

PINELLAS COUNTY BOARD OF COUNTY COMMISSIONERS
 400 S. FT. HARRISON AVENUE
 ANNEX BUILDING – 6TH FLOOR
 CLEARWATER, FL 33756



REQUEST FOR PROPOSAL

RFP – FORMAL/INFORMAL

*SUBMITTALS ARE OPENED PUBLICLY AND
 ARE ACCEPTED VIA PINELLAS EPRO*

THE MISSION OF PINELLAS COUNTY

Pinellas County Government is committed to progressive public policy, superior public service, courteous public contact, judicious exercise of authority and sound management of public resources to meet the needs and concerns of our citizens today and tomorrow.

ISSUE DATE: Thursday, June 16, 2022

SOLICITATION NUMBER: **22-0478-P**

SOLICITATION TITLE: **Public Information and Outreach Consulting Services - Utilities**

DEADLINE FOR WRITTEN QUESTIONS: **Friday, July 1, 2022 by 3:00 PM Eastern Time**

SUBMIT QUESTIONS: ALL QUESTIONS MUST BE SUBMITTED IN PINELLAS EPRO WITHIN THE Q&A - TAB.

ALL SUBMITTALS ARE DUE BY: **Tuesday, July 12, 2022 by 3:00 PM Eastern Time**

PRE-CONFERENCE INFORMATION: **NOT APPLICABLE**

SITE VISIT INFORMATION: **NOT APPLICABLE**

SOLICITATION CONTACT INFORMATION:

NAME: **Lucy Nowacki**

EMAIL: **Inowacki@pinellascounty.org**

SUBMITTALS MAY NOT BE WITHDRAWN FOR 120 DAYS AFTER OPENING DATE.

Please Note:

From time to time, addenda may be issued to this solicitation. Any such addenda will be posted on the same Web site, www.pinellascounty.org/purchase/Current_Bids1.htm, from which you obtained this solicitation.

Before submitting, you should check our Web site to download any addenda that may have been issued. Please remember to sign and return Addenda Acknowledgement Form with completed bid package if applicable.

AUTHORIZED BY:

Merry Celeste

Merry Celeste, CPPB

Division Director of Purchasing and Risk Management

CONTRACTOR MUST COMPLETE THE FOLLOWING

CONTRACTORS ARE CAUTIONED THAT THE POLICY OF THE BOARD OF COUNTY COMMISSIONERS, PINELLAS COUNTY, IS TO ACCEPT THE LOWEST RESPONSIVE AND RESPONSIBLE SUBMITTAL RECEIVED MEETING SPECIFICATIONS. NO CHANGES REQUESTED BY A CONTRACTOR DUE TO AN ERROR IN PRICING WILL BE CONSIDERED AFTER THE SOLICITATION OPENING DATE AS ADVERTISED. BY SIGNING THIS SUBMITTAL FORM, CONTRACTORS ARE ATTESTING TO THEIR AWARENESS OF THIS POLICY AND ARE AGREEING TO ALL OTHER SOLICITATION TERMS AND CONDITIONS, INCLUDING ANY INSURANCE REQUIREMENTS CONTAINED HEREIN.

CONTRACTOR NAME: _____ (As shown on W-9)
DBA: _____ (If applicable)
MAILING ADDRESS: _____ (As shown on W-9)
CITY / STATE / ZIP: _____ (As shown on W-9)
CONTRACTOR EMAIL: _____ (Primary Company Email Address)
REMIT TO NAME: _____ (As Shown on contractors Invoice)
FEIN#: _____ (As shown on W-9)

PAYMENT TERMS: ____% ____DAYS, NET 45 (PER F.S. 218.73)
DEPOSIT, IF REQUIRED, IS ATTACHED IN THE AMOUNT OF \$ _____

Proper Corporate Identity is needed when you submit your quote, especially how your firm is registered with the Florida Division of Corporations. Please visit dos.myflorida.com/sunbiz/ for this information. It is essential to return a copy of your W-9 with your quote. Thank you.

CONTRACTOR CONTACT INFORMATION

CONTACT NAME: _____
PHONE NUMBER: _____
FAX NUMBER: _____
EMAIL ADDRESS: _____

I HEREBY AGREE TO ABIDE BY ALL TERMS AND CONDITIONS OF THIS RFP EXCEPT AS NOTED BY EXCEPTION, INCLUDING ALL INSURANCE REQUIREMENTS & CERTIFY I AM AUTHORIZED TO SIGN THIS RFP FOR THE PROPOSER.

AUTHORIZED SIGNATURE: _____
PRINT NAME: _____
TITLE: _____

SEE SECTION F FOR PRICING SUMMARY

THIS FORM MUST BE RETURNED WITH YOUR RESPONSE

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SECTION A - GENERAL CONDITIONS**SECTION A - GENERAL CONDITIONS****1. CONTRACTOR SUBMISSION**

- a. Submittals shall be uploaded utilizing Pinellas ePro procurement website (<https://www.ebids.pinellas.gov/bsol/>). Failure to comply could result in the submittal being rejected.
- b. Submittals must be on the forms furnished. Submittals sent via email will not be considered.

2. WRITTEN REQUESTS FOR INTERPRETATIONS/CLARIFICATIONS

No oral interpretations will be made to any firms as to the meaning of specifications or any other contractor documents. All questions pertaining to the terms and conditions or scope of work of this solicitation must be sent in writing (electronically) to the Purchasing and Risk Management Division and received by the date specified in solicitation. Responses to questions may be handled as an addendum if the response would provide clarification to requirements of the solicitation. All such addenda shall become part of the agreement documents. The County will not be responsible for any other explanation or interpretation of the proposed solicitation made or given prior to the award of the agreement. The Purchasing and Risk Management Division will be unable to respond to questions received after the specified time frame.

3. DESCRIPTION OF GOODS/SERVICES/SUPPLIES

- a. Any manufacturer's names, trade names, brand name, or catalog numbers used in specifications are for the purpose of describing and establishing general quality levels. Such references are not intended to be restrictive. Submittals will be considered for all brands which meet the quality of the specifications listed for any items.
- b. contractors are required to state exactly what they intend to furnish otherwise they shall be required to furnish the items as specified.
- c. contractor submission shall include all data necessary to evaluate and determine the quality of the item(s) they intend to furnish.

4. ALTERNATES

Unless otherwise provided in the solicitation, alternatives may be included in the plans, specifications, and/or solicitation. When the County includes alternates in the solicitation, the contractor shall indicate on the submittal the cost of said alternate and sum to be deducted or added to the base pricing. Such alternates may or may not be accepted by the County. If approved, it is at the County's discretion to accept said alternate(s) in any sequence or combination therein. If the contractor is proposing an alternate that is not provided in the solicitation, alternate(s) must be submitted within the Pinellas ePro Q & A Tab prior to the question deadline, and receive approval prior to the solicitation opening date in order to be considered for award.

5. RIGHTS OF PINELLAS COUNTY IN REQUEST FOR PROPOSAL PROCESS

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

- a. Pinellas County reserves the right to rank contractors and negotiate with the highest-ranking contractor. Negotiation with an individual vendor does not require negotiation with others.
- b. Pinellas County reserves the right to select the contractor that it believes will serve the best interest of Pinellas County.
- c. Pinellas County reserves the right to reject any or all submittals. The respective constitutional officer, county administrator on behalf of the board of county commissioners or within their delegated financial approval authority, or director of purchasing, within their delegated financial approval authority shall have the authority when the public interest will be served thereby to reject all submittals or parts of submittals at any stage of the procurement process through the award of the agreement.
- d. Pinellas County reserves the right to cancel the entire submittal.
- e. Pinellas County reserves the right to remedy or waive technical or immaterial errors in the solicitation or submittals received.
- f. Pinellas County reserves the right to request any necessary clarifications or revisions data without changing the terms of the solicitation.

SECTION A - GENERAL CONDITIONS

- g. Pinellas County reserves the right to require the contractor to perform the services required on the basis of the original submittal without negotiation.

6. EVALUATION CRITERIA

The evaluation criteria define the factors that will be used by the Evaluation Committee to evaluate and score responsive, responsible and qualified submittals. Contractor shall include sufficient information to allow the Evaluation Committee to thoroughly evaluate and score their submittal. Each submission shall be evaluated and ranked by an Evaluation Committee. The contract will be awarded to the most qualified contractor, per the evaluation criteria listed in the Scope of Work of the solicitation.

7. COSTS INCURRED BY PROPOSERS

All expenses involved with the preparations and submissions to the County and any oral presentations, or any work performed in connection therewith, shall be borne solely by the contractor(s). No payment will be made for any responses received, or for any other effort required of, or made by, the contractor(s) prior to contract commencement unless otherwise specified in the Scope of Work in this solicitation.

8. ORAL PRESENTATION

An oral presentation may be requested of any contractor, at the Evaluation Committee's discretion. If an oral presentation is requested the written evaluation process shall be utilized to short list proposals. If required as part of the evaluation process, the oral presentation shall be scored as specified in the Scope of Work of the RFP. The most qualified contractor as determined by evaluation process shall proceed with the contracting process.

9. CONFLICT OF INTEREST

- a. 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 during the agreement term and any extensions. In addition, the contractor shall not offer gifts or gratuities to County employees as County employees are not permitted to accept gifts or gratuities. By signing this document, the contractor acknowledges that no gifts or gratuities have been offered to County employees or anyone else involved in this competitive solicitation process.
- b. The contractor shall promptly notify the County's representative, in writing, by certified mail, 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 the County as to whether the association, interest or circumstance would, in the opinion of the County, constitute a conflict of interest if entered into by the contractor. The County agrees to notify the contractor of its opinion, by certified mail, within thirty days of receipt of notification by the contractor.
- c. It is essential to government procurement that the process be open, equitable and ethical. To this end, if potential unethical practices including but not limited to collusion, receipt or solicitation of gifts and conflicts of interest (direct/indirect) etc. are observed or perceived, please report such activity to:

Pinellas County Clerk of Circuit Court – Division of Inspector General

Phone – (727) 45FRAUD (453-7283)

Fax – 727-464-8386

10. WITHDRAWAL OF PROPOSAL

The submittal may be withdrawn prior to the bid opening date, however, a submittal may not be withdrawn for a period of time as specified in this solicitation document.

11. LATE PROPOSAL OR MODIFICATIONS

- a. Submittals and modifications received after the time set for the submission will not be considered. This upholds the integrity of the process.

SECTION A - GENERAL CONDITIONS

b. Modifications in writing received prior to the time set for the submittal will be accepted.

12. PROPOSALS FROM RELATED PARTIES / MULTIPLE PROPOSALS RECEIVED FROM ONE VENDOR

Where two (2) or more related parties each submit a proposal or multiple proposals are received from one (1) vendor, for any contract, such proposals shall be judged non-responsive. Related parties mean proposers or the principles thereof, which have a direct or indirect ownership interest in another proposer for the same contract or in which a parent company or the principles thereof of one (1) proposer have a direct or indirect ownership interest in another bidder or proposer for the same contract.

13. JOINT VENTURES

All contractors intending to submit as a joint venture are required to have filed proper documents with the Florida Department of State, the Division of Professions, Construction Industry Licensing Board and any other state or local licensing Agency prior to submitting (see Section 489.119 Florida Statutes).

Joint ventures must provide an affidavit attesting to the formulation of a joint venture and provide either proof of incorporation as a joint venture or a copy of the formal joint venture agreement between all joint venture parties, indicating their respective roles, responsibilities and levels of participation for the project.

14. PROVISION FOR OTHER AGENCIES

Unless otherwise stipulated by the contractor(s), the contractor(s) agree to make available to all Government agencies, departments, and municipalities the prices submitted in accordance with said terms and conditions therein, should any said governmental entity desire to buy under this solicitation. Eligible users shall mean all State of Florida Agencies, the legislative and judicial branches, political subdivisions (counties, local district school boards, community colleges, municipalities, or other public agencies or authorities), which may desire to purchase under the terms and conditions of the agreement.

15. COLLUSION

The contractor, by affixing his signature to this proposal, agrees to the following: "Contractor certifies that its submittal is made without previous understanding, agreement, or connection with any person, firm or corporation making a submittal for the same item(s) and is in all respects fair, without outside control, collusion, fraud, or otherwise illegal action."

16. STATEMENT RELATIVE TO PUBLIC ENTITY CRIMES

Contractor is directed to the Florida Public Entity Crime Act, Fla. Stat. 287.133, and Fla. Stat. 287.135 regarding Scrutinized Companies, and contractor agrees that its submittal and, if awarded, its performance of the agreement will comply with all applicable laws including those referenced herein. contractor represents and certifies that contractor is and will at all times remain eligible to submit for and perform the services subject to the requirements of these, and other applicable, laws. contractor agrees that any agreement awarded to contractor will be subject to termination by the County if contractor fails to comply or to maintain such compliance.

17. COUNTY INDEMNIFICATION VARIANCE FROM STANDARD TERMS & CONDITIONS

Contractor agrees to indemnify, pay the cost of defense, including attorney's fees, and hold harmless the County, its officers, employees and agents from all damages, suits, actions or claims, including reasonable attorney's fees incurred by the County, of any character brought on account of any injuries or damages received or sustained by any person, persons, or property, or in any way relating to or arising from the Agreement; or on account of any act or omission, neglect or misconduct of Contractor; or by, or on account of, any claim or amounts recovered under the Workers' Compensation Law; or of any other laws, regulations, ordinance, order or decree; or arising from or by reason of any actual or claimed trademark, patent or copyright infringement or litigation based thereon; or for any violation of requirements of the Americans with Disabilities Act of 1990, as may be amended, and all rules and regulations issued pursuant thereto (collectively the "ADA") except when such injury, damage, or violation was caused by the sole negligence of the County.

SECTION A - GENERAL CONDITIONS**18. VARIANCE FROM STANDARD TERMS & CONDITIONS**

All standard terms and conditions stated in this section apply to this Agreement except as specifically stated in the subsequent sections of the document, which take precedence over this section, and should be fully understood by contractors prior to submitting on this requirement.

19. ADA REQUIREMENT FOR PUBLIC NOTICES

Persons with disabilities requiring reasonable accommodation to participate in this proceeding/event, should call 727-464-4062 (voice/tdd) fax 727-464-4157, not later than seven days prior to the proceeding.

20. PROCUREMENT POLICY FOR RECYCLED MATERIALS

- a. Pinellas County wishes to encourage its contractors to use recycled products in fulfilling contractual obligations to the County and that such a policy will serve as a model for other public entities and private sector companies.
- b. When awarding a purchase or recommending a purchase for products, materials, or services, the Director of Purchasing and Risk Management may allow a preference to a responsive contractor who certifies that their product or material contains the greatest percentage of postconsumer material. If solicitation includes paper products, contractor must certify that their materials and/or products contain at least the content recommended by the EPA guidelines.
- c. On all quotes over fifty thousand dollars (\$50,000) and informal quotes under fifty thousand dollars (\$50,000), or as required by law, the Director of Purchasing and Risk Management shall require vendors to specify which products have recycled materials, what percentage or amount is postconsumer material, and to provide certification of the percentages of recycled materials used in the manufacture of goods and commodities procured by the County.
- d. Price preference is not the preferred practice the County wishes to employ in meeting the goals of this resolution. If a price preference is deemed to serve the best interest of the County and further supports the purchase of recycled materials, the Director of Purchasing will make a recommendation that a price preference be allowed up to an amount not to exceed 10% above the lowest complying submittal received.

Definitions for Recycled Materials:

Recovered Materials: Materials that have recycling potential, can be recycled, and have been diverted or removed from the solid waste stream for sale, use or reuse, by separation, collection, or processing.

Recycled Materials: Materials that contain recovered materials. This term may include internally generated scrap that is commonly used in industrial or manufacturing processes, waste or scrap purchased from another manufacturer and used in the same or a closely related product.

Postconsumer Materials: Materials which have been used by a business or a consumer and have served their intended end use, and have been separated or diverted from the solid waste stream for the purpose of recycling, such as; newspaper, aluminum, glass containers, plastic containers, office paper, corrugated boxes, pallets or other items which can be used in the remanufacturing process.

21. ADDITIONAL REQUIREMENTS

The County reserves the right to request additional goods or services relating to this agreement from the contractor. When approved by the County as an amendment to this agreement and authorized in writing, the contractor shall provide such additional requirements as may become necessary.

22. AGREEMENT

In addition to being subject to all terms and conditions in this solicitation, all responses are subject to the terms and conditions in the agreement attached to the solicitation. Additional or modified terms and conditions in the agreement may be necessary depending on the responses to the solicitation, including any exceptions stated by the contractor as required by Section A, PREPARATION OF SUBMITTAL of this solicitation. However, the County may reject any exception proposed by the contractor and shall not be bound by any additional or modified terms and conditions that are in conflict with the terms and conditions in the agreement, or are not acceptable to, or have been declared to be non-negotiable by the County, as determined in its sole discretion.

SECTION A - GENERAL CONDITIONS**23. INTEGRITY OF REQUEST FOR PROPOSAL (RFP) DOCUMENTS**

Contractors shall use the original solicitation form(s) provided by the Purchasing & Risk Management Division and enter information only in the spaces where a response is requested. Contractors may use an attachment as an addendum to the solicitation form(s) if sufficient space is not available on the original form for the contractor to enter a complete response. Any modifications or alterations to the original solicitation documents by the contractor, whether intentional or otherwise, will constitute grounds for rejection of a solicitation. Any such modifications or alterations a contractor wishes to propose must be clearly stated in the contractor's submittal response and presented in the form of an addendum to the original solicitation documents.

24. PUBLIC RECORDS/TRADE SECRETS

Pinellas County Government is subject to the Florida Public Records law (Chapter 119, Florida Statutes), and all documents, materials, and data submitted to any solicitation as part of the response are governed by the disclosure, exemption and confidentiality provisions relating to public records in Florida Statutes. Except for materials that are "trade secrets" or "confidential" as defined by applicable Florida law, ownership of all documents, materials, and data submitted in response to the solicitation shall belong exclusively to the County.

To the extent that contractor desires to maintain the confidentiality of materials that constitute trade secrets pursuant to Florida law, trade secret material submitted must be identified by some distinct method that the materials that constitute a trade secret, and contractor shall provide an additional copy of the contractor's submittal that redacts all designated trade secrets. By submitting materials that are designated as trade secrets and signature of the contractor signature page, contractor acknowledges and agrees:

- i. That after notice from the County that a public records request has been made for the materials designated as a trade secret, the contractor shall be solely responsible for defending its determination that submitted material is a trade secret that is not subject to disclosure at its sole cost, which action shall be taken immediately, but no later than ten (10) calendar days from the date of notification or contractor will be deemed to have waived the trade secret designation of the materials;
- ii. That to the extent that the contractor with trade secret materials is evaluated, the County and its officials, employees, agents, and representatives in any way involved in processing, evaluating, negotiating agreement terms, approving any agreement based on the contractor, or engaging in any other activity relating to the competitive selection process are hereby granted full rights to access, view, consider, and discuss the materials designated as trade secrets through the final agreement award;
- iii. To indemnify and hold the County, and its officials, employees, agents and representatives harmless from any actions, damages (including attorney's fees and costs), or claims arising from or related to the designation of trade secrets by the contractor, including actions or claims arising from the County's non-disclosure of the trade secret materials.
- iv. That information and data it manages as part of the services may be public record in accordance with Chapter 119, Florida Statutes and Pinellas County public record policies. Contractor agrees prior to providing goods/services it will implement policies and procedures to maintain, produce, secure and retain public records in accordance with applicable laws, regulations, and County policies, which are subject to approval by the County, including but limited to the Section 119.0701, Florida Statutes.

