CG 20 10 (Additional Insured – Owners, Lessees, or Contractor).

##### **C. Automobile**

Combined single limit	\$ 500,000
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Such insurance shall be no more restrictive than that provided by Section II (Liability

Coverage) of the most recent version of the standard Business Auto Policy (ISO Form CA 00 01) without any restrictive endorsements, including coverage for liability contractually assumed, and shall cover all owned, non-owned, and hired autos used in the performance of the work under this Agreement.

**D. Professional Liability**

Each Claim	\$1,000,000
Annual Aggregate	\$ 1,000,000
Deductible or Self Insured Retention	\$25,000 Maximum per claim

Such insurance shall be on a form acceptable to JWB and shall cover Contractor for those sources of liability arising out of the rendering or failure to render professional services in the performance of the services required in the Agreement including any hold harmless and/or indemnification agreement.

If, the Professional Liability is provided on a Claims Made Form, the retroactive date must be no later than the first date of this Agreement and such claims-made coverage must respond to all claims reported within three years following the period for which coverage is required.

**Excess or Umbrella Insurance:**

All required limits of insurance may be satisfied by the use of any combination of primary and excess/umbrella liability insurance coverages. All Certificates of Insurance for umbrella and excess liability policies should clearly indicate which underlying policies such excess or umbrella liability policies are applicable to on an excess basis.

**Evidence of Insurance:**

Contractor shall not commence work until the required insurance is in force and evidence of insurance meeting all of the requirements set forth herein has been provided to JWB.

JWB at all times reserves the right to request such additional documentation and evidence of insurance as in its sole discretion it may require and the Contractor hereby agrees to provide same. An appropriate Certificate of Insurance signed by an authorized representative of the insurer shall be satisfactory evidence of insurance. With respect to the Commercial General Liability, an appropriate Certificate of Insurance signed by an authorized representative of the insurer, and copies of the actual additional insured endorsement(s) as issued on the policy(ies), shall be satisfactory evidence of such insurance.

The evidence of insurance provided by Contractor must include a disclosure of the amount(s) of all deductibles or self-insured retentions applicable to any policy of insurance requiring a maximum deductible or self-insured retention under this section.

Until such insurance is no longer required by this Agreement, Contractor shall provide JWB with renewal or replacement evidence of insurance at least fifteen (15) days prior to the expiration or termination of such insurance.

Notwithstanding the prior submission of a Certificate of Insurance, copies of endorsements, or other evidence initially acceptable to JWB, if requested by JWB, Contractor shall, within thirty (30) days after receipt of a written request from JWB, provide JWB with a certified copy(ies) of the policy(ies) providing the coverage required herein. Contractor may redact or omit, or cause to be redacted or omitted, those provisions of the policy or policies which are not relevant to the insurance required herein.

**Notice of Cancellation:**

All required policies must be endorsed to provide JWB with 30 days prior notice of cancellation.

**Primary and Non-Contributory:** The insurance provided by the Contractor shall apply on a primary basis to and shall not require contribution from, any insurance maintained by JWB. Any insurance or self-insurance maintained by JWB shall be in excess of, and shall not contribute with, the insurance provided by Contractor.

**Deductibles/Self-Insured Retentions:** Except as otherwise specifically authorized in this Agreement, no deductible or self-insured retention for any insurance required of Contractor pursuant to this Agreement will be allowed. To the extent any required insurance is subject to any deductible or self-insured retention (whether with or without prior approval of JWB), Contractor shall be solely responsible for paying any such deductible or self-insured retention.

**Non-Waiver/Remedies:** Compliance with these insurance requirements shall not limit the liability of Contractor, its subcontractors, sub-subcontractors, employees or agents. Any remedy provided to JWB or JWB's officials, officers or employees by the insurance provided by Contractor shall be in addition to and not in lieu of any other remedy (including, but not limited to, as an indemnitee of Contractor) available to JWB under this Agreement or otherwise.

Neither approval nor failure to disapprove insurance furnished by Contractor shall relieve Contractor from the responsibility to provide insurance as required by this Agreement.