Notwithstanding any other provision in the solicitation, the classification as trade secret of the entire submission document, line item and/or total contractor prices, the work, services, project, goods, and/or products to be provided by contractor, or any information, data, or materials that may be part of or incorporated into an agreement between the County and the contractor is not acceptable to the County and will result in a determination that the contractor submittal is nonresponsive; the classification as trade secret of any other portion of a submittal document may result in a determination that the submittal is nonresponsive.

25. LOBBYING

"Lobbying shall be prohibited on all county competitive selection processes and purchasing contract awards pursuant to this division, including, but not limited to, requests for proposals, requests for quotations, requests for qualifications, bids or the award of purchasing contracts of any type. The purpose of this prohibition is to protect the integrity of the procurement process by shielding it from undue influences prior to the contract award, or the competitive selection

SECTION A - GENERAL CONDITIONS

process is otherwise concluded. However, nothing herein shall prohibit a prospective bidder/proposer/protestor from contacting the purchasing department or the county attorney's office to address situations such as clarification and/or pose questions related to the procurement process.

Lobbying of evaluation committee members, county government employees, elected/appointed officials, or advisory board members regarding requests for proposals, requests for quotations, requests for qualifications, bids, or purchasing contracts, by the bidder/proposer, any member of the bidder's/proposer's staff, any agent or representative of the bidder/proposer, or any person employed by any legal entity affiliated with or representing a bidder/proposer/protestor, is strictly prohibited from the date of the advertisement, or on a date otherwise established by the board, until either an award is final, or the competitive selection process is otherwise concluded. Any lobbying activities in violation of this section by or on behalf of a bidder/proposer shall result in the disqualification or rejection of the proposal, quotation, statement of qualification, bid or contract.

For purposes of this provision, "lobbying" shall mean influencing or attempting to influence action or non-action, and/or attempting to obtain the goodwill of persons specified herein relating to the selection, ranking, or contract award in connection with any request for proposal, request for quotation, request for qualification, bid or purchasing contract through direct or indirect oral or written communication. The final award of a purchasing contract shall be the effective date of the purchasing contract.

Any evaluation committee member, county government employee, elected/appointed official, or advisory board member who has been lobbied shall immediately report the lobbying activity to the director."

(Ord. No. 02-35, 5-7-02; Ord. No. 04-64, § 12, 9-21-04; Ord. No. 04-87, § 1, 12-7-04; Ord. No. 10-09, § 6, 2-16-10; Ord. No. 11-23, § 2, 7-26-11; Ord. No. 14-11, § 5, 2-11-14; Ord. No. 18-34, 10-23-18).

26. PROTEST PROCEDURE

As per Section 2-162 of County Code

- a. Right to Protest. "A vendor who is aggrieved by the contents of the bid or proposal package, or a vendor who is aggrieved in connection with the recommended award on a bid or proposal solicitation, may file a written protest to the director, as provided herein. This right to protest is strictly limited to those procurements of goods and/or services solicited through invitations to bid or requests for proposals, including solicitations pursuant to F.S. § 287.055, the "Consultants' Competitive Negotiation Act." No other actions or recommendations in connection with a solicitation can be protested, including: (i) requests for quotations, negotiations, qualifications or letters of interest; (ii) rejection of some, all or parts of bids or proposals; (iii) disqualification of bidders or proposers as non-responsive or non-responsible; or (iv) recommended awards less than the mandatory bid or proposal amount. Protests failing to comply with the provisions of this section shall not be reviewed."
- b. "Posting. The purchasing department shall post the recommended award on or through the departmental website."
- c. Requirements to protest.
 1. "If the protest relates to the content of the bid or proposal package, a formal written protest must be filed no later than 5:00 p.m. EST on the fifth full business day after issuance of the bid or proposal package."
 2. "If the protest relates to the recommended award of a bid or proposal, a formal written protest must be filed no later than 5:00 p.m. EST on the fifth full business day after posting of the award recommendation."
 3. "The formal written protest shall identify the protesting party and the solicitation involved; include a statement of the grounds on which the protest is based; refer to the statutes, laws, ordinances 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."
 4. "A formal written protest is considered filed with the county when the purchasing department receives it. Accordingly, a protest is not timely filed unless it is received within the time specified above by the purchasing department. 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 bidder or proposer."

SECTION A - GENERAL CONDITIONS

- d. "Sole remedy. These procedures shall be the sole remedy for challenging the content of the bid or proposal package or the recommended award."
- e. "Lobbying. Protestors and anyone acting on their behalf, are prohibited from attempts to influence, persuade, or promote a bid or proposal protest through any other channels or means, and contacting any county official, employee, advisory board member, or representative to discuss any matter relating in any way to the solicitation being protested, other than the purchasing department's or county attorney's office to address situations such as clarification and/or pose questions related to the procurement process. The prohibitions provided for herein shall begin with the filing of the protest and end upon the final disposition of the protest; provided, however, at all times protestors shall be subject to the procurement lobbying prohibitions in section 2-189 of this Code. Failure to adhere to the prohibitions herein shall result in the rejection of the protest without further consideration."
- f. "Time limits. The time limits in which protests must be filed as specified herein may be altered by specific provisions in the bid or proposal."
- g. "Authority to resolve. The director shall resolve the protest in accordance with the documentation and applicable legal authorities and shall issue a written decision to the protestor no later than 5:00 p.m. EST on the tenth full business day after the filing thereof."
- h. "Review of director's decision."
 - 1. "The protesting party may request a review of the director's decision to the county administrator by delivering written request for review of the decision to the director by 5:00 p.m. EST on the fifth full business day after the date of the written decision. The written notice shall include any materials, statements, and arguments which the bidder or proposer deems relevant to the issues raised in the request to review the decision of the director."
 - 2. "The county administrator shall issue a decision in writing stating the reason for the action with a copy furnished to the protesting party no later than 5:00 p.m. EST on the seventh full business day after receipt of the request for review. The decision shall be final and conclusive as to the county unless a party commences action in a court of competent jurisdiction."
- i. "Stay of procurement during protests. There shall be no stay of procurement during protests."

(Ord. No. 94-51, § 5, 6-7-94; Ord. No. 04-87, § 1, 12-7-04; Ord. No. 14-11, § 2, 2-11-14; Ord. No. 18-34, 10-23-18)

27. PUBLIC RECORDS – CONTRACTOR'S DUTY

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 agreement, the contractor shall contact:

Pinellas County Board of County Commissioners

Purchasing and Risk Management Division

400 S. Ft. Harrison Ave, 6th Floor,

Clearwater, FL 33756

Public Records Liaison

Phone: 727-464-4485

Email: jpeters@pinellascounty.org

SECTION A - GENERAL CONDITIONS**28. E-VERIFY**

The contractor and subcontractor must register with and use the E-verify system in accordance with Florida Statute 448.095. A contractor and subcontractor may not enter into a contract with the County unless each party registers with and uses the E-verify system.

If a contractor enters a contract with a subcontractor, the subcontractor must provide the contractor with an affidavit stating that the Subcontractor does not employ, contract with, or subcontract with unauthorized aliens. The contractor must maintain a copy of the affidavit for the duration of the contract.

If the County, Contractor, or Subcontractor has a good faith belief that a person or entity with which it is contracting has knowingly violated Florida Statute 448.09(1) shall immediately terminate the contract with the person or entity.

If the County has a good faith belief that a Subcontractor knowingly violated this provision, but the Contractor otherwise complied with this provision, the County will notify the Contractor and order that the Contractor immediately terminate the contract with the Subcontractor.

A contract terminated under the provisions of this section is not a breach of contract and may not be considered such. Any contract termination under the provisions of this section may be challenged to Section 448.095(2)(d), Florida Statute. Contractor acknowledges upon termination of this agreement by the County for violation of this section by Contractor, Contractor may not be awarded a public contract for at least one (1) year. Contractor acknowledges that Contractor is liable for any additional costs incurred by the County as a result of termination of any contract for a violation of this section.

Contractor or Subcontractor shall insert in any subcontracts the clauses set forth in this section, requiring the subcontracts to include these clauses in any lower tier subcontracts. Contractor shall be responsible for compliance by any Subcontractor or Lower Tier Subcontractor with the clause set forth in this section.

29. INDEPENDENT CONTRACTOR STATUS AND COMPLIANCE WITH THE IMMIGRATION REFORM AND CONTROL ACT OF 1986

Contractor acknowledges that it is functioning as an independent contractor in performing under the terms of this agreement, and it is not acting as an employee of Pinellas County. The contractor acknowledges that it is responsible for complying with the provisions of the Immigration Reform and Control Act of 1986, located at 8 U.S.C. Section 1324, et seq., and regulations relating thereto. Failure to comply with the above provisions of the agreement shall be considered a material breach and shall be ground for immediate termination of the agreement.

30. TRUTH IN NEGOTIATIONS:

The contractor certifies to truth-in-negotiation and that wage rates and other factual unit costs supporting the compensation are accurate, complete and current at the time of contracting. Further, the original agreement amount and any additions thereto shall be adjusted to exclude any significant sums where the County determines the agreement price was increased due to inaccurate, incomplete or non-current wage rates and other factual unit costs. Such adjustments must be made within one (1) year following the end of the agreement.

SECTION B – SPECIAL CONDITIONS

SECTION B – SPECIAL CONDITIONS

1. INTENT

In accordance with attached specifications, it is the intent of Pinellas County to establish a contract for **Public Information and Outreach Consulting Services - Utilities**, as and when required.

2. PROPOSAL REQUIREMENTS

Each proposal shall at a minimum address and/or include the following information and documentation in sufficient detail for the County to evaluate the Proposer’s qualifications, as well as the methods, manner, proposed completion schedule if applicable, and the cost to complete the Section E Scope of Work:

- a. A separate statement describing the Proposer’s qualifications and experience in providing the same or similar services as outlined in the RFP Scope of Work. This description should include the names of the person(s) who will provide the services, including any subcontractors, their qualifications, and the years of experience in performing this type of work/services. Also include the reference information requested in Section D.
- b. A separate written narrative describing the methods and/or manner in which the Proposer proposes to satisfy the requirements of the Scope of Work set out in Section E.
- c. A separate proposed Statement of Work (Proposer’s Statement of Work) that enumerates and defines the work/services that Proposer will provide to the County to complete the Scope of Work in this RFP, including each task, deliverable, and/or goods or products comprising the services Proposer will provide, as well as a proposed completion schedule for each task or deliverable, if applicable. The Proposer’s Statement of Work shall be in a form that can be incorporated into the Services Agreement as an Exhibit at the County’s option. ATTACHMENT A – Services Agreement
- d. The proposed compensation to be paid by the County for the services identified in the Proposer’s Statement of Work required in subsection 2(c) above. Proposer shall complete Section F – Fee Schedule (EXCEL) – Attachment H
- e. Any exceptions to any section of this RFP.

3. PRICING/PERIOD OF CONTRACT

Unit prices bid of listed items shall be held firm for the duration of the contract. Duration of the contract shall be for a period of **(12) month(s)** from the date of contract award and any extension thereof.

4. TERM EXTENSION(S) OF CONTRACT

The contract may be extended subject to written notice of agreement from the County and successful bidder, for **(1)** additional **(12)** month(s) extension(s) beyond the primary contract period. The extension shall be exercised only if all prices, terms and conditions remain the same and approval is granted by the County Administrator or Director of Purchasing.

5. FEES AND EXPENSES

The agreed to compensation will include all standard day-to-day administrative, overhead and internal expenses; including, but not limited to:

Costs of bonds and insurance premiums as required by this RFP	Computer/software
Support	Equipment and usage
Office supplies	Telephone charges
Safety equipment	Emails
Consumables	Electronic data transmission fees
Other consulting services	Standard copier usage

SECTION B – SPECIAL CONDITIONS

Special presentations	Fax charges
Regular and certified postage	Travel, per diem and lodging charges, unless otherwise agreed to by the county in the services agreement

Travel and lodging expenses will be included in the lump sum proposal.

6. PRE-CONFERENCE

NOT APPLICABLE

7. SITE VISIT

NOT APPLICABLE

8. PRE-COMMENCEMENT MEETING

Upon award of bid, the County will coordinate a pre-commencement meeting with the successful Contractor. The meeting will require Contractor and the County Representative to review specific contract details and deliverable documents at this meeting to ensure the scope of work and work areas are understood.

9. PERFORMANCE SECURITY

NOT APPLICABLE

10. PROPOSAL SUBMITTAL COPIES

The preferred method is PDF conversion from the Proposer’s source files (to minimize file size and maximize quality and accessibility) rather than scanning.

Instructions for Providing Files in PDF Format to Pinellas County Government

How do I convert my files to PDF format?

Answer - If you have a program such as Adobe Acrobat, creating a PDF of any file is a simple print function. Rather than printing to a traditional printer, the file converts to a PDF format copy of your original. Any program (such as Word, PowerPoint, Excel, etc.) can be converted this way by simply selecting the print command and choosing PDF as the printer.

Should I scan everything and save as PDF?

Answer - Not unless you are scanning with OCR (optical character recognition). Scanning will create unnecessarily large files because a scan is just a picture of a page rather than actual page text. Furthermore, the result of scanning is that your pages will not look nearly as “clean” or professional as simply using the print to PDF method from the program from which the file originates. Additionally, since scan pages are pictures of text, not really text, they may not be considered accessible* under Federal ADA guidelines (*unless the scans are OCR.)

11. BREACH OF CONTRACT

Failure of Contractor to perform any of the services required by this contract within 10 days of receipt of written demand for performance from the County shall constitute breach of contract.

SECTION C – INSURANCE REQUIREMENTS**SECTION C – INSURANCE AND INDEMNIFICATION REQUIREMENTS****1. LIMITATIONS ON LIABILITY**

By submitting a Proposal, the Vendor acknowledges and agrees that the services will be provided without any limitation on the Vendor's liability. The County objects to and shall not be bound by any term or provision that purports to limit the Vendor's liability to any specified amount in the performance of the services. The Vendor shall state any exceptions to this provision in its response, including specifying the proposed limits of liability in the stated exception to be included in the Services Agreement. The Vendor is deemed to have accepted and agreed to provide the services without any limitation on the Vendor's liability that the Vendor does not take exception to in its response. Notwithstanding any exceptions by the Vendor, the County reserves the right to declare its prohibition on any limitation on the Vendor's liability as non-negotiable, to disqualify any Proposal that includes exceptions to this prohibition on any limitation on the Vendor's liability, and to proceed with another responsive, responsible proposal, as determined by the County in its sole discretion.

2. INDEMNIFICATION

Vendor agrees to indemnify, pay the cost of defense, including attorney's fees, and hold harmless the County, its officers, employees and agents from all damages, suits, actions or claims, including reasonable attorney's fees incurred by the County, of any character brought on account of any injuries or damages received or sustained by any person, persons, or property, or in any way relating to or arising from the Agreement; or on account of any act or omission, neglect or misconduct of Contractor; or by, or on account of, any claim or amounts recovered under the Workers' Compensation Law; or of any other laws, regulations, ordinance, order or decree; or arising from or by reason of any actual or claimed trademark, patent or copyright infringement or litigation based thereon; or for any violation of requirements of the Americans with Disabilities Act of 1990, as may be amended, and all rules and regulations issued pursuant thereto (collectively the "ADA") except when such injury, damage, or violation was caused by the sole negligence of the County.

3. INSURANCE:

The Vendor must provide a certificate of insurance and endorsement in accordance with the insurance requirements listed below, prior to recommendation for award.

The Vendor shall obtain and maintain and require any subcontractor to obtain and maintain, at all times during its performance of the Agreement, insurance of the types and in the amounts set forth. For projects with a Completed Operations exposure, Vendor shall maintain coverage and provide evidence of insurance for two (2) years beyond final acceptance. All insurance policies shall be from responsible companies duly authorized to do business in the State of Florida and have an AM Best rating of A- VIII or better.

A. Submittals should include, the Vendor's current Certificate(s) of Insurance. If Vendor does not currently meet insurance requirements, Vendor shall also include verification from their broker or agent that any required insurance not provided at that time of submittal will be in place prior to the award of contract.

Upon selection of Vendor for award, the selected Vendor shall email certificate that is compliant with the insurance requirements. If the certificate received is compliant, no further action may be necessary. The Certificate(s) of Insurance shall be signed by authorized representatives of the insurance companies shown on the Certificate(s). **The Certificate holder section shall indicate Pinellas County, a Subdivision of the State of Florida, 400 S Fort Harrison Ave, Clearwater, FL 33756. Pinellas County shall be named as an Additional Insured for General Liability. A Waiver of Subrogation for Workers Compensation shall be provided if Workers Compensation coverage is a requirement.**

B. Approval by the County of any Certificate(s) of Insurance does not constitute verification by the County that the insurance requirements have been satisfied or that the insurance policy shown on the Certificate(s) of Insurance is in compliance with the requirements of the Agreement. The County reserves the right to require a certified copy of the entire insurance policy, including endorsement(s), at any time during the RFP and/or contract period.

C. If any insurance provided pursuant to the Agreement expires or cancels prior to the completion of the work you will be notified by CTrax, the authorized Vendor of Pinellas County. Upon notification, renewal certificate(s) of Insurance and endorsement(s) should be furnished to Pinellas County Risk Management at InsuranceCerts@pinellascounty.org and to CTrax c/o JDi Data at PinellasSupport@jdidata.com by the Vendor or their agent prior to the expiration date.

SECTION C – INSURANCE REQUIREMENTS

- 1) The Vendor shall also notify the County within twenty-four (72) hours after receipt, of any notices of expiration, cancellation, nonrenewal or adverse material change in coverage received by said Vendor from its insurer. Notice shall be given by email to Pinellas County Risk Management at InsuranceCerts@pinellascounty.org. Nothing contained herein shall absolve Vendor of this requirement to provide notice.
 - 2) Should the Vendor, at any time, not maintain the insurance coverages required herein, the County may terminate the Agreement.
- D. If subcontracting is allowed under this RFP, the Primary Vendor shall obtain and maintain, at all times during its performance of the Agreement, insurance of the types and in the amounts set forth; and require any Subcontractors to obtain and maintain, at all times during its performance of the Agreement, insurance limits as it may apply to the portion of the Work performed by the Subcontractor; but in no event will the insurance limits be less than \$500,000 for Workers' Compensation/Employers' Liability, and \$1,000,000 for General Liability and Auto Liability if required below.

All subcontracts between the Vendor and its Subcontractors shall be in writing and are subject to the County's prior written approval. Further, all subcontracts shall

- 1) Require each subcontractor to be bound to the Vendor to the same extent the Vendor is bound to the County by the terms of the Contract Documents, as those terms may apply to the portion of the Work to be performed by the subcontractor.
 - 2) Provide for the assignment of the subcontracts from the Vendor to the County at the election of Owner upon termination of the contract;
 - 3) Provide that County will be an additional indemnified party of the subcontract;
 - 4) Provide that the County will be an additional insured on all insurance policies required to be provided by the Subcontractor except workers compensation and professional liability;
 - 5) Provide a waiver of subrogation in favor of the County and other insurance terms and/or conditions as outlined below;
 - 6) Assign all warranties directly to the County; and
 - 7) Identify the County as an intended third-party beneficiary of the subcontract. The Vendor shall make available to each proposed Subcontractor, prior to the execution of the subcontract, copies of the Contract Documents to which the Subcontractor will be bound by this Section C and identify to the Subcontractor any terms and conditions of the proposed subcontract which may be at variance with the Contract Documents.
- E. Each insurance policy and/or certificate shall include the following terms and/or conditions:
- 1) The Named Insured on the Certificate of Insurance and insurance policy must match the entity's name that responded to the solicitation and/or is signing the agreement with the County.
 - 2) Companies issuing the insurance policy, or policies, shall have no recourse against County for payment of premiums or assessments for any deductibles which all are at the sole responsibility and risk of Vendor.
 - 3) The term "County" or "Pinellas County" shall include all Authorities, Boards, Bureaus, Commissions, Divisions, Departments and Constitutional offices of County and individual members, employees thereof in their official capacities, and/or while acting on behalf of Pinellas County.
 - 4) All policies shall be written on a primary, non-contributory basis.

The minimum insurance requirements and limits for this Agreement, which shall remain in effect throughout its duration and for two (2) years beyond final acceptance for projects with a Completed Operations exposure, are as follows:

SECTION C – INSURANCE REQUIREMENTS

- 1) **Workers’ Compensation Insurance:** Worker’s Compensation Insurance is required if required pursuant to Florida law. If, pursuant to Florida law, Worker’s Compensation Insurance is required, employer’s liability, also known as Worker’s Compensation Part B, is also required in the amounts set forth herein

Limits

Employers’ Liability Limits	Florida Statutory
Per Employee	\$ 500,000
Per Employee Disease	\$ 500,000
Policy Limit Disease	\$ 500,000

If Vendor/Contractor is not required by Florida law, to carry Workers Compensation Insurance in order to perform the requirements of this Agreement, County Waiver Form for workers compensation must be executed, submitted, and accepted by Risk Management. Failure to obtain required Worker’s Compensation Insurance without submitting and receiving a waiver from Risk Management constitutes a material breach of this Agreement.

- 2) **Commercial General Liability Insurance:** including, but not limited to, Independent Vendor, Contractual Liability Premises/Operations, Products/Completed Operations, and Personal Injury.

Limits

Each Occurrence or Claim	\$ 1,000,000
General Aggregate	\$ 2,000,000

For acceptance of Professional Liability coverage included within another policy required herein, a statement notifying the certificate holder must be included on the certificate of insurance and the total amount of said coverage per occurrence must be greater than or equal to the amount of Professional Liability and other coverage combined.

- 3) **Property Insurance:** Vendor will be responsible for all damage to its own property, equipment and/or materials.

SECTION D – VENDOR REFERENCES

SECTION D – CONTRACTOR REFERENCES

THE FOLLOWING INFORMATION IS REQUIRED IN ORDER THAT YOUR PROPOSAL MAY BE REVIEWED AND PROPERLY EVALUATED.

COMPANY NAME: _____

LENGTH OF TIME COMPANY HAS BEEN IN BUSINESS: _____

BUSINESS ADDRESS: _____

HOW LONG IN PRESENT LOCATION: _____

TELEPHONE NUMBER: _____

FAX NUMBER: _____

TOTAL NUMBER OF CURRENT EMPLOYEES: _____ FULL TIME _____ PART TIME

NUMBER OF EMPLOYEES YOU PLAN TO USE TO SERVICE THIS CONTRACT: _____

All references will be contacted by a County Designee via email, fax or phone call to obtain answers to questions, as applicable before an evaluation decision is made.

Bidders must have experience in work of the same or similar nature, and must provide references that will satisfy the County. Proposer must furnish a reference list of at least four (4) customers for whom they have performed similar services.

EITHER LOCAL COMMERCIAL OR GOVERNMENTAL REFERENCE(S) (PINELLAS COUNTY GOVERNMENT REFERENCES WILL NOT BE ACCEPTED) THAT YOU HAVE PREVIOUSLY PERFORMED SIMILAR CONTRACT SERVICES FOR:

1.	2.
COMPANY:	COMPANY:
ADDRESS:	ADDRESS:
TELEPHONE/FAX:	TELEPHONE/FAX:
CONTACT:	CONTACT:
CONTACT EMAIL:	CONTACT EMAIL:
COMPANY EMAIL ADDRESS:	COMPANY EMAIL ADDRESS:
3.	4.
COMPANY:	COMPANY:
ADDRESS:	ADDRESS:
TELEPHONE/FAX:	TELEPHONE/FAX:
CONTACT:	CONTACT:
CONTACT EMAIL:	CONTACT EMAIL:
COMPANY EMAIL ADDRESS:	COMPANY EMAIL ADDRESS:

SECTION E – SCOPE OF WORK**SECTION E – SCOPE OF WORK****A. OBJECTIVE:**

The Pinellas County Utilities Department ("PCU") is seeking to obtain services for Utilities Public Information and Outreach to provide public relations, information, community outreach, and both internal and external communication services. External communications will encompass a variety of topics including rates, fees, capital projects, water quality, reclaimed water rate changes, conservation programs, emerging contaminants, biosolids management, workforce development programs, private sewer lateral programs, septic to sewer conversion programs, lead and copper rule implementation, as well as many other highly technical and complex initiatives. Additional support will be required in the development of policy communication plans, board presentations and handouts, and public event coordination. Internal department communication programs will be in alignment with the PCU strategic communications and implementation plan including monthly staff newsletters, quarterly department meetings, strategic planning workshop facilitation, webinars, and other related media. Successful performance of services will include fostering public trust and confidence in PCU, addressing timely issues related to water, wastewater, and reclaimed water service, capital improvement, strategic initiatives, comprehensive public relations campaigns, and emergency response, and promoting the water and wastewater industry. ATTACHMENT B – PCU 2020-2025 Strategic Plan ATTACHMENT C – Strategic Communication, Implementation & Monitoring Plan 2020-2025.

B. BACKGROUND:

PCU seeks a trusted and proven Consultant with significant experience and background in the water and wastewater industry, to share PCU's strategic vision for the future of water, wastewater, and reclaimed water systems in the PCU service area. PCU has several bold, transformative initiatives and capital improvement projects in the next decade. Nurturing public confidence, building support, and informing our customer base are essential components of a successful future.

C. SCOPE OF WORK: Consultant shall at a minimum provide the following:

1. The consultant must have significant industry knowledge pertaining to water, wastewater, and reclaimed water systems and regulations in order to prepare and recommend education and outreach programs that will foster the stated objective. The consultant will evaluate the current organizational needs and customer base and proactively recommend various options and alternatives to bolster and further the department priorities and initiatives. The consultant will not rely solely on PCU to provide direction, rather the consultant will provide needed expertise to integrate into the organization in a manner that allows value-added services and innovative ideas and methods.
2. All deliverables must go through a quality control process by the consultant prior to delivery to PCU for review. All deliverables must be free from careless errors and erroneous information such as grammar, punctuation, spelling, page numbering and dates. All technical information including facts, figures, numbers, quantities will be double-checked and reviewed by the consultant for accuracy prior to submitting to PCU.
3. All meetings between PCU and the consultant will have meeting notes with clear actions items outlining any direction provided by PCU leadership. The consultant will follow up in a timely manner on any action items and provide a concise written update with the "bottom-line up-front approach" to the parties involved.
4. PowerPoint development will include significant attention towards visual aids such as charts, graphs, and pictures that present and disseminate the information professionally, logically, well-thought out and articulated as to the message and the intended audience. Supporting documents such as handouts will be thorough and concise with technical language minimized and information condensed so that decision-makers can have clear information to make a decision. Talking points to accompany any presentation will be clearly articulated with attention to detail and audience. Back up facts, figures and other potential information may be needed to be included in any talking points deliverable. ATTACHMENT D
5. Media inquires on any potential topic will require swift response for the development of talking points for the appropriate staff member (director, deputy director, division director, manager, coordinator, etc.). The consultant should be well-versed enough on county operations to develop these independently with minimal staff involvement. The consultant must have significant expertise in the areas of a utility department in order to deliver and provide the support needed. The consultant must be well-versed in providing detailed media training to staff to prepare managers and staff for live and pre-recorded media interviews.

SECTION E – SCOPE OF WORK

6. The consultant must have significant expertise regarding public meeting management. Including state and local policies pertaining to meeting requirements including public notices, comments or other requirements depending on the scope and objective of the meeting. The consultant will be able to develop public meeting plans, sometimes in collaboration with community stakeholders, to develop a detailed agenda that will ensure timely meetings, appropriate stakeholder notifications and media promotions, coordinated activities and speakers, incorporation of logistical details such as seating, parking, food and security. The consultant should be able to do this independently, with minimal guidance by PCU. Plans will be developed well in advance of the event/meeting date.
7. The consultant will be able to provide audio-visual deliverables including professional videos that involve PCU staff interviews, operations and projects. The consultant should be well-versed in videotaping, editing and all aspects related to the development of educational videos. The consultant may be responsible for coordinating the dissemination videos through social media, website and other platforms in coordination with PCU and the Communications department.
8. The consultant will be required to develop and provide performance measures related to any and all public outreach campaigns or programs. It is the consultant's responsibility to develop the performance measure and develop tools to track and monitor performance throughout the duration of the program. Program measures should be delivered to PCU on a regular basis depending on the particular scope and duration of the program. The consultant will provide analysis of the measures and recommended strategies to shift and modify methods if targets measures are not being met.
9. Consultant shall adhere to writing standards that the general public may easily understand in compliance with The Associated Press Stylebook and Briefing on Media Law, the public information officer (PIO) industry standard.
10. Consultant must demonstrate experience creating strategic communications plans that focus on the end-user outcomes (a strategic communications plan example should be provided).
11. The hours Consultant is to work on any given day will be entirely within Consultant's control. Consultant shall work the number of hours necessary to fulfill its duties to perform the services required with due diligence, professionally and competently to the best of its ability. Further, unless otherwise provided in the assignment, Consultant shall set forth a schedule for performing the services required. The Consultant, as a result, agrees to adhere to the schedule, and the Consultant acknowledges and agrees that time is of the essence with respect to its performance under this Agreement.
12. Consultant must have effective liaison capabilities with PCU. Consultant will participate in PCU meetings and collaborate on campaigns requiring mass outreach including:
 - a) Consultant must prepare and furnish to PCU an electronic copy of each completed deliverable in a compatible Office 365 Microsoft Suite format
 - b) If requested, prepare, and furnish five (5) copies of completed deliverables to PCU.
 - c) If requested by PCU, Consultant shall present via Teams Meeting, Zoom, or in-person to PCU management.
13. Consultant must use American Disabilities Act (ADA) compliant document creation. To comply with the ADA, documents posted online, including, but not limited to, Adobe PDF files, Microsoft Word documents, Microsoft PowerPoint presentations, and online flipbooks, must be screen reader friendly. ATTACHMENT E
14. Consultant shall provide after-hours access and responsiveness before, during, and after a public emergency, disaster, hurricane, tornado, boil water notifications, Sanitary Sewer Overflows (SSO), flood, and other emergency incidents as declared by PCU. PCU shall require a "First Priority" for Assignments and services. It is vital and imperative that the citizens are protected from any emergency that threatens public health and safety, as determined by PCU. Consultant agrees to prioritize all Assignments and services to PCU on a "first-priority" basis for all services rendered or contracted. In the event of a disaster, emergency, hurricane, tornado, boil water notifications, Sanitary Sewer Overflows (SSO), flood, or any other emergency as defined by PCU. Consultant shall serve as the first point of contact for media inquiries after consulting with PCU for guidance on the response details. Consultant shall provide PCU a point of contact if PCU has questions for the Consultant prior to the Consultant's response to the media inquiry.
15. Consultant shall work with PCU to clarify and define PCU's requirements relative to each assignment and obtain and review all available data. Consultant must schedule communications plans and products with PCU Communications liaison. PCU will remain the primary link to media, including disseminating news releases and receiving inquiries.
16. Consultant must adhere to social media content creation in accordance with the Pinellas County Social Media Guidelines. Consultants will not be allowed to post to PCU accounts. ATTACHMENT F
17. Consultant must adhere to Pinellas County Branding Guidelines. PCU Marketing shall lead graphic design consultation and provide final approval on new branded content requests. ATTACHMENT G

SECTION E – SCOPE OF WORK

18. Consultant has represented to PCU that Consultant has special expertise in the type of professional services provided according to this scope of work. Consultant acknowledges that such representations were a material inducement to PCU to enter into an Agreement with Consultant. Consultant shall promote the best interest of PCU and assume towards PCU a relationship of trust, confidence, and fair dealing.
19. Consultant must provide the following items on a schedule to be determined by PCU, when and as needed, hourly rates enumerating costs for the following services:
 - a) Emergency Communications
 - b) Neighborhood outreach program
 - c) Tri-fold flyer
 - d) PowerPoint Presentation
 - e) Posterboard display
 - f) Press release
 - g) Public outreach campaign
 - h) Social media posts
 - i) Graphic Design
 - j) Other marketing and communications services agreed upon by PCU and Consultant to achieve project communication goals.
20. Consultant must communicate with PCU at least once a month and, more often, when necessary, report on progress and performance as part of ongoing evaluation. Consultant will provide proven performance measurement methods for ascertaining successful market penetration and message deployment to the target audience, to include, for example:
 - a) Metric and data to support audience penetration
 - b) Message effectiveness
 - c) Impact
 - d) Return on investment (ROI)

D. BACKGROUND CHECKS:Security Requirements / Background Checks/ Identification Badges:

All Consultant employees are required to submit to a background check. The background check process shall be completed at least ten (10) days prior to the start of the project. The Consultant shall be responsible for all costs associated with the background checks. A valid driver's license and Social Security card are required for completing the background check and obtaining a security clearance.

Step One – The Consultant shall obtain a Level One Criminal History Records Check through the Florida Department of Law Enforcement (FDLE) for each assigned employee.

Step Two – The Consultant shall submit the FDLE Records Check along with a copy of the driver's license, Social Security card, and completed Sheriff's Office Security Clearance Application, for each employee, to the Facility Manager.

The Pinellas County Sheriff's Office shall have and exercise full and complete control over granting, denying, withholding, withdrawing or terminating security clearances for consultant employees.

If a submitted employee is denied for any reason, there is no opportunity to re-apply.

E. ON-SITE COUNTY CONDUCT:

In the performance of all services under this Agreement, Consultant may require its property and/or employees, subcontractors, consultants or other agents to go upon County's property and be in proximity of County's employees and Consultants. Consultant agrees that in doing so, proper precautions will be taken to carry on its operations in a safe, competent, and professional manner at all times, both in performing the services under this Agreement and in entering and leaving County's property. Neither Consultant nor its employees, subcontractors, consultants or other agents shall permit or enable any unnecessary person to enter County's premises, nor permit or enable to enter County's premises any person County has requested be removed from and precluded from entering County's premises, whether for reasons of security of persons, property or information. Consultant shall require its

SECTION E – SCOPE OF WORK

employees, subcontractors, consultants, and other agents to comply with the County's policies and procedures concerning entry, exit, and conduct upon the County's premises, including background screening and use of security badges or access cards if required by County. Consultant shall not permit any person to obtain or retain possession of any access card or device beyond the conclusion of the work or otherwise beyond the duration of County's express authorization. Consultant shall obtain appropriate background checks on all of Consultant's employees, agents or consultants prior to their entry on Pinellas County premises. All subcontractors are held to the same standard relating to their employees, agents or consultants performing services County's premises.

In all instances, Consultant shall honor requests for immediate removal of Consultant's employees, subcontractors, consultants, agents, etc. in instances deemed to involve a conflict of interest, or for any other reason(s) deemed to be in County's best interest, at County's sole reasonable discretion.

1. Computer Usage Policy:

In all instances when Consultants are using or connecting to Pinellas County computer systems, Pinellas County expects that the highest level of discretion and caution be used in ensuring the security of Pinellas County's systems.

In addition, when using or connecting to any Pinellas County systems, Pinellas County expects that good judgment and professionalism be used as relates to email and/or internet activity to ensure all Pinellas County systems are utilized in a legal and ethical manner.

Further, Pinellas County's expectation is that all Pinellas County systems be used solely for the purpose authorized and intended based upon the nature of services provided to Pinellas County by the Consultant.

The above applies to all Consultants using or accessing Pinellas County computers, including those that may be using privately owned computers or systems to access Pinellas County systems resources. Pinellas County systems resources include any computers, workstations, hand-held computing devices, servers, and networks provided or supported by Pinellas County and the information, software programs and utilities stored on or created by them.

Any violation of the above may be viewed as a breach of Agreement at the sole discretion of Pinellas County.

2. Cyber Security:

The Consultant, and its subsidiaries are required to have taken all technical and organizational measures necessary to protect the information technology systems and data used in connection with the operation of the Consultant, its subsidiaries' businesses. Without limiting the foregoing, the Consultant, its subsidiaries have used reasonable efforts to establish and maintain, and have established, maintained, implemented, and complied with, reasonable information technology, information security, cyber security, and data protection controls, policies and procedures, including oversight, access controls, encryption, technological and physical safeguards and business continuity/disaster recovery and security plans that are designed to protect against and prevent a breach, destruction, loss, unauthorized distribution, use, access, disablement, misappropriation or modification, or other compromise or misuse of or relating to any information technology system or data used in connection with the operation of the Consultant, its subsidiaries' businesses ("Breach"). There has been no such Breach, and the Consultant, its subsidiaries have not been notified of and have no knowledge of any event or condition that would reasonably be expected to result in, any such Breach. Should a breach occur the Consultant, its subsidiaries will notify Pinellas County immediately.

SECTION E – SCOPE OF WORK

i. **EVALUATION CRITERIA:**

Listed below are the criteria that will be used by the County to evaluate and score responsive proposals. Proposers shall include sufficient information to allow the County to thoroughly evaluate and score their proposals. Each proposal submitted shall be evaluated and ranked by an evaluation committee. The contract will be awarded to the most qualified proposer, per the following evaluation criteria:

1. Qualifications (400 Points)

A separate statement describing the Proposer's qualifications and experience in providing the same or similar services as outlined in the RFP Scope of Work. This description should include the names of the person(s) who will provide the services, including any subcontractors, their qualifications, and the years of experience in performing this type of work/services.

- a) Company Background/History - Provide relevant experience of Utilities Public Information and Outreach Consulting Services described herein. Experience and qualifications shall be defined as a minimum of five years of water and wastewater utility service experience with governmental municipalities with a customer base of 100,000 plus customers. Detail experience with large-scale water/wastewater capital improvement efforts, water/wastewater public relations campaigns, natural disasters, utility failures, emergencies, and unforeseen events.
- b) Resumes – Provide resumes of key staff members (Account Manager, Communications Manager, etc.) responsible for the performance of any contract resulting from this solicitation that includes detail on qualifications and experience. Proposer should provide a minimum of five references from similar projects performed within the last three years.
- c) Identify Key Individuals – Provide key individuals assigned to include their roles and responsibilities. Include a detailed resume of the Consultant's key Project Manager, at least one substitute Project Manager, and other key individuals on the project team. The proposed Lead Manager and the proposed substitute shall have a minimum of five (5) years of relevant experience and shall remain with the projects throughout the term of the Contract. The lead Manager shall not be replaced or substituted without the prior approval of PCU. PCU may request a personal interview with the short-listed firm's proposed Managers. The lead Project Manager or approved substitutes shall be available for all meetings.
- d) References information - provide:
 - a) Client Name, address, phone number, email address, and website
 - b) Project description; comparison of project budget and final costs to the client
 - c) Comparison of the original and actual project schedule
 - d) Project dates (starting and ending)
 - e) Staff assigned to reference engagement that will be designated for work per this solicitation
 - f) Proposed project organizational chart
 - g) Identify all significant team members and their responsibilities
 - h) Demonstrate the firm's ability to work cooperatively with multiple departments and team members
 - i) Sample deliverables developed to support the client
- e) Proposer must provide proof of familiarity with county/government operations.