**15. Indemnification**

Contractor shall defend, indemnify, and hold harmless JWB, its agents, and employees from and against any and all liabilities, claims, judgments, or actions including, but not limited to, attorney's fees and all costs that may hereafter at any time be made or brought by any person or entity on account of any claim including but not limited to, personal injury, wrongful death, invasion of privacy, property damage, loss of monies, civil rights violation, or discrimination allegedly caused in whole or part by any act or omission, including but not limited to, breach of contract, negligent act, wrongful act, intentional act, omission, and any acts of fraud or defalcation, of the Contractor, its agents, employees, or subcontractors, arising out of or relating to its performance of this Agreement or for Contractor's improper disclosure of confidential and/or exempt information, or failure to comply with F.S. 119 or any other applicable law, rule or regulation. In no event will the Contractor be liable for or have any obligation to defend JWB against such liability, claims, judgments, or actions, including costs and attorney's fees, arising out of the sole negligent acts of JWB. This provision survives termination of the Agreement.

**16. E-Verify**

In accordance with F. S. 448.095, no later than the first date of the term Agreement, Contractor must register with and use the U.S. Department of Homeland Security's E-Verify system, <https://e-verify.uscis.gov/emp>, to verify the work authorization status of all employees hired on or after the first date of the term Agreement and during the remainder of the term of this Agreement. Evidence may consist of, but is not limited to, providing notice of your E-Verify number. The link for instructions on how to provide proof of participation/E-Verify enrollment is <https://www.e-verify.gov/faq/how-do-i-provide-proof-of-my-participation-enrollment-in-e-verify>.

The statute also applies to subcontractors performing work under this Agreement directly for JWB. The subcontractor must use the E-Verify system for any employees it may hire during the term of this

Agreement. The Subcontractors must provide affidavits stating the subcontractor does not employ, contract with, or subcontract with an unauthorized alien, as defined by F. S. § 448.095(k). Subcontractors are defined in Florida Statute as both individuals and legal entities. Contractor must maintain copies of all subcontractor affidavits for the duration of the JWB Agreement and these affidavits shall be subject at all times to inspection, review, or audit by JWB personnel or its duly authorized agent.

Notwithstanding any other terms of this Agreement, if JWB has a good faith belief that you have knowingly hired, recruited or referred an alien who is not duly authorized to work by the immigration laws or the Attorney General of the United States, JWB shall terminate this Agreement. Contractor may be liable for all costs associated with JWB securing the same services, inclusive, but not limited to, higher costs for the same services and rebidding costs (if necessary). Any challenge to termination under this provision must be filed in the Circuit Court no later than 20 calendar days after the date of termination. If this Agreement is terminated for a violation of the statute, Contractor may not be awarded a public contract for a period of one (1) year after the date of termination.

**Service Agreement**

**Attachment 2-Statement of Work**

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(Document to be Provided Prior to Agreement Execution)



**Service Agreement**

**Attachment 3-Fee Schedule**

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(Document to be Provided Prior to Agreement Execution)

## ATTACHMENT 2-PROPOSAL CHECKLIST

<b>RFP Title:</b> Early Childhood Public Awareness Campaign	<b>Proposal due date and time:</b> 11/30/2021			
<b>Proposal to be submitted to:</b> Written proposals must be submitted via email to <a href="mailto:RFP@jwbpinellas.org">RFP@jwbpinellas.org</a>				
<b>#</b>	<b>Proposal submission to include</b> ( <i>Checklist is for Proposers use only, not to be submitted with Proposal</i> )	Yes	No	NA
1	Signed Addenda, if issued			
2	Form 1 – Proposal Signature Form (signed)			
4	Attach Resumes or LinkedIn profile for Key Personnel			
5	Attach Draft Statement of Work			
6	Form 3 - Non-Collusion Affidavit (signed)			
7	Form 4 - References			
8	Form 5 - Service Agreement Terms & Conditions Compliance Checklist			
9	Form 6 - IRS W-9 (signed)			
10	Form 2 - Cost-Proposal (excel)			