SECTION E – SCOPE OF WORK**2. Approach (250 Points)**

A separate written narrative describing the methods and/or manner in which the Proposer proposes to satisfy the requirements of the Scope of Work.

- a) Provide a proposed project work plan and estimated cost schedule that describes the tasks outlined in the scope of work that will be required to successfully complete the work within the deadline. The project work plan and cost schedule will show the successful completion of each assignment with the required man-hours calculated by a proposed hourly fee.
- b) Provide a schedule of time and tasks that will be requested from Pinellas County staff.
- c) Provide a schedule with key deliverable dates listed in Scope of Work

3. Statement of Work (175 Points)

A separate proposed Statement of Work that enumerates and defines the work/services that Proposer will provide to the County to complete the Scope of Work in this RFP, including each task, deliverable, and/or goods or products comprising the services Proposer will provide, as well as a proposed completion schedule for each task or deliverable, if applicable. The Proposer's Statement of Work shall be in a form that can be incorporated into the Services Agreement at the County's option.

- a) Provide a written approach to scope of work, work plan, and methodology of engagement.
- b) Provide a sample draft report detailing a similar study, analysis, and conclusions.
- c) Provide Statement of Work.

4. Compensation (150 Points)

The proposed compensation to be paid by the County for the services identified in the Statement of Work, including the methodology for determining the compensation. Proposer shall complete Section F – Fee Schedule (EXCEL) – Attachment H

5. No Exceptions to RFP (25 Points)

Proposer is advised that exceptions to any terms and conditions contained in this RFP or the Services Agreement must be stated with specificity in its response to the RFP. The points available under this criterion will be deducted if the Proposer takes exception to any language to this RFP package. Failure to provide exceptions with the submittal shall result in the mandatory acceptance of the agreement as submitted herein by default. Exceptions must be submitted on a separate sheet titled exceptions.

SECTION F – PROPOSAL SUMMARY

SECTION F – PROPOSAL SUMMARY

See Attachment H - Titled Section F Bid Submittal and Summary (Excel). Pricing must be submitted on Section F Bid Submittal and Summary.

DELIVERY _____ DAYS AFTER RECEIPT OF ORDER

An award may not be issued without proof that your firm is registered with the Florida Division of Corporations, as per Florida Statute §607.1501 www.flsenate.gov/Laws/Statutes/2011/607.1501.

A foreign corporation (foreign to the State of Florida) may not transact business in this state until it obtains a certificate of authority from the Department of State. Please visit dos.myflorida.com/sunbiz/ for this information on how to become registered.

Company Name

SECTION F – PROPOSAL SUMMARY

PROPOSAL SUBMITTAL CHECKLIST

The following checklist is included to help ensure that you include all the submittals necessary to complete a thorough evaluation of your bid response.

Items are checked if they are required with your bid submittal or if they must be on file prior to award.

Additional documentation may be requested by the County to ensure contract compliance.

√	DESCRIPTION OF SUBMITTAL	PAGE	SUBMIT WITH BID	SUBMIT PRIOR TO AWARD
	Sign the Contractor Acceptance Form	2	X	
	Current Certificate(s) of Insurance			X
	Complete the Vendor References Form	18	X	
	Section F – Bid Submittal and Summary (Excel) *note fill in General Information section in addition to Pricing	Attachment H	X	
	ePayables Form	27	X	
	W-9	28	X	
	Sign the Addenda Acknowledgement Form (if applicable)	29	X	
	Appendix 1 – E-Verify Affidavit	31	X	
	Signed sample Agreement in acknowledgment and acceptance of County terms and conditions.	Attachment A		X

ELECTRONIC PAYMENT (EPAYABLES)

ELECTRONIC PAYMENT (EPAYABLES)

The Board of County Commissioners (County) is offering faster payments. The County would prefer to make payment using credit card through the ePayables system. See above.

Would your company accept to participate in the ePayables credit card program?

Yes _____ No _____

For more information about ePayables credit card program please visit Purchasing Department website

www.pinellascounty.org/purchase/

Company Name

Signature

Printed Signature

Phone Number

Email

W-9 REQUEST FOR TAXPAYER ID NUMBER AND CERTIFICATION**W-9 REQUEST FOR TAXPAYER ID NUMBER AND CERTIFICATION*****Instructions to form W-9 available upon request**

The contractor must complete and submit to the County Form W-9 available: Through the following link:

www.irs.gov/forms-pubs/about-form-w-9

Section 119.071(5), Florida Statutes Notice:

Your Tax Identification Number (which for individuals is your social security number) is collected on Form W9 for use in filing information returns with the IRS as described more fully below. Collection of the Internal Revenue Code (26 U.S.C § 6109).

Privacy Act Notice:

Section 6109 of the Internal Revenue Code requires you to provide your correct TIN to persons who must file information returns with the IRS to report interest, dividends, and certain other income paid to you, mortgage interest you paid, the acquisition or abandonment of secured property, cancellation of debt, or contributions you made to an IRA, or Archer MSA or HAS. The IRS may also provide this information to the Department of Justice for civil and criminal litigation, and to cities, states, and District of Columbia, and U.S. possessions to carry out their tax laws. We may also disclose this information to other countries under the tax treaty, to federal and state agencies to enforce federal nontax criminal laws, or to federal law enforcement and intelligence agencies to combat terrorism.

You must provide your TIN whether or not you are required to file a tax return. Payers must generally withhold 28% of taxable interest, dividend, and certain other payments to a payee who does not give a TIN to a payer.

SECTION G - ADDENDUM

SECTION G - ADDENDUM

PLEASE ACKNOWLEDGE RECEIPT OF ADDENDA FOR THIS SOLICITATION BY SIGNING AND DATING BELOW:

ADDENDA NO.	SIGNATURE/PRINTED NAME	DATE RECEIVED

Note: Prior to submitting the response to this solicitation, it is the responsibility of the firm submitting a response to confirm if any addenda have been issued. If such document(s) have been issued, acknowledge receipt by signature and date in section above. Failure to do so may result in response being considered non-responsive or result in lowering the rating of a firm's proposal.

Information regarding addenda issued is available on the Pinellas ePro website, www.ebids.pinellas.gov/bsol, listed under the bid attachments.

APPENDIX 1 – E-VERIFY AFFIDAVIT

SECTION H – STATEMENT OF NO BID

NOTE: If you do not intend to bid on this requirement, please complete this form. **Thank you.**

We, the undersigned have declined to submit a bid for No. 22-0478-P for Public Information and Outreach Consulting Services - Utilities.

_____ Specifications too "tight", i.e., geared toward one brand or manufacturer only (explain below).

_____ Insufficient time to respond to the Invitation to Bid.

_____ We do not offer this product or service.

_____ Our schedule would not permit us to perform.

_____ Unable to meet specifications.

_____ Unable to meet Bond requirement.

_____ Specifications unclear (explain below).

_____ Unable to Meet Insurance Requirements.

_____ Remove Us from Your "Notification List" Altogether

_____ Other (specify below).

REMARKS:

COMPANY NAME: _____

DATE: _____

SIGNATURE: _____

TYPED NAME OF ABOVE: _____

TELEPHONE: _____

FAX: _____

COMPANY EMAIL: _____

APPENDIX 1 – E-VERIFY AFFIDAVIT

APPENDIX 1 – E-VERIFY AFFIDAVIT

I hereby certify that _____ [insert contractor company name] does not employ, contract with, or subcontract with an unauthorized alien, and is otherwise in full compliance with Section 448.095, Florida Statutes.

All employees hired on or after January 1, 2021 have had their work authorization status verified through the E-Verify system.

A true and correct copy of _____ [insert contractor company name] proof of registration in the E-Verify system is attached to this Affidavit.

Signature: _____

Print Name: _____

Date: _____

Federal Work Authorization User Identification No.: _____

Name of Pinellas County Contract and Contract No.: _____

STATE OF FLORIDA COUNTY OF _____

The foregoing instrument was acknowledged before me by means of 1) physical presence __ or 2) online notarization __, this _____ (date) by _____ (name of officer or agent, title of officer or agent) of _____ (name of contractor company acknowledging), a _____ (state or place of incorporation) corporation, on behalf of the corporation. He/she is personally known to me or has produced _____ (type of identification) as identification.

[Notary Seal]

Notary Public: _____

Name typed, printed, or stamped: _____

My Commission Expires: _____

AGREEMENT

SERVICES AGREEMENT

THIS SERVICES AGREEMENT is made as of **Click or tap to enter a date.** (effective date). By and between Pinellas County, a political subdivision of the State of Florida (“County”), and _____, _____ (“Contractor”), (individually, “Party,” collectively, “Parties”).

WITNESSETH:

WHEREAS, the County requested proposals pursuant to 22-0478-P(LN) (“RFP”) for Public Information and Outreach Consulting Services - Utilities services; and

WHEREAS, based upon the County's assessment of Contractor's proposal, the County selected the Contractor to provide the Services as defined herein; and

WHEREAS, Contractor represents that it has the experience and expertise to perform the Services as set forth in this Agreement.

NOW, THEREFORE, in consideration of the above recitals, the mutual covenants, agreements, terms and conditions herein, and other good and valuable consideration, the receipt and sufficiency of which is hereby mutually acknowledged, the Parties agree as follows:

1. Definitions.

- A. **“Agreement”** means this Agreement, including all Exhibits, which are expressly incorporated herein by reference, and any amendments thereto.
- B. **“County Confidential Information”** means any County information deemed confidential and/or exempt from Section 119.07, Florida Statutes, and Section 24(a), Article 1 of the Florida Constitution, or other applicable law, including, but not limited to data or information or any other information designated in writing by the County as County Confidential Information.
- C. **“Contractor Confidential Information”** means any Contractor information that is designated as confidential and/or exempt by Florida's public records law, including information that constitutes a trade secret pursuant to Chapter 688, Florida Statutes, and is designated in this Agreement or in writing as a trade secret by Contractor (unless otherwise determined to be a public record by applicable Florida law). Notwithstanding the foregoing, Contractor Confidential Information does not include information that: (i) becomes public other than as a result of a disclosure by the County in breach of the Agreement; (ii) becomes available to the County on a non-confidential basis from a source other than Contractor, which is not prohibited from disclosing such information by obligation to Contractor; (iii) is known by the County prior to its receipt from Contractor without any obligation or confidentiality with respect thereto; or (iv) is developed by the County independently of any disclosures made by Contractor.
- D. **“Contractor Personnel”** means all employees of Contractor, and all employees of subcontractors of Contractor, including, but not limited to temporary and/or leased employees, who are providing the Services at any time during the project term.
- E. **“Services”** means the work, duties and obligations to be carried out and performed safely by Contractor under this Agreement, as described throughout this Agreement and as specifically described in the Statement of Work Exhibit attached hereto and incorporated herein by reference. As used in this Agreement, Services shall include any component task, subtask, service, or function inherent, necessary, or a customary part of the Services, but not specifically described in this Agreement, and shall include the provision of all standard day-to-day administrative, overhead, and internal expenses, including costs of bonds and insurance as required herein, labor, materials, equipment, safety equipment, products, office supplies, consumables, tools, postage, computer hardware/software, telephone charges, copier usage, fax charges, travel, lodging, and per diem and all other costs required to perform Services except as otherwise specifically provided in this Agreement.

2. Execution of Agreement

The execution of this Agreement is expressly limited by the Terms and Conditions hereon. County and the Contractor are not bound by additional provisions or provisions at variance herewith that may appear in the Contractor's quotation/estimate/scope of work or any other such related documents, acknowledgement in force, or any other communication from Contractor to or from County unless such provision is expressly set forth herein.

AGREEMENT

3. Conditions Precedent

This Agreement, and the Parties' rights and obligations herein, are contingent upon and subject to the Contractor securing and/or providing the performance security, if required in Section 3, and the insurance coverage(s) required in Section 14, within 10 days of the Effective Date. No Services shall be performed by the Contractor and the County shall not incur any obligations of any type until Contractor satisfies these conditions. Unless waived in writing by the County, in the event the Contractor fails to satisfy the conditions precedent within the time required herein, the Agreement shall be deemed not to have been entered into and shall be null and void.

4. Services

- A. **Services** - The County retains Contractor, and Contractor agrees to provide the Services. All Services shall be performed to the satisfaction of the County and shall be subject to the provisions and terms contained herein and the Exhibits attached hereto.
- B. **Services Requiring Prior Approval** - Contractor shall not commence work on any Services requiring prior written authorization in the Statement of Work without approval from Contract Administrator.
- C. **Additional Services** - From the Effective Date and for the duration of the project, the County may elect to have Contractor perform Services that are not specifically described in the Statement of Work attached hereto but are related to the Services ("Additional Services"), in which event Contractor shall perform such Additional Services for the compensation specified in the Statement of Work attached hereto. Contractor shall commence performing the applicable Additional Services promptly upon receipt of written approval as provided herein.
- D. **De-scoping of Services** - The County reserves the right, in its sole discretion, to de-scope Services upon written notification to the Contractor by the County. Upon issuance and receipt of the notification, the Contractor and the County shall enter into a written amendment reducing the appropriate Services Fee for the impacted Services by a sum equal to the amount associated with the de-scoped Services as defined in the payment schedule in this Agreement, if applicable, or as determined by mutual written consent of both Parties based upon the scope of work performed prior to issuance of notification.
- E. **Independent Contractor Status and Compliance with the Immigration Reform and Control Act** - Contractor is and shall remain an independent contractor and is neither agent, employee, partner, nor joint venturer of County. Contractor acknowledges that it is responsible for complying with the provisions of the Immigration Reform and Control Act of 1986 located at 8 U.S.C. 1324, et seq, and regulations relating thereto, as either may be amended from time to time. Failure to comply with the above provisions shall be considered a material breach of the Agreement.
- F. **Non-Exclusive Services** - Award of this Agreement imposes no obligation on the County to utilize the Contractor for all goods and/or services of this type, which may develop during the agreement period. This is a non-exclusive Agreement. During the term of this Agreement, and any extensions thereof, the County reserves the right to contract for another provider for similar goods and/or services as it determines necessary in its sole discretion.
- G. **Project Monitoring** - During the term of the Agreement, Contractor shall cooperate with the County, either directly or through its representatives, in monitoring Contractor's progress and performance of this Agreement.

5. Term of Agreement

Initial Term - The term of this Agreement shall commence on **the Effective Date** and shall remain in full force and for twelve (12) months, or until termination of the Agreement, whichever occurs first.

A. **Term Extension** -

The Parties may extend the term of this Agreement for one (1) additional twelve (12) month period(s) pursuant to the same terms, conditions, and pricing set forth in the Agreement by mutually executing an amendment to this Agreement, as provided herein.

6. Compensation and Method of Payment

- A. **Services Fee** - As total compensation for the Services, the County shall pay the Contractor the sums as provided in this Section ("Services Fee"), pursuant to the terms and conditions as provided in this Agreement. It is acknowledged and agreed by Contractor that this compensation constitutes a limitation upon County's obligation to compensate Contractor for such Services required by this Agreement but does not constitute a limitation upon Contractor's obligation to perform all of the Services required by this Agreement. In no event will the Services Fee

AGREEMENT

paid exceed the not-to-exceed sums set out in subsections below, unless the Parties agree to increase this sum by written amendment as authorized in the Amendment Section of this Agreement.

- B. **Spending Cap and Payment Structure** - The County agrees to pay the Contractor the annual not-to-exceed sum of \$_____, for Services completed and accepted herein if applicable, payable

[INSERT APPROPRIATE OPTIONS AND DELETE THE REMAINING OPTIONS]

in equal monthly payments of \$_____ beginning on the first day of the month commencing on_____, 202_____, upon submittal of an invoice as required herein.]

OR on a fixed-fee basis for the deliverables as set out in Exhibit_____, payable upon submittal of an invoice as required herein.]

the hourly rates set out in Exhibit C attached hereto, upon submittal of an invoice as required herein.

- B. **Travel Expenses** -

The Services Fee includes all travel, lodging and per diem expenses incurred by Contractor in performing the Services.

- C. **Taxes** - Contractor acknowledges that the County is not subject to any state or federal sales, use, transportation and certain excise taxes.

- D. **Payments and Invoicing** - Contractor shall submit invoices for payments due as provided herein and authorized reimbursable expenses incurred with such documentation as required by County. Invoices shall be submitted to:

as provided in Exhibit D attached hereto.

For time and materials Services, all Contractor Personnel shall maintain logs of time worked, and each invoice shall state the date and number of hours worked for Services authorized to be billed on a time and materials basis. All payments shall be made in accordance with the requirements of Section 218.70 et seq., Florida Statutes, "The Local Government Prompt Payment Act." The County may dispute any payments invoiced by Contractor in accordance with the County's Invoice Payments Dispute Resolution Process established in accordance with Section 218.76, Florida Statutes, and any such disputes shall be resolved in accordance with the County's Dispute Resolution Process.

7. Personnel

- A. **E-Verify** - The contractor and subcontractor must register with and use the E-verify system in accordance with Florida Statute 448.095. A contractor and subcontractor may not enter into a contract with the County unless each party registers with and uses the E-verify system. If a contractor enters a contract with a subcontractor, the subcontractor must provide the contractor with an affidavit stating that the Subcontractor does not employ, contract with, or subcontract with unauthorized aliens. The contractor must maintain a copy of the affidavit for the duration of the contract. If the County, Contractor, or Subcontractor has a good faith belief that a person or entity with which it is contracting has knowingly violated Florida Statute 448.09(1) shall immediately terminate the contract with the person or entity. If the County has a good faith belief that a Subcontractor knowingly violated this provision, but the Contractor otherwise complied with this provision, the County will notify the Contractor and order that the Contractor immediately terminate the contract with the Subcontractor. A contract terminated under the provisions of this section is not a breach of contract and may not be considered such. Any contract termination under the provisions of this section may be challenged to Section 448.095(2)(d), Florida Statute. Contractor acknowledges upon termination of this agreement by the County for violation of this section by Contractor, Contractor may not be awarded a public contract for at least one (1) year. Contractor acknowledges that Contractor is liable for any additional costs incurred by the County as a result of termination of any contract for a violation of this section. Contractor or Subcontractor shall insert in any subcontracts the clauses set forth in this section, requiring the subcontracts to include these clauses in any lower tier subcontracts. Contractor shall be responsible for compliance by any Subcontractor or Lower Tier Subcontractor with the clause set for in this section.

AGREEMENT

- B. **Qualified Personnel** - Contractor agrees that each person performing Services in connection with this Agreement shall have the qualifications and shall fulfill the requirements set forth in this Agreement
- C. **Approval and Replacement of Personnel** - The County shall have the right to approve all Contractor Personnel assigned to provide the Services, which approval shall not be unreasonably withheld. Prior to commencing the Services, the Contractor shall provide at least ten (10) days written notice of the names and qualifications of the Contractor Personnel assigned to perform Services pursuant to the Agreement. Thereafter, during the term of this Agreement, the Contractor shall promptly and as required by the County provide written notice of the names and qualifications of any additional Contractor Personnel assigned to perform Services. The County, on a reasonable basis, shall have the right to require the removal and replacement of any of the Contractor Personnel performing Services, at any time during the term of the Agreement. The County will notify Contractor in writing in the event the County requires such action. Contractor shall accomplish any such removal within forty-eight (48) hours after receipt of notice from the County and shall promptly replace such person with another person, acceptable to the County, with sufficient knowledge and expertise to perform the Services assigned to such individual in accordance with this Agreement. In situations where individual Contractor Personnel are prohibited by applicable law from providing Services, removal and replacement of such Contractor Personnel shall be immediate and not subject to such forty-eight (48) hour replacement timeframe and the provisions of the Termination Section of this Agreement shall apply if minimum required staffing is not maintained.

8. Termination

A. Contractor Default Provisions and Remedies of County

- 1. Events of Default - Any of the following shall constitute a "Contractor Event of Default" hereunder:
 - i. Contractor fails to maintain the staffing necessary to perform the Services as required in the Agreement, fails to perform the Services as specified in the Agreement, or fails to complete the Services within the completion dates as specified in the Agreement;
 - ii. Contractor breaches Confidential Information Section of this Agreement;
 - iii. Contractor fails to gain acceptance of goods and/or services deliverable, for 2 consecutive iterations; or
 - iv. Contractor fails to perform or observe any of the other material provisions of this Agreement.
- 2. Cure Provisions - Upon the occurrence of a Contractor Event of Default as set out above, the County shall provide written notice of such Contractor Event of Default to Contractor ("Notice to Cure"), and Contractor shall have 30 calendar days after the date of a Notice to Cure to correct, cure, and/or remedy the Contractor Event of Default described in the written notice.
- 3. Termination for Cause by the County - In the event that Contractor fails to cure a Contractor Event of Default as authorized herein, or upon the occurrence of a Contractor Event of Default as specified in Termination – Contractor Default Provisions and Remedies of County – Events of Default Section of this Agreement, the County may terminate this Agreement in whole or in part, effective upon receipt by Contractor of written notice of termination pursuant to this provision, and may pursue such remedies at law or in equity as may be available to the County.

B. County Default Provisions and Remedies of Contractor

- 1. Events of Default - Any of the following shall constitute a "County Event of Default" hereunder:
 - i. the County fails to make timely undisputed payments as described in this Agreement;
 - ii. the County breaches Confidential Information Section of this Agreement; or
 - iii. the County fails to perform any of the other material provisions of this Agreement.
- 2. Cure Provisions - Upon the occurrence of a County Event of Default as set out above, Contractor shall provide written notice of such County Event of Default to the County ("Notice to Cure"), and the County shall have thirty (30) calendar days after the date of a Notice to Cure to correct, cure, and/or remedy the County Event of Default described in the written notice.
- 3. Termination for Cause by Contractor - In the event the County fails to cure a County Event of Default as authorized herein, Contractor may terminate this Agreement in whole or in part effective on receipt by the County of written notice of termination pursuant to this provision and may pursue such remedies at law or in equity as may be available to the Contractor.

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C. Termination for Convenience

1. Notwithstanding any other provision herein, the County may terminate this Agreement, without cause, by giving 30 days advance written notice to the Contractor of its election to terminate this Agreement pursuant to this provision.

9. Time is of the Essence

Time is of the essence with respect to all provisions of this Agreement that specify a time for performance, including the Services as described in the Exhibits attached hereto; provided, however, that the foregoing shall not be construed to limit a Party's cure period allowed in the Agreement.

10. Confidential Information and Public Records

- A. **County Confidential Information** - Contractor shall not disclose to any third-party County Confidential Information that Contractor, through its Contractor Personnel, has access to or has received from the County pursuant to its performance of Services pursuant to the Agreement, unless approved in writing by the County Contract Manager. All such County Confidential Information will be held in trust and confidence from the date of disclosure by the County, and discussions involving such County Confidential Information shall be limited to Contractor Personnel as is necessary to complete the Services.
- B. **Contractor Confidential Information** - All Contractor Confidential Information received by the County from Contractor will be held in trust and confidence from the date of disclosure by Contractor and discussions involving such Contractor Confidential Information shall be limited to the members of the County's staff and the County's subcontractors who require such information in the performance of this Agreement. The County acknowledges and agrees to respect the copyrights, registrations, trade secrets and other proprietary rights of Contractor in the Contractor Confidential Information during and after the term of the Agreement and shall at all times maintain the confidentiality of the Contractor Confidential Information provided to the County, subject to federal law and the laws of the State of Florida related to public records disclosure. Contractor shall be solely responsible for taking any and all action it deems necessary to protect its Contractor Confidential Information except as provided herein. Contractor acknowledges that the County is subject to public records legislation, including but not limited to Chapter 119, Florida Statutes, and the Florida Rules of Judicial Administration, and that any of the County's obligations under this Section may be superseded by its obligations under any requirements of said laws.
- C. **Public Records** - Contractor acknowledges that information and data it manages as part of the services may be public records in accordance with Chapter 119, Florida Statutes and Pinellas County public records policies. Contractor agrees that prior to providing services it will implement policies and procedures to maintain, produce, secure, and retain public records in accordance with applicable laws, regulations, and County policies, including but not limited to the Section 119.0701, Florida Statutes. Notwithstanding any other provision of this Agreement relating to compensation, the Contractor agrees to charge the County, and/or any third parties requesting public records only such fees allowed by Section 119.07, Florida Statutes, and County policy for locating and producing public records during the term of this Agreement.

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 Pinellas County Board of County Commissioners, Purchasing and Risk Management Department, Operations Manager custodian of public records at 727-464-3311, purchase@pinellascounty.org, Pinellas County Government, Purchasing and Risk Management Department, Operations Manager, 400 S. Ft. Harrison Ave, 6th Floor, Clearwater, FL 33756.

11. Audit

Contractor shall retain all records relating to this Agreement for a period of at least 5 years after final payment is made. All records shall be kept in such a way as will permit their inspection pursuant to Chapter 119, Florida Statutes. In addition, County reserves the right to examine and/or audit such records.

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12. Compliance with Laws

Contractor shall comply with all applicable federal, state, county and local laws, ordinances, rules and regulations in the performance of its obligations under this Agreement, including the procurement of permits and certificates where required, and including but not limited to laws related to Workers Compensation, Americans with Disabilities Act (ADA), Section 504 of the Rehabilitation Act of 1973, Minority Business Enterprise (MBE), occupational safety and health and the environment, equal employment opportunity, privacy of medical records and information, as applicable. Failure to comply with any of the above provisions shall be considered a material breach of the Agreement.

13. Digital Accessibility

Supplier acknowledges and warrants that all digital content and services provided under this contract conforms and shall continue to conform during the Term of this Agreement to the W3C Web Content Accessibility Guidelines, version 2.0 ("WCAG 2.0") at conformance Level A and AA. If all digital content and services does not fully conform to WCAG 2.0 A and AA, Supplier shall advise Pinellas County in writing of the nonconformance prior to execution of this Agreement and shall provide Pinellas County a plan to achieve conformance to WCAG 2.0 A and AA, including but not limited to, an intended timeline for conformance. Failure to achieve conformance, as determined in Pinellas County's sole discretion, on its intended timeline shall be considered a material breach of this Agreement and grounds for termination by Pinellas County.

If during the Term of this Agreement, Supplier fails to maintain compliance with WCAG 2.0 A and AA or Pinellas County otherwise identifies an issue related to accessibility of the product (the "Accessibility Issue") that renders the product inaccessible, then Pinellas County shall notify Supplier of non-compliance. Within 30 days of Supplier's receipt of a non-compliance notice ("Notice"), Supplier and Pinellas County shall meet and mutually agree upon an appropriate timeline for resolution of the Accessibility Issue(s) ("Initial Meeting").

Should Supplier:

- i. fail to acknowledge receipt of the notice within 30 days of receipt of the Notice;
- ii. unreasonably and solely withhold agreement regarding a timeline for resolution for more than 30 days following the Initial Meeting; or
- iii. fail to materially resolve the Accessibility Issue(s) within the agreed-upon timeline,

Failure to comply with the requirements of this section shall constitute a material breach of this Agreement and shall be grounds for termination of this Agreement by Pinellas County and subject Supplier to the Liability and Insurance – Indemnification Section of this Agreement, "Indemnification."

14. Public Entities Crimes

Contractor is directed to the Florida Public Entities Crime Act, Section 287.133, Florida Statutes, as well as Florida Statute 287.135 regarding Scrutinized Companies, and represents to County that Contractor is qualified to transact business with public entities in Florida, and to enter into and fully perform this Agreement subject to the provisions stated therein. Failure to comply with any of the above provisions shall be considered a material breach of the Agreement.

AGREEMENT

15. Liability and Insurance

- A. **Insurance** - Contractor shall comply with the insurance requirements set out in the Insurance Exhibit, attached hereto and incorporated herein by reference.
- B. **Indemnification** - Contractor agrees to indemnify, pay the cost of defense, including attorney's fees, and hold harmless the County, its officers, employees and agents from all damages, suits, actions or claims, including reasonable attorney's fees incurred by the County, of any character brought on account of any injuries or damages received or sustained by any person, persons, or property, or in any way relating to or arising from the Agreement; or on account of any act or omission, neglect or misconduct of Contractor; or by, or on account of, any claim or amounts recovered under the Workers' Compensation Law; or of any other laws, regulations, ordinance, order or decree; or arising from or by reason of any actual or claimed trademark, patent or copyright infringement or litigation based thereon; or for any violation of requirements of the Americans with Disabilities Act of 1990, as may be amended, and all rules and regulations issued pursuant thereto (collectively the "ADA") except when such injury, damage, or violation was caused by the sole negligence of the County.
- C. **Liability** - Neither the County nor Contractor shall make any express or implied agreements, guaranties or representations, or incur any debt, in the name of or on behalf of the other Party. Neither the County nor Contractor shall be obligated by or have any liability under any agreements or representations made by the other that are not expressly authorized hereunder. The County shall have no liability or obligation for any damages to any person or property directly or indirectly arising out of the operation by Contractor of its business, whether caused by Contractor's negligence or willful action or failure to act.
- D. **Contractor's Taxes** - The County will have no liability for any sales, service, value added, use, excise, gross receipts, property, workers' compensation, unemployment compensation, withholding or other taxes, whether levied upon Contractor or Contractor's assets, or upon the County in connection with Services performed or business conducted by Contractor. Payment of all such taxes and liabilities shall be the responsibility of Contractor.

16. County's Funding

The Agreement is not a general obligation of the County. It is understood that neither this Agreement nor any representation by any County employee or officer creates any obligation to appropriate or make monies available for the purpose of the Agreement beyond the fiscal year in which this Agreement is executed. No liability shall be incurred by the County, or any department, beyond the monies budgeted and available for this purpose. If funds are not appropriated by the County for any or all of this Agreement, the County shall not be obligated to pay any sums provided pursuant to this Agreement beyond the portion for which funds are appropriated. The County agrees to promptly notify Contractor in writing of such failure of appropriation, and upon receipt of such notice, this Agreement, and all rights and obligations contained herein, shall terminate without liability or penalty to the County.

17. Orders

Within the term of this Agreement, County may place one or more orders for goods and/or services at the prices listed on the Price Schedule Exhibit attached hereto, and which is incorporated by reference hereto.

18. Name Changes

The Contractor is responsible for immediately notifying the County of any company name change, which would cause invoicing to change from the name used at the time of the original Agreement.

19. Acceptance of Services

For all Services deliverables that require County acceptance as provided in the Statement of Work, the County, through the contract administrator or designee, will have 10 calendar days to review the deliverable(s) after receipt or completion of same by Contractor, and either accept or reject the deliverable(s) by written notice to *[Proposer]* _____. If a deliverable is rejected, the written notice from the County will specify any required changes, deficiencies, and/or additions necessary. Contractor shall then have 7 calendar days to revise the deliverable(s) to resubmit and/or complete the deliverable(s) for review and approval by the County, who will then have 7 calendar days to review and approve, or reject the deliverable(s); provided however, that Contractor shall not be responsible for any delays in the overall project schedule that result from the County's failure to timely approve or reject deliverable(s) as provided herein. Upon final acceptance of the deliverable(s), the County will accept the deliverable(s) in writing.

AGREEMENT

20. Subcontracting/Assignment

- A. **Subcontracting** - Contractor is fully responsible for completion of the Services required by this Agreement and for completion of all subcontractor work, if authorized as provided herein. Contractor shall not subcontract any work under this Agreement to any subcontractor other than the subcontractors specified in the proposal and previously approved by the County, without the prior written consent of the County, which shall be determined by the County in its sole discretion.
- B. **Assignment** -
 - This Agreement, and any rights or obligations hereunder, shall not be assigned, transferred or delegated to any other person or entity. Any purported assignment in violation of this section shall be null and void.

21. Survival

The provisions of this Agreement shall survive the expiration or termination of this Agreement.

22. Notices

All notices, authorizations, and requests in connection with this Agreement shall be deemed given on the day they are: (1) deposited in the U.S. mail, postage prepaid, certified or registered, return receipt requested; or (2) sent by air express courier (e.g., Federal Express, Airborne, etc.), charges prepaid, return receipt requested; or (3) sent via email and addressed as set forth below, which designated person(s) may be amended by either Party by giving written notice to the other Party:

For County:

Attn: Mr. Isaiah Jackson, Director
Business & Customer Services Division
Pinellas County Utilities
14 South Fort Harrison Avenue
Clearwater, FL 33756

with a copy to:

Attn: Merry Celeste,
Purchasing and Risk Management Division Director
Pinellas County Purchasing Department
400 South Fort Harrison Avenue
Clearwater, FL 33756

For Contractor:

Attn:

23. Conflict of Interest

- A. 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 of the Services required hereunder, and that no person having any such interest shall be employed by Contractor during the agreement term and any extensions.
- B. The Contractor shall promptly notify the County in writing of any business association, interest, or other circumstance which constitutes a conflict of interest as provided herein. If the Contractor is in doubt as to whether a prospective business association, interest, or other circumstance constitutes a conflict of interest, the Contract may identify the prospective business association, interest or circumstance, the nature of work that the Contractor may undertake and request an opinion as to whether the business association, interest or circumstance

AGREEMENT

constitutes a conflict of interest if entered into by the Contractor. The County agrees to notify the Contractor of its opinion within (10) calendar days of receipt of notification by the Contractor, which shall be binding on the Contractor.

24. Right to Ownership

All work created, originated and/or prepared by Contractor in performing Services pursuant to the Agreement, including documents created, reporting, and other documentation or improvements related thereto, to the extent that such work, products, documentation, materials or information are described in or required by the Services (collectively, the "Work Product") shall be County's property when completed and accepted, if acceptance is required in this Agreement, and the County has made payment of the sums due therefore. The ideas, concepts, know-how or techniques developed during the course of this Agreement by the Contractor or jointly by Contractor and the County may be used by the County without obligation of notice or accounting to the Contractor. Any data, information or other materials furnished by the County for use by Contractor under this Agreement shall remain the sole property of the County.

25. Amendment

This Agreement may be amended by mutual written agreement of the Parties hereto.

26. Severability

The terms and conditions of this Agreement shall be deemed to be severable. Consequently, if any clause, term, or condition hereof shall be held to be illegal or void, such determination shall not affect the validity or legality of the remaining terms and conditions, and notwithstanding any such determination, this Agreement shall continue in full force and effect unless the particular clause, term, or condition held to be illegal or void renders the balance of the Agreement impossible to perform.

27. Applicable Law and Venue

This Agreement and any and all purchases made hereunder shall be governed by and construed in accordance with the laws of the State of Florida (without regard to principles of conflicts of laws). The Parties agree that all actions or proceedings arising in connection with this Agreement shall be tried and litigated exclusively in the state or federal (if permitted by law and a Party elects to file an action in federal court) courts located in or for Pinellas County, Florida. This choice of venue is intended by the Parties to be mandatory and not permissive in nature, and to preclude the possibility of litigation between the Parties with respect to, or arising out of, this Agreement in any jurisdiction other than that specified in this section. Each Party waives any right it may have to assert the doctrine of forum non-conveniens or similar doctrine or to object to venue with respect to any proceeding brought in accordance with this section.

28. Waiver

No waiver by either Party of any breach or violation of any covenant, term, condition, or provision of this Agreement or of the provisions of any ordinance or law, shall be construed to waive any other term, covenant, condition, provisions, ordinance or law, or of any subsequent breach or violation of the same.

29. Due Authority

Each Party to this Agreement represents and warrants that: (i) it has the full right and authority and has obtained all necessary approvals to enter into this Agreement; (ii) each person executing this Agreement on behalf of the Party is authorized to do so; (iii) this Agreement constitutes a valid and legally binding obligation of the Party, enforceable in accordance with its terms.

30. No Third-Party Beneficiary

The Parties hereto acknowledge and agree that there are no third-party beneficiaries to this Agreement. Persons or entities not a party to this Agreement may not claim any benefit from this Agreement or as third-party beneficiaries hereto.

AGREEMENT

31. Force Majeure

“Force Majeure Event” means any act or event that (i) prevents a Party (the “Nonperforming Party”) from performing its obligations or satisfying a condition to the other Party’s (the “Performing Party”) obligations under this Agreement, (ii) is beyond the reasonable control of and not the fault of the Nonperforming Party, and (iii) the Nonperforming Party has not, through commercially reasonable efforts, been able to avoid or overcome. Force Majeure Event(s) do not include economic hardship, changes in market conditions or insufficiency of funds. If a Force Majeure Event occurs, the Nonperforming Party is excused from the performance thereby prevented and from satisfying any conditions precedent to the Performing Party’s performance that cannot be satisfied, in each case to the extent limited or prevented by the Force Majeure Event. The Nonperforming Party must promptly notify the Performing Party upon the occurrence of a Force Majeure Event. When the Nonperforming Party is able to resume its performance or satisfy the conditions precedent to the Performing Party’s obligations, the Nonperforming Party will resume performance under this Agreement without undue delay. Each Party will use commercially reasonable efforts to mitigate the effect of a Force Majeure Event.

32. Entirety

This Agreement constitutes the entire Agreement between the Parties and supersedes all prior negotiations, representations or agreements either oral or written.

(Signature Page Follows)

AGREEMENT

IN WITNESS WHEREOF, the Parties hereto have executed this Agreement the day and year first written.

PINELLAS COUNTY, a political subdivision of the State of Florida **PINELLAS COUNTY** acting by and through the

Purchasing and Risk Management Division Director

By: _____

By: _____

Signature _____

Signature _____

__Merry Celeste_____
Print Name

Print Name

Title

Title

Date

Date

AGREEMENT

EXHIBIT A - STATEMENT OF WORK

AGREEMENT

EXHIBIT B - INSURANCE REQUIREMENTS

AGREEMENT

EXHIBIT C - PAYMENT SCHEDULE

AGREEMENT

EXHIBIT D - PAYMENT/INVOICES**PAYMENT/INVOICES:**

SUPPLIER shall submit invoices for payment due as provided herein with such documentation as required by Pinellas County and all payments shall be made in accordance with the requirements of Section 218.70 et. seq, Florida Statutes, "The Local Government Prompt Payment Act." Invoices shall be submitted to the address below unless instructed otherwise on the purchase order, or if no purchase order, by the ordering department:

Finance Division Accounts Payable
Pinellas County Board of County Commissioners
P. O. Box 2438
Clearwater, FL 33757

Each invoice shall include, at a minimum, the Supplier's name, contact information and the standard purchase order number. In order to expedite payment, it is recommended the Supplier also include the information shown in below. The County may dispute any payments invoiced by SUPPLIER in accordance with the County's Dispute Resolution Process for Invoiced Payments, established in accordance with Section 218.76, Florida Statutes, and any such disputes shall be resolved in accordance with the County's Dispute Resolution Process.

INVOICE INFORMATION:

Supplier Information Company name, mailing address, phone number, contact name and email address as provided on the PO

Remit To Billing address to which you are requesting payment be sent

Invoice Date Creation date of the invoice

Invoice Number Company tracking number

Shipping Address Address where goods and/or services were delivered

Ordering Department Name of ordering department, including name and phone number of contact person

PO Number Standard purchase order number

Ship Date Date the goods/services were sent/provided

Quantity Quantity of goods or services billed

Description Description of services or goods delivered

Unit Price Unit price for the quantity of goods/services delivered

Line Total Amount due by line item

Invoice Total Sum of all of the line totals for the invoice

Pinellas County offers a credit card payment process (ePayables) through Bank of America. Pinellas County does not charge vendors to participate in the program; however, there may be a charge by the company that processes your credit card transactions. For more information please visit Pinellas County purchasing website at www.pinellascounty.org/purchase.

AGREEMENT**EXHIBIT E - DISPUTE RESOLUTION FOR PINELLAS COUNTY BOARD OF COUNTY COMMISSIONERS IN MATTERS OF INVOICE PAYMENTS:**

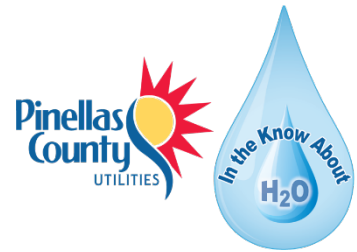
Payment of invoices for work performed for Pinellas County Board of County Commissioners (County) is made, by standard, in arrears in accordance with Section 218.70, et. seq., Florida Statutes, the Local Government Prompt Payment Act.

If a dispute should arise as a result of non-payment of a payment request or invoice the following Dispute Resolution process shall apply:

- A. Pinellas County shall notify a vendor in writing within 10 days after receipt of an improper invoice, that the invoice is improper. The notice should indicate what steps the vendor should undertake to correct the invoice and resubmit a proper invoice to the County. The steps taken by the vendor shall be that of initially contacting the requesting department to validate their invoice and receive a sign off from that entity that would indicate that the invoice in question is in keeping with the terms and conditions of the agreement. Once sign off is obtained, the vendor should then resubmit the invoice as a "Corrected Invoice" to the requesting department which will initiate the payment timeline.
 1. Requesting department for this purpose is defined as the County department for whom the work is performed.
 2. Proper invoice for this purpose is defined as an invoice submitted for work performed that meets prior agreed upon terms or conditions to the satisfaction of Pinellas County.
- B. Should a dispute result between the vendor and the County about payment of a payment request or an invoice then the vendor should submit their dissatisfaction in writing to the Requesting Department. Each Requesting Department shall assign a representative who shall act as a "Dispute Manager" to resolve the issue at departmental level.
- C. The Dispute Manager shall first initiate procedures to investigate the dispute and document the steps taken to resolve the issue in accordance with section 218.76 Florida Statutes. Such procedures shall be commenced no later than 45 days after the date on which the payment request or invoice was received by Pinellas County, and shall not extend beyond 60 days after the date on which the payment request or invoice was received by Pinellas County.
- D. The Dispute Manager should investigate and ascertain that the work, for which the payment request or invoice has been submitted, was performed to Pinellas County's satisfaction and duly accepted by the Proper Authority. Proper Authority for this purpose is defined as the Pinellas County representative who is designated as the approving authority for the work performed in the contractual document. The Dispute Manager shall perform the required investigation and arrive at a solution before or at the 60 days timeframe for resolution of the dispute, per section 218.76, Florida Statutes. The County Administrator or his or her designee shall be the final arbiter in resolving the issue before it becomes a legal matter. The County Administrator or his or her designee will issue their decision in writing.
- E. Pinellas County Dispute Resolution Procedures shall not be subject to Chapter 120 of the Florida Statutes. The procedures shall also, per section 218.76, Florida Statutes, not be intended as an administrative proceeding which would prohibit a court from ruling again on any action resulting from the dispute.
- F. Should the dispute be resolved in the County's favor interest charges begin to accrue 15 days after the final decision made by the County. Should the dispute be resolved in the vendor's favor the County shall pay interest as of the original date the payment was due.
- G. For any legal action to recover any fees due because of the application of sections 218.70 et. seq., Florida Statutes, an award shall be made to cover court costs and reasonable attorney fees, including those fees incurred as a result of an appeal, to the prevailing party. If it is found that the non-prevailing party held back any payment that was the reason for the dispute without having any reasonable lawful basis or fact to dispute the prevailing party's claim to those amounts.



PINELLAS COUNTY UTILITIES
2020-2025
STRATEGIC PLAN
2022





Pinellas County is truly an exciting destination as well as a great place to call home. With an outstanding reputation for economic development and innovation combined with a history of award-winning beaches and 35 miles of coastline, Pinellas County is an organization that seeks to set the standard of excellence in public service. Our Utilities department is one of our many departments that provides vital services to our citizens and visitors. Our role in water resource management is fundamental to maintaining our vibrant community while enhancing our natural environment. This strategic plan will further our vision to be the standard for public service in America.

Barry Burton

Barry Burton
County Administrator



The role of water and wastewater infrastructure is critical to public health and the natural environment in Pinellas County. As stewards of these valuable water resources and supporting infrastructure, Pinellas County Utilities seeks to harness innovative strategies to meet the needs of today while planning for tomorrow. Our strategic planning effort aligns effective utility management strategies with public outcomes that will allow us to continue providing superior services to our customers and visitors for years to come.

Megan E. Ross

Megan E. Ross
Director of Utilities

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Executive Summary

The Pinellas County Utilities (PCU) Strategic Plan is essential to advancing the overall mission and vision of Pinellas County. The PCU Strategic Plan is informed and guided by the Pinellas County Board of County Commissioners (BCC) Strategic Plan and supported by the PCU department work plan. It serves in unison with the County’s Comprehensive Plan. PCU’s Strategic Plan guides the delivery of excellent public services that facilitates stewardship of water resources, economic development, and improved quality of life for residents and visitors to Pinellas County.

The plan implements a systematic and ongoing inventory, analysis, and assessment process that helps PCU now and in the future. Additionally, it provides a platform for connecting ongoing work plan initiatives and resources with public outcomes. Ultimately the plan will guide PCU in an appropriate direction for current and future programs and services.

This plan strives to be a tool that enables adaptation to a dynamic and complex operating environment through benchmarking, annual thoughtful reflection of progress and direction, and consideration of future initiatives. It is essential to the department’s success.

As part of the annual revision process, PCU held workshops with front-line staff and senior leadership and updated its self-assessment, identifying strengths, weaknesses, opportunities, and threats (SWOT). PCU identified reliable service and a passionate workforce as top strengths, while areas of weakness included communication, data management, and workforce challenges.

Strategic Goal	Desired Outcome for PCU
Product Quality	Provide superior, reliable water resources to Pinellas County
Operational Optimization	Be an innovative industry leader
Financial Viability	Assure financial strength and understanding
Infrastructure Strategy and Performance	Proactively manage infrastructure to meet current and future needs
Employee and Leadership Development	Develop, maintain, and recruit a high performing workforce
Customer Satisfaction	Inspire customer confidence, enhance communication and perception
Stakeholder Understanding and Support	Be a trusted collaborative partner
Enterprise Resiliency	Effectively manage risks
Community Sustainability	Fulfill our role as leaders in the entire community
Water Resource Sustainability	Protect and manage water resources

The PCU strategic plan identifies a clear basis and framework to align the strategic plan goals. After reviewing best practices, PCU embraced the concepts outlined in the Effective Utility Management Manual (EUM). This manual is a widely adopted management manual supported by leading industry associations and utilities nationwide. PCU aligned the EUM’s ten goals with Pinellas County’s desired public outcomes through evaluating forward-looking trends impacting the industry both nationally and locally.

Some strategies and objectives have been updated and added to align with Utilities' and the County's priorities for 2022 and beyond. Pinellas County Utilities accomplished several objectives and completed multiple strategies in 2021; see [Appendix A](#) for more information. Key accomplishments include the following highlights:

- **Goal 3 Financial Viability** – PCU entered into the third year of a four-year rate plan that delivers revenue sustainability for water and wastewater funds to invest in capital improvements for infrastructure. Additionally, PCU was awarded over \$25 million in American Rescue Plan Act (ARPA) funds through the Resilient Florida Grant from the Florida Department of Environment Protection (FDEP).
- **Goal 5 Employee & Leadership Development** – PCU launched the employee recognition program in 2021. Between March 2021 and February 2022, PCU recognized 80 employees for outstanding performance, innovation, or contributions to the organization and County. Employees received rewards based on their contribution tier (bronze, silver, and gold) and were recognized in the quarterly department meetings for the entire utility.
- **Goal 8 Enterprise Resiliency** – PCU completed the Disaster Master Plan and participated in five training exercises in 2021 focused on cybersecurity and hurricane response.
- **Goal 9 Community Sustainability** – PCU developed multiple recruiting initiatives to foster community growth and vitality. The Jail to Jobs program and Veterans in Water initiative expanded the applicant pool from Pinellas County. Further efforts focused on Pinellas County Schools, the Florida Youth Ranch, and other non-profits such as the Camelot Community Care offered more opportunities to hire local applicants.

Introduction

In 2020, PCU launched a Strategic Plan to achieve desired public outcomes more closely through organizational objectives and performance measures. This approach aligned with the countywide BCC Strategic Plan goals that cross several service delivery areas, as shown below.

Pinellas County **PINELLAS COUNTY'S Strategic Plan**
Our Vision: To Be the Standard for Public Service in America.

Our Mission: Pinellas County Government is committed to progressive public policy, superior public service, courteous public contact, judicious exercise of authority, and responsible management of public resources to meet the needs and concerns of our citizens today and tomorrow.

Deliver First-Class Services to the Public and Our Customers

- 5.1 Maximize partner relationships and public outreach
- 5.2 Be responsible stewards of the public's resources
- 5.3 Ensure effective and efficient delivery of county services and support
- 5.4 Strive to serve the needs of all Pinellas County residents and customers

Ensure Public Health, Safety, and Welfare

- 2.1 Provide planning, coordination, prevention, and protective services to create and enhance a safe, secure, and healthy community
- 2.2 Be a facilitator, convener, and purchaser of services for those in need
- 2.3 Provide comprehensive services to connect our veterans and dependents to the benefits they have earned
- 2.4 Support programs that seek to prevent and remedy the causes of homelessness and move homeless individuals and families to permanent housing
- 2.5 Enhance pedestrian and bicycle safety

Practice Superior Environmental Stewardship

- 3.1 Implement green technologies and practices where practical
- 3.2 Preserve and manage environmental lands, beaches, parks, and historical assets
- 3.3 Protect and improve the quality of our water, air, and other natural resources
- 3.4 Reduce/reuse/recycle resources. Including energy, water, and solid waste
- 3.5 Foster a sustainable and resilient community that is prepared for sea level rise and a changing climate

Foster Continual Economic Growth and Vitality

- 4.1 Proactively attract and retain businesses with targeted jobs to the county and the region
- 4.2 Invest in communities that need the most
- 4.3 Catalyze redevelopment through planning and regulatory programs
- 4.4 Invest in infrastructure to meet current and future needs
- 4.5 Provide safe and effective transportation systems to support the efficient flow of motorists, commerce, and regional connectivity
- 4.6 Support a vibrant community with recreation, arts, and culture to attract residents and visitors

Create a Quality Workforce in a Positive, Supportive Organization

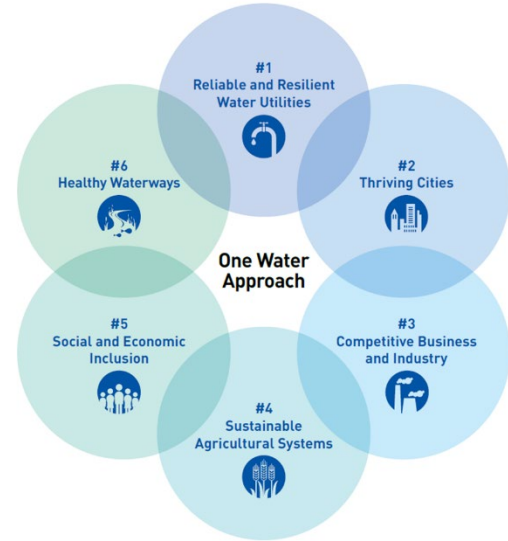
- 1.1 Recruit, select, and retain the most diverse and talented workforce
- 1.2 Leverage, promote, and expand opportunities for workforce growth and development
- 1.3 Make workforce safety and wellness a priority
- 1.4 Maintain a fair and competitive compensation package

Updated 6/2021

Through annual business planning and budgeting, the Pinellas County Utilities Department has aligned activities and initiatives to the strategic plan, identified the performance measures used to gauge success, and sought the resources needed to execute plans. This year's strategic plan update assesses and provides a five-year outlook from 2020 through 2025.

The two primary publications utilized in the development of the PCU Strategic Plan were the following:

The One Water for America Policy Framework: The U.S. Water Alliance captures significant trends facing the water sector today in this publication. The document also proposes solutions for federal, state, and local levels with the “one water” approach.



Effective Utility Management:

The U.S. Environmental Protection Agency (EPA) outlines the fundamental goals in achieving a balanced and effectively managed utility organization in this document. Leading national associations of the water industry support the publication. PCU’s strategic goals and performance measures align with those outlined in the EUM.

Several department staff and stakeholders are involved in the strategic planning process: front-line staff, senior management, division directors, department leadership, Human Resources staff, and other county department staff. Facilitated workshops were held in 2019 and 2020 to develop and update the components of the plan as follows:

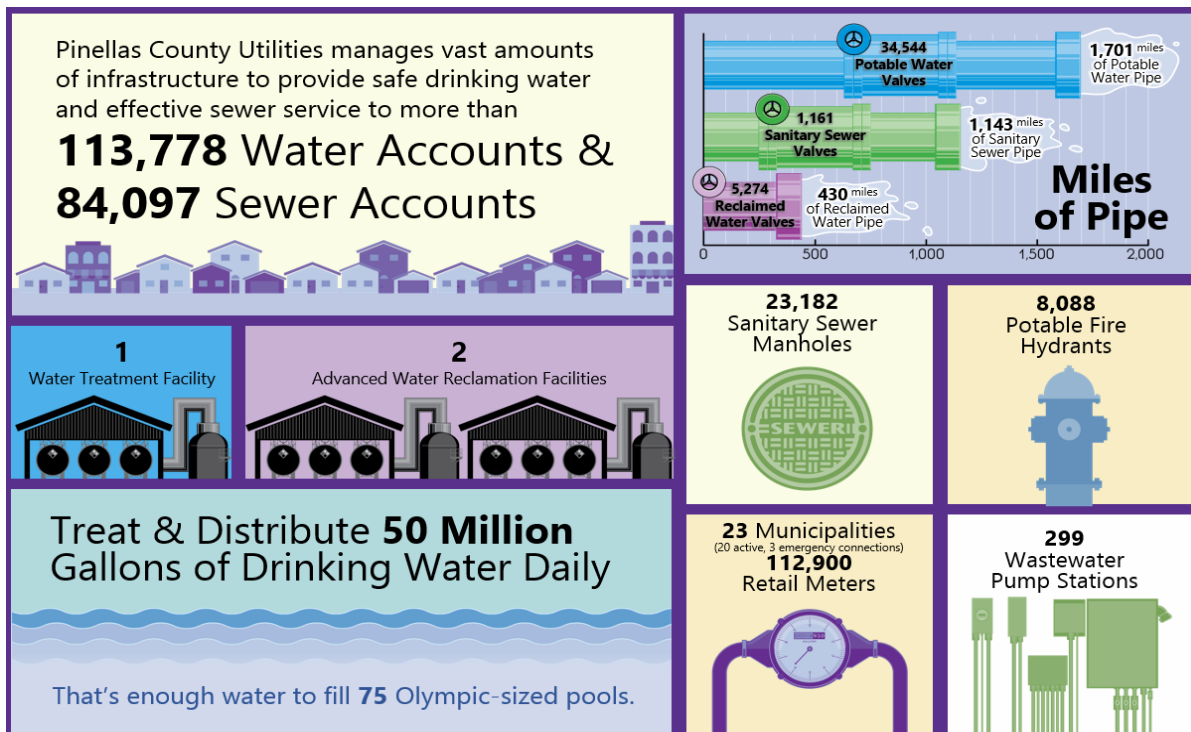
- Mission, Vision, and Values development
- Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis
- Political, Economic, Sociocultural, Technological, Legislative, and Environmental (PESTLE) Analysis
- Industry trends analysis
- Critical strategic goals and outcomes
- Strategic goals, strategies, and objectives formalization
- Implementation plan assignments and tracking
- County administration feedback
- Annual update and review of the plan

Organizational Overview

Organizational Profile

PCU maintains 113,778 retail water accounts and 84,097 retail sewer accounts. PCU owns and operates one water treatment facility and two advanced water reclamation facilities.

Pinellas County Utilities (PCU) is a public utilities department under the Board of County Commissioners. PCU provides drinking water, wastewater, and reclaimed water services to more than 500,000 residents and 6.7 million annual visitors in Pinellas County. PCU provides retail water, wastewater, and reclaimed water services to customers in unincorporated Pinellas County. Additionally, PCU provides retail and wholesale water, wastewater, and reclaimed water to 20 municipalities in Pinellas County and has three emergency connections to other municipalities. [Appendix B](#) provides a detailed list of retail and wholesale customers.



The five divisions of PCU are Maintenance, Operations, Water Quality & Data Management, Business & Customer Services, and Engineering. PCU has 429 full-time positions.

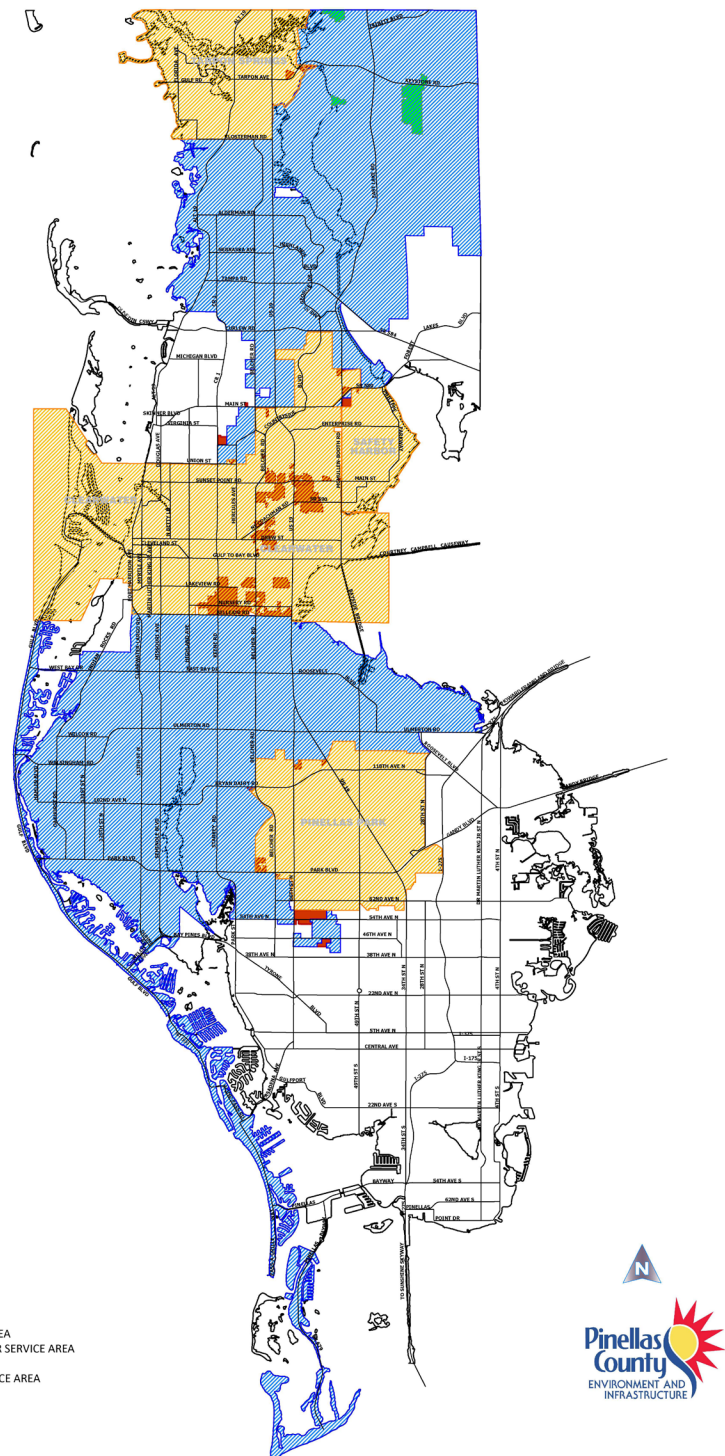
Organizational History

PCU has an established track record of providing reliable service and participating in regional collaboration.

When first established in 1935, the Pinellas County water system provided service to approximately 200 residents in the beach municipalities in response to water production well failures. A special sanitary district was established in the same year, including sewer and solid waste systems. In 1953, the water system expanded and became an enterprise fund.

In 1970, the Pinellas County Sewer Authority was established as a single sewage treatment unit for the County. In 1971, Florida authorized Pinellas County to construct, own, operate, or maintain water systems, sewage disposal systems, water system improvements, and sewer improvements.

In 1997, reclaimed water service was made available in Pinellas County. In 1998, Pinellas County Utilities joined a regional water authority along with municipal partners from Pinellas, Hillsborough, and Pasco counties to form Tampa Bay Water (TBW). All water is purchased wholesale from TBW and distributed by PCU to residential and wholesale customers. Today, Pinellas County Utilities has become and continues to be a leading utility for reliable service and advanced technology serving over 500,000 residents.



PINELLAS COUNTY UTILITIES WATER SERVICE AREAS

Environmental Scan

Community Profile

PCU provides services to a diverse community of residents and visitors settled in a picturesque landscape of a peninsula surrounded by beautiful beaches and coastlines.

Geography

Pinellas County is a peninsula located on the central west coast of Florida, roughly 34.5 miles long with a width varying from 5.2 miles to 15 miles. With the proximity to the Gulf of Mexico and Tampa Bay, Pinellas County's world-renowned beaches and mild climate make Pinellas County a popular destination for new residents, tourists, and seasonal visitors.



Demographics

As of December 2021, there were 978,045 residents in Pinellas County, and the County expects to grow by 3.6% by 2025¹. In 2021, there were 395,286 households in Pinellas County². The 2021 demographics of Pinellas County residents consist of 82.5% Caucasian, 11.1% African American, and 10.2% Hispanic. The 2021 median household income was \$56,737, and the median age was 48.9¹. Finally, the 2021 laborforce size was 490,623, and around 33% of

the population had a bachelor's degree or higher¹.

Unemployment

Pinellas County unemployment dropped from 6.9% in 2020³ to 5.4% in 2021¹. The country has seen a sharp decline in unemployment following relaxed COVID19 response protocols, with a national unemployment rate of 3.6% as of March 2022³.

¹ Pinellas County Economic Development, Dec 1, 2021

² United States Census Bureau, July 1, 2021

³ U.S. Bureau of Labor Statistics

Top 10 Industry Trends

Using the One Water for America Policy Framework, PCU identified the following ten trends in 2020 and compared them against the national trends facing the water sector. The trends were reviewed and updated in 2022. The order of the trends does not reflect their importance but instead reflects PCU's ability to respond to them. Trends are external factors that influence the industry and are critical to identify, understand, and evaluate. PCU determined potential measured responses to the identified trends.

Trend 1 Workforce Issues

The industry is transitioning from a workforce of “baby boomers” to new generations spanning Gen X, millennials, and Gen Z, each with different values, perspectives, and expectations. As older employees retire, newer generations will need the knowledge, training, and commitment to continue to provide a high level of professional services and product quality. Recruitment remains challenging due to the strong economy and a distinct lack of skilled workers. Over the past few decades, the recent trend has been college after high school instead of trade schools. The COVID-19 pandemic impacted the economy in 2020 and 2021, causing fluctuating unemployment rates and impacting workforce trends. In 2022, the unemployment rate dropped to pre-pandemic lows, increasing recruitment challenges. The pandemic also shifted many organizations to a remote work model.

Situation

From 2017 to 2021, PCU experienced 83 retirements, representing nearly 22% of the department's workforce. Additionally, over 24% of PCU's workforce (93 employees) have 20 or more years of experience. There are 20 employees enrolled in the Deferred Retirement Option Program (DROP), with at least 15 scheduled to depart before 2025. In 2022, Pinellas County adopted a remote work policy permitting departments to authorize all eligible employees to work from home at least two days a week. See [Appendix C](#) for more details on workforce concerns.



PCU potential responses:

- Enhance employee recruitment, training and development, and vocational programs.
- Improve employee performance evaluation.
- Measure and improve workforce productivity.
- Implement a succession management plan for the department.

Trend 2 Technology

Solving some of our prominent water challenges requires investing in, developing, and deploying new technologies and processes to transform water and wastewater resource and



infrastructure management. Wastewater can be a valuable product stream from industrial or municipal sources. New analytical tools and data management platforms can provide more precise, real-time data on water quality, volume, flows, and infrastructure conditions to facilitate better decision-making.

Situation

Technologies are progressing within the water sector and include artificial intelligence developed for water and wastewater treatment. PCU leverages technology such as unmanned aerial vehicles (drones) for infrastructure condition assessments. SCADA, GIS, Cityworks, and remote work capabilities are

changing how PCU operates. Mobile devices and tablets enable maintenance crews and plant operators to make updates in the field and provide real-time updates on system statuses.

PCU potential responses:

- Support and expand technologies that leverage our region's resources to create economic opportunity and catalyze innovation.
- Invest in solutions that build efficiency and provide a return on investment.
- Develop and implement a SCADA Master Plan.
- Establish a dedicated Data Management team.

Trend 3 Adequate Funding for Utility Infrastructure

The utility sector capital needs are increasing to meet the challenges of water and wastewater system renewal and replacement programs, regulatory compliance, and resiliency adaptation. Increasing operating costs exacerbate those needs. In 1977, the federal government contributed 63% of total capital spending on water infrastructure⁴. Today, it funds just 9%, compared to

federal spending on transportation which has remained constant. The U.S. water industry is still partly supported by tax-exempt financing and subsidized borrowing programs like the Water Infrastructure Finance and Innovation Act (WIFIA) and State Revolving Fund (SRF) loans. The Clean Water and Drinking Water SRF provisions in the Bipartisan



Infrastructure law from November 2021 allocated \$50 billion to the EPA for water system improvements. However, this subsidization does not approach the levels needed for reinvestment in aging systems nationwide. Therefore, revenue from water, sewer, and reclaimed water rates and charges continue to be the primary source of funds for our water infrastructure. Our focus must be on thoroughly assessing the cost of water management, improving the cost-effectiveness of water services, and continuing to educate the public on our infrastructure needs.

Situation

PCU recently conducted a rate study that identified and addressed funding needs for our water and sewer systems. The upcoming water and sewer master plans may identify additional funding needs going into the future. The results will necessitate a short and long-term evaluation of critical infrastructure rehabilitation needs short and long-term to align with necessary funding strategies.

PCU potential responses:

- Enhance communications with stakeholders regarding the value of water.
- Improve the efficiency and effectiveness of PCU operations and workforce.
- Investigate and secure co-funding and grants to offset costs and rate impacts.

⁴ "Public Spending on Transportation and Water Infrastructure, 1956 to 2017." Congressional Budget Office, 15 Oct. 2018, www.cbo.gov/publication/54539

Trend 4 Customer Expectations

The crisis in Flint, Michigan, raised awareness and expectations nationwide regarding the state of our nation's drinking water. More recently, per- and polyfluoroalkyl substances (PFAS) and other emerging contaminants are growing concerns in water systems.

Situation

Locally, recent hurricanes and tropical storms have raised awareness of the vulnerability of our wastewater infrastructure and its role in protecting public health and the environment.

Subsequently, there is significant public awareness and attention to water and wastewater systems. Public utilities in Pinellas County do not control the quality of plumbing systems within individual property lines nor the private sector contribution of inflow and infiltration leading to sanitary sewer overflows (SSOs). However, water utilities can lead collaborative efforts to find solutions to their communities' problems motivated by the imperative of public health and environmental protection. PCU is committed to providing safe drinking water and wastewater services. To do so, PCU must reach across silos to generate and communicate communitywide solutions that engage healthcare systems, school systems, city departments, state agencies, and community groups while balancing limited resources across each organization's unique set of priorities.

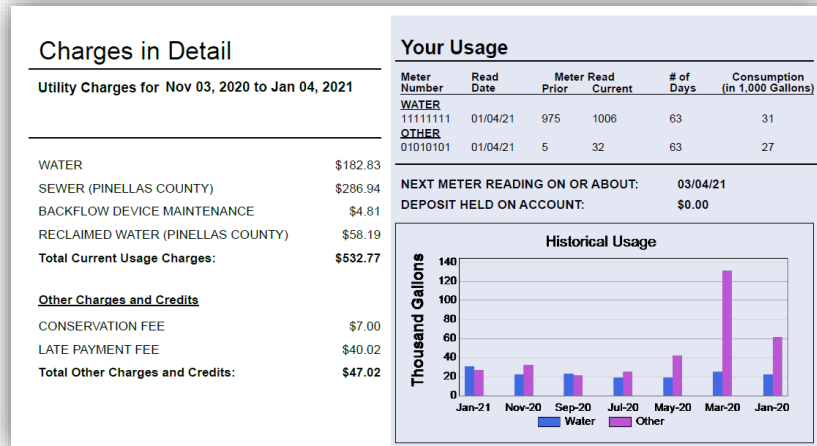


PCU potential responses:

- Enhance focus on understanding and meeting or exceeding customer expectations.
- Improve customer communication and stakeholder outreach.
- Develop programs that go beyond current regulations to achieve enhanced public outcomes.
- Enhance focus on emergency response.

Trend 5 Affordability of Services

The issue of affordability is ensuring everyone has access to affordable water and sewer service while also generating sufficient utility revenues to cover rising costs, address aging infrastructure needs, and protect public health. Providing a mechanism that incorporates enhanced equity and timely bill payments will promote a higher quality of life for customers and a more reliable revenue stream for the utility.



Situation:

PCU has a robust capital plan to invest in infrastructure rehabilitation and replacement to ensure residents receive high-quality services. Rising material costs and inflation must be accounted for as PCU assesses fees regularly. PCU must determine the best way to meet these needs while keeping costs affordable for our customers.

PCU Potential Responses:

- Enhanced strategies for convenient bill payment.
- Partner with local social service agencies to address communities in need.
- Conduct fee assessments every two years.

Trend 6 Energy

Energy costs will remain a significant percentage of the total cost to provide utility services. The growth of electric vehicles by public utilities and local governments will also increase energy consumption though it may decrease fuel costs. As the cost of energy continues to rise, so will the need to continue to focus on energy efficiency.

Situation

PCU's total energy costs are about 5% of total operating costs, representing an estimated \$5 million annually to fund our electrical power usage. Fuel costs for vehicles and generators project for over \$500,000 for FY23 and beyond. Redundant power systems for pump stations provide resiliency for services but increase fuel consumption. In November 2021, the Pinellas

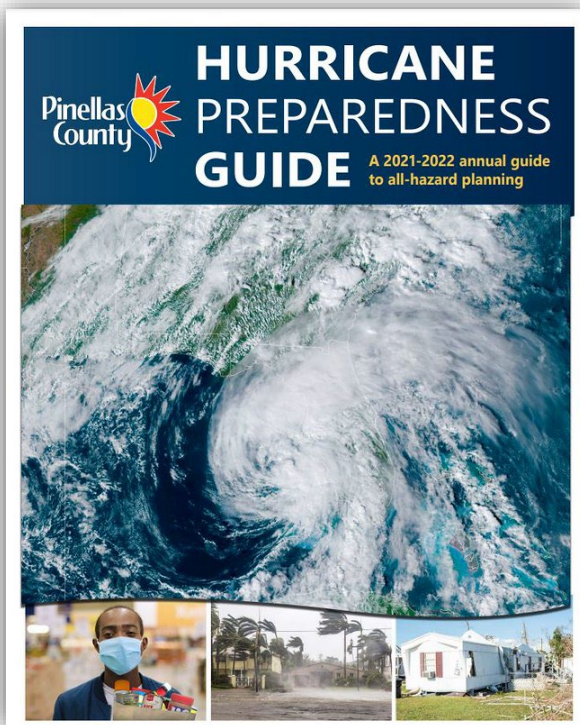
County Board of County Commissioners adopted the “Ready for 100” resolution. The resolution sets goals to transition to renewable, zero-emission clean energy through 2050.

PCU potential response

- Consider energy in best-practice identification and operational efficiency initiatives.
- Develop Energy and Electrical Master Plans.
- Review the Duke clean energy credit program.

Trend 7 Resiliency

Resiliency is a major trend in the utility sector due to sea-level rise threatening infrastructure investments and severe hurricanes, tropical storms, and rain events. In addition to natural



events, there are increasing terrorism threats and cyberattacks targeting local governments. National legislation addressed resiliency through the American Water Infrastructure Act of 2018 (AWIA), part of which requires community water systems serving more than 3,300 people to develop or update risk assessments and emergency response plans (ERPs).

Situation

We have seen a significant focus on resiliency at a regional level, as reflected by the Tampa Bay Regional Planning council’s formation of the Tampa Bay Regional Resiliency Coalition and Pinellas County’s formation of the Leadership Committee and Action Team (LCAT) to address resiliency.

PCU potential responses:

- Adopt strategies to address rising sea levels.
- Incorporate resilient designs into infrastructure improvements.
- Exercise, update, and improve emergency preparedness, safety, and security plans.
- Improve physical security at all facilities.
- Conduct regular cybersecurity training and training exercises.

Trend 8 Regional Collaboration for Water Management

While water knows no boundaries, water systems are managed by siloed areas nationwide. Across the nation, there are more than 51,000 community water systems and nearly 15,000 wastewater treatment plants. In contrast, there are only approximately 3,000 electricity providers. Overcoming this fragmentation is essential to providing high-quality water service, protecting natural resources, fueling economic prosperity, and fostering social equity.

Situation

Pinellas County has been a member of Tampa Bay Water for more than 20 years. TBW serves over 2.5 million customers in Pinellas,

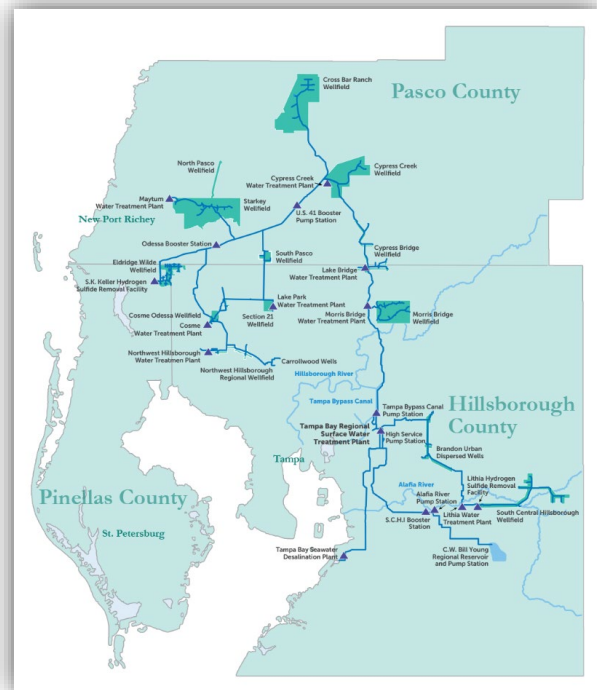
Hillsborough, and Pasco counties, making it one of Florida's largest water service providers.

Recently, TBW has incorporated potable reuse into its future master water supply plan and is currently evaluating strategies and opportunities to improve water quality and advance alternative water resources to bolster sustainable water supplies for the region. PCU must play a prominent role as a member of this robust regional water system to ensure our regional partnership remains strong now and into the future. PCU is a

Wastewater/Stormwater Partnership leader and seeks to provide a countywide unified approach to addressing SSOs. While the Pinellas County Public Works Department manages stormwater, PCU must ensure a strong and coordinated effort with the Public Works Stormwater Division to prioritize synergistic improvements that will lead to successful mitigation and elimination of SSOs in the collective wastewater systems countywide.

PCU potential responses:

- Support TBW in maintaining a robust platform for regional water supply.
- Promote the use of alternative water supplies through TBW.
- Participate in and advocate for rulemaking that furthers the adoption of a potable reuse regulatory framework.
- Lead the Wastewater/Stormwater Partnership through collaborative planning and coordination.



Trend 9 Political Environment

The political environment is growing more complex, and balancing competing interests will require actions to avoid and overcome political disagreements.

Situation

Florida recently passed the Clean Waterways Act, a wide-ranging water quality initiative. The technical advisory committee also recently adopted rules on biosolids management.

Additionally, several other legislative initiatives proposed may transform the utilities operating environment. These initiatives include the blue-green algae task force, red tide, potable reuse rulemaking, and increased regulatory pressures on SSO

mitigation. The initiatives have resulted in additional rules that have shifted water and wastewater management strategies.

PCU potential responses:

- Collaborate closely with nearby associated municipalities.
- Develop and improve relationships with the federal government and members of the congressional delegations from our service area.
- Quickly foster strong relationships with new board members.
- Work closely with other organizations with mutual interests.



Trend 10 Regulations

The national, state, and local regulatory environment continues to pressure capital and operating budgets. PCU will achieve success when most of the industry's organizational focus



can be shifted to business case-based initiatives rather than based on mandated responses to regulatory requirements. PCU expects unfunded mandates to continue and increase. For example, federal legislators seek to amend the Safe Drinking Water Act requirements to include per- and polyfluoroalkyl substances (PFAS). Some legislation designates PFAS as a superfund chemical under the Comprehensive Environmental

Response, Compensation, and Liability Act (CERCLA). Other state and local legislation also impact water and wastewater operations. Florida Senate Bill 64 was signed into law in July 2021 and required wastewater utilities to eliminate surface water discharges by 2032.

Situation

The Lead and Copper Rule revisions (LCRR) in 2021 mandated PCU tests for lead and copper in potable water at our service area's schools and childcare facilities. PCU is required to develop a lead service line inventory in the system and must comply with the LCRR by October 2024.

PCU potential response:

- Enhance participation in influencing regulations through increased industry involvement and efforts to communicate with regulators.
- PCU is in discussions with Pinellas County School Board and Pinellas County Childcare Licensing to coordinate efforts to sample drinking water in schools and childcare facilities.
- Explore alternatives to surface water discharge to meet state regulations.

SWOT Analysis

PCU recognizes that our passionate, adaptable, mission-driven workforce is one of our leading core strengths.

In conjunction with business partners from other County departments and front-line staff, PCU Leadership conducted analysis sessions to identify PCU's Strengths, Weaknesses, Opportunities, and Threats (SWOT). PCU identified and considered the following points in developing the PCU Strategic Plan.

Strengths <ul style="list-style-type: none">• Reliable service• Public & elected leaders' confidence• Passionate, knowledgeable, adaptable, mission-driven workforce• Equipment, tools, and facilities• Widely recognized research & education program	Weaknesses <ul style="list-style-type: none">• Communication• Data management (metrics, storage, analytics & technology)• Recruiting and maintaining a skilled workforce• Employee development, accountability, and coaching• Aging infrastructure
Opportunities <ul style="list-style-type: none">• Technology advances• Succession planning• Partnership engagements• Enterprise Asset Management program• Enhanced outreach• H.R. workforce connection committee	Threats <ul style="list-style-type: none">• Legislation & regulations• Emerging contaminants• Security (Cyber and physical)• Environment/natural/health disaster

Upon completing the SWOT analysis and update, PCU senior leaders reviewed and aligned strengths and opportunities to determine how best to leverage them to correlated weaknesses and threats. A summary of the key findings is below:

- Our opportunity for enhanced community outreach could achieve gains in our communication weaknesses.
- Opportunities for technological advancement could close the gap in our data management needs.

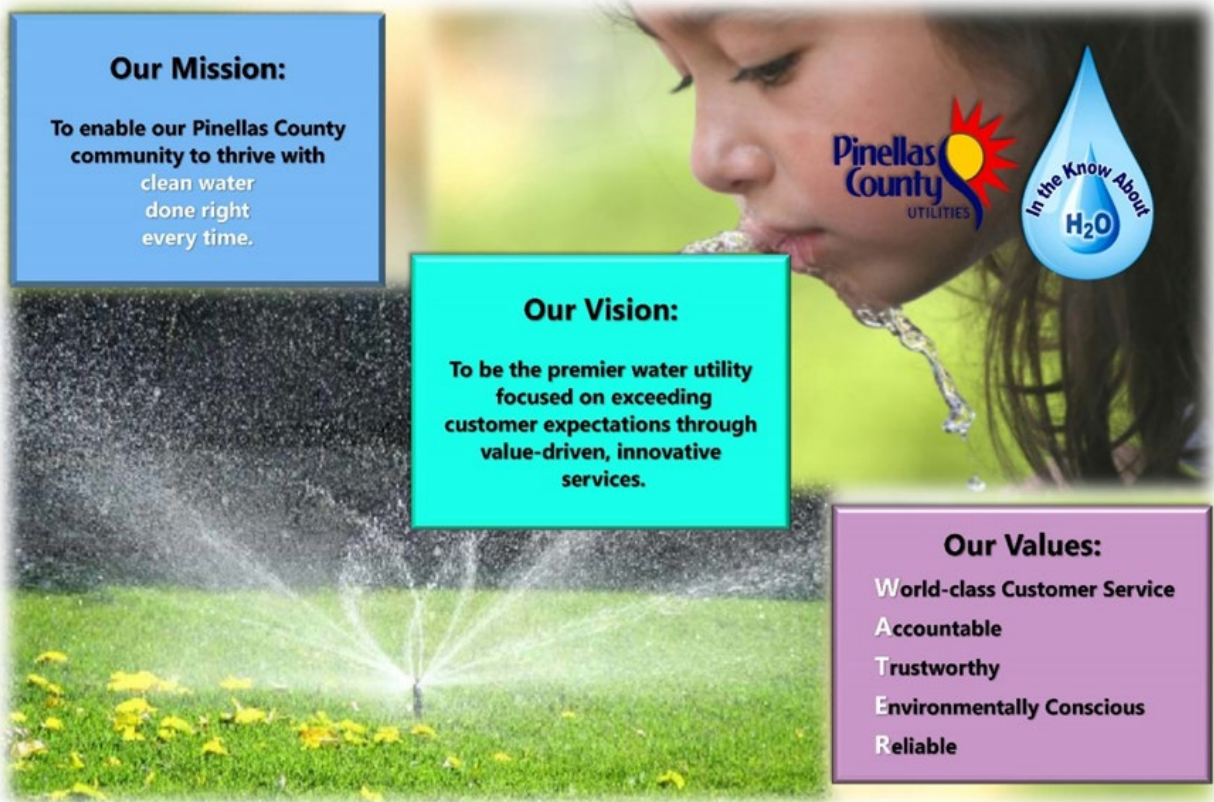
- Our workforce challenges could be addressed through an active partnership with the Human Resources Workforce Connections group and empowering our passionate, knowledgeable, adaptable, and mission-driven workforce.



- The PCU Enterprise Asset Management (EAM) program will enable our team to develop the best approach for infrastructure preventative and restorative efforts.
- The reputation and the solid relationship we have established with the public and our elected leaders will aid in our efforts to inform the debate and consideration of federal, state, and local legislation and regulation.
- PCU's widely recognized research program enables us to remain vigilant and proactive as emerging contaminants appear on the horizon.
- Technological advances enable us to provide a robust defense strategy in cybersecurity.

Mission, Vision, and Values

PCU's mission, vision, and values closely align with the BCC. PCU's mission is reflective of our commitment to reliable services. Our customers can depend on us to deliver clean water done right every time.



PCU's mission reflects the continuous commitment and strength of providing reliable services. Our vision captures PCU's understanding of the need to promote and embrace innovation throughout the organization to face future infrastructure challenges while balancing customer costs. PCU's values spell the word "WATER" and align with the core principles we seek to embrace when attracting talent to the organization. Our customers have entrusted us to provide them with their most valuable resource, and we aim to deliver on that promise.

10 Strategic Goals

PCU identified and expanded the following ten goals to align with the Effective Utility Management manual. This comprehensive set of goals fully encompasses what a highly effective utility should aspire to achieve.

Product Quality

- Meets or surpasses regulatory and reliability requirements
- Operates consistently with customer, public health, economic, and ecological needs

Operational Optimization

- Conducts ongoing performance improvements informed by performance monitoring
- Minimizes resource use and loss from day-to-day operations
- Is aware of and adopts promptly operational and technology improvements, including operational technology and informational technology
- Manages and utilizes data from automated and smart systems



Financial Viability

- Understands and plans for full lifecycle cost of utility
- Effectively balances long-term debt, asset values, operations and maintenance expenditures, and operating revenues
- Sets predictable and adequate rates to support current utility needs and plans to invest in future needs while considering affordability and the needs of disadvantaged households when setting rates

Infrastructure Strategy & Performance

- Understand the condition of and costs associated with critical infrastructure assets
- Maintains and enhances assets over the long-term at the lowest possible lifecycle cost and acceptable risk
- Coordinates repair efforts within the community to minimize disruptions
- Plans infrastructure investments consistent with community needs, anticipated growth, system reliability goals, and with a robust set of adaptation strategies

Employee & Leadership Development

- Recruits, develops, and retains a competent, safety-focused workforce
- Promotes a collaborative organization dedicated to continual learning, improvement, and adaptation
- Implements procedures for institutional knowledge retention, workplace safety, and continual learning (e.g., standard operating procedures)
- Invests in and provides opportunities for professional and leadership development
- Supports an integrated and well-coordinated senior leadership team

Customer Satisfaction

- Provides reliable, responsive, and affordable services
- Receives timely customer feedback
- Is responsive to customer needs and emergencies
- Provides tailored customer service and outreach to a range of customer groups (e.g., residential, commercial, industrial, and newly emerging groups such as high-strength waste producers and power companies)



Stakeholder Understanding & Support

- Engenders understanding and support from oversight bodies, community and watershed interests, and regulatory bodies for service levels, rate structures, operating budgets, capital improvement programs, and risk management decisions
- Actively engages in partnerships and involves stakeholders (anyone who can affect or be affected by the utility) in the decisions that will affect them
- Actively promotes an appreciation of the true value of water and water services and water's role in the social, economic, public, and environmental health of the community

Enterprise Resiliency

- Works together with staff internally and coordinates with external partners to anticipate challenges and avoid problems
- Proactively establishes tolerance levels and effectively manages risks (including legal, regulatory, financial, environmental, safety, security, cyber, knowledge-loss, talent, and natural disaster-related)
- Plans for and actively manages to maintain business continuity



Community Sustainability

- Actively leads in promoting and organizing improvements to community and watershed health within the utility and with external community partners
- Actively leads in promoting welfare within the community for disadvantaged households
- Uses operations to enhance the natural environment
- Efficiently uses water and energy resources, promotes economic vitality, and engenders overall community improvement
- Maintains and enhances ecological and community sustainability, including pollution prevention, watershed, and source water protection

Water Resource Sustainability



- Ensures water availability through long-term resource supply and demand analysis, conservation, fit-for-purpose water reuse, integrated water resource management, watershed management and protection, and public education initiatives
- Manages operations to provide long-term aquifer and surface water sustainability and replenishment
- Understands and plan for future water resource variability (e.g., changing weather patterns, including extreme events, such as droughts and flooding).

Reference [Appendix D](#) for the goals' road map.

Goals, Outcomes, & Strategies

PCU developed an organization-specific outcome to embody successful goal achievement. PCU identified strategies that needed to be accomplished to meet each goal's desired outcome. Below are the ten goals, desired outcomes, and associated strategies.



Goal 1 Product Quality (P. 2.)

Outcome Statement: Provide Superior, Reliable Water Resources to Pinellas County

Strategies:

1. Comply with local, state, and federal requirements.
2. Provide drinking water that surpasses requirements and protects public health.
3. Mitigate public exposure to lead and copper in drinking water.
4. Reduce, mitigate, or eliminate Sanitary Sewer Overflows (SSOs).
5. Advocate for attainable water quality and environmental legislation based on sound science, protecting public health and the environment.

Goal 2 Operational Optimization (O. O.)

Outcome Statement: Be an Innovative Industry Leader

Strategies:

1. Determine and assess current performance measures.
2. Work with REM to assess future spacing needs in the countywide space evaluation.
3. Develop a plan for the cost of operational service with Raftelis.

Goal 3 Financial Viability (F.V.)

Outcome Statement: Assure Financial Strength and Understanding

Credit Metrics	2014	2015	2016	2017	2018	US Median	Credit Trend
Annual Debt Service Coverage (x)	2.24x	2.68x	2.47x	2.73x	2.38x	1.90x	Stable
Days Cash on Hand (Days)	590	687	677	650	543	565	Stable
Debt to Operating Revenues (x)	2.4x	2.2x	2.0x	1.8x	1.7x	2.5x	Improved
Median Family Income (% of US Median)	93%	93%	92%	92%	92%	99%	Stable
Remaining Useful Life of Capital Assets (Years)	34	33	33	32	31	30	Stable

Debt and Financial Data (\$000s)	2014	2015	2016	2017	2018	US Median
Net Funded Debt	\$168,075	\$160,530	\$149,752	\$140,067	\$132,138	\$40,881
Total Revenues	\$70,767	\$74,540	\$75,367	\$80,998	\$78,534	\$20,481
Operating and Maintenance Expenses	\$38,410	\$37,823	\$39,834	\$41,937	\$43,773	\$10,048
Net Revenues	\$32,357	\$36,717	\$35,533	\$39,061	\$34,761	\$8,998
Debt Service	\$14,454	\$13,725	\$14,388	\$14,310	\$14,629	\$3,813

Governance/Legal Provisions	Score
Rate Management	Aa
Regulatory Compliance and Capital Planning	Aa
Rate Covenant	A
Debt Service Reserve Requirement	Aa

Strategies:

1. Analyze and implement user fees every four years to ensure appropriate cost allocation and regional benchmarking.
2. Analyze and implement water, sewer, and reclaimed rates every four years to ensure revenue sufficiency.
3. Ensure financial transparency with all stakeholders.
4. Seek supplemental funding.
5. Establish rate and billing practices that provide enhanced affordability.

Goal 4 Infrastructure Strategy & Performance (I.S.)

Outcome Statement: Proactively manage infrastructure to meet current and future needs

Strategies:

1. Obtain ISO 55000 certification.
2. Develop long-range plans to meet public service demands and maintain infrastructure reliability and sustainability.
3. Develop a GIS plan for data collection and condition assessment plan for assets.
4. Ensure 85% of all Capital Improvement Plan (CIP) projects are on schedule.
5. Continue to improve water infrastructure to maintain and improve product quality and comply with regulatory obligations.

Goal 5 Employee & Leadership Development (ED)

Outcome Statement: Develop, maintain, and recruit a high performing workforce

Strategies:

1. Develop a recruitment plan for the Utilities Department.
2. Enhance employee development and advancement opportunities.
3. Develop a succession management plan for key leadership positions (supervisory and above/5-year retirement eligibility).
4. Develop individual performance measures and goals.
5. Support a culture of innovation and employee feedback.



Goal 6 Customer Satisfaction (C.S.)

Outcome Statement: Inspire Customer Confidence, Enhance Communication, and Perception

Strategies:

1. Develop a department-wide communication plan with internal department communications and external customer outreach.
2. Enhance customer satisfaction.

Goal 7 Stakeholder Understanding & Support (S.S.)

Outcome Statement: Be a trusted and collaborative partner

Strategies:

1. Strengthen existing stakeholder partnerships annually.
2. Form new partnerships to improve public outcomes for Pinellas County.



Goal 8 Enterprise Resiliency (E.R.)

Outcome Statement: Effectively manage risks

Strategies:

1. Maintain and Update the Emergency Management Plan.
2. Grow interagency partnerships.
3. Develop and adopt innovative sciences and technologies into PCU processes.
4. Annually review and incorporate goals and strategies of the Sustainability and Resiliency Leadership Committee and Action Team (LCAT).
5. Meet the requirements of AWIA every five years.
6. Enhance Energy Management and Electrical System Resiliency.

Goal 9 Community Sustainability (S.U.)

Outcome statement: Fulfill our role as leaders in the entire community

Strategies:

1. Enhance resource recovery and reduce or eliminate adverse environmental impacts from biosolids.
2. Support regional businesses through actively participating in the Small Business Enterprise Program (SBE).
3. Develop enhanced recruitment initiatives that support community growth and vitality.

Goal 10 Water Resource Sustainability (W.S.)

Outcome Statement: Protect and manage water resources

Strategies:

1. Support alternative water resources to enhance the sustainability of the water supply for the region.
2. Determine methods for the reduction of water loss.
3. Implement system-wide Advanced Metering Infrastructure (AMI).
4. Ensure the PCU reuse and surface water discharge strategies meet Senate Bill 64 standards.



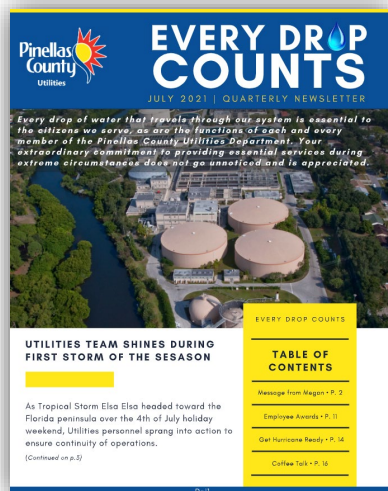
Communication Plan

PCU believes in open and honest conversations with our employees. Continuous and deliberate communication is vital to the collaboration needed to inspire innovation and achieve plan goals.

PCU has diverse internal and external stakeholders who will be interested in and impacted by these strategic planning efforts. Clear, frequent, and varied communication regarding the plan is essential to securing buy-in and ensuring transparency. The following will be the minimum communication channels used to communicate the strategic plan elements and revisions.



Coffee Talk – Quarterly information conversations with staff and the department leadership team throughout different facilities in Utilities, providing a forum for employees to learn about the strategic plan, among other possible topics.



Virtual Engagement – The Department Director and Deputy Director will attend staff meetings at all sites to review and present the strategic plan. Additionally, a strategic plan annual webinar will be held on Microsoft Teams for all staff to view and recorded for night shift employees. Finally, leadership will host regular “Ask me Anything” virtual open forums for PCU employees to ask leadership questions on any topic, including the strategic plan.

PCU Newsletter – PCU quarterly newsletter will include a regular feature regarding some aspect of the strategic plan – whether a highlighted goal, recent accomplishment, spotlighted team member’s efforts, infographic, or other newsworthy items. Printed newsletters will be available in

common areas to improve readership.

Regular Meetings – PCU division directors, managers, and supervisors will integrate strategic plan updates into their regular staff meetings. Individual employees must understand how their work contributes to the plan goals and outcomes.

Implementation & Monitoring Plan

Implementation of the Strategic Plan is a critical step to achieving successful outcomes. PCU has established a dual operating system approach to implementation by establishing cross-functional teams led by department leadership. This method breaks through standard operating organizational models to spark innovative and creative approaches and methodologies to achieve enhanced outcomes.

Implementation Plan

The Deputy Director oversees the strategic plan implementation process. The implementation team consists of goal leaders assigned to the ten strategic plan goals and a director over the goal leader, serving as a goal champion. PCU update the definitions of goal leader and goal champion in 2022 from previous versions of the Strategic Plan.

Goal Leaders



The Department Director selected the goal leaders in coordination with the Deputy Director and Division Directors. Goal leaders are senior staff within the department with significant experience. Each goal leader is responsible for selecting cross-functional action teams to assist in implementing each goal area. Action teams may consist of internal and external stakeholders that will bring value to accomplishing the desired strategies in each plan goal. Outlined below are the responsibilities of the goal leaders:

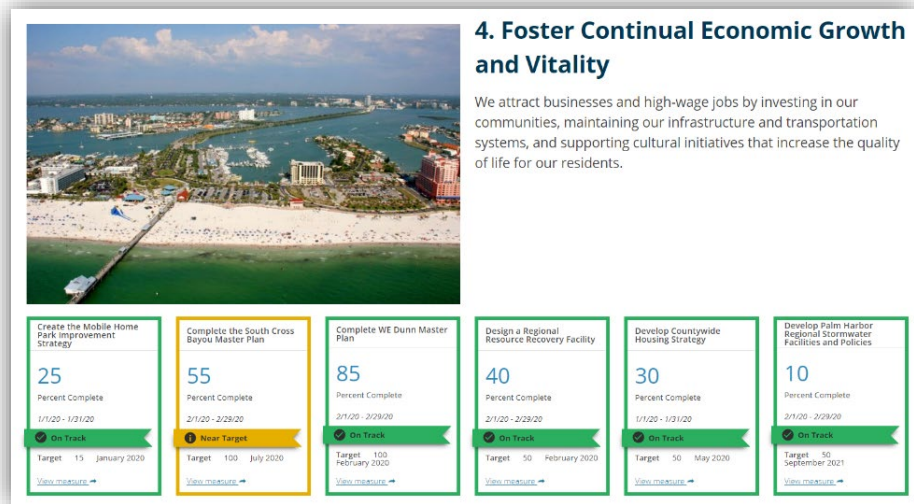
- Develop timelines for implementation
- Oversee assignments and tracking
- Recommend improvements to plan objectives
- Assist in communicating goal objectives

Monitoring Plan

PCU provides consistent monitoring of goals and strategies through existing tools and reporting.

The existing countywide work plan tracking tool on SharePoint monitors the progress of the strategic plan. Each item within the department’s work plan includes an associated strategic plan goal that aligns with the work plan.

Each work plan item is a strategy, objective, or tactic associated with the goal area. Work plan items are updated monthly and posted to the Socrata dashboard for tracking and monitoring by all internal stakeholders. The Deputy Director develops quarterly reports to assess progress with the assistance of goals leaders. See the department’s Strategic Communications, Implementation, and Monitoring Plan for more details about these elements; [click here](#).



Strategic Planning Process

The annual planning process is a continuous cycle that aligns with budgeting timelines to ensure adequate funding is coordinated with the strategic plan goals and priorities.

Strategic planning is a continual process throughout the year. To ensure consideration of all stakeholders' input, PCU has developed an annual strategic planning process that allows for the evolution of changing needs to be incorporated into the planning process. The steps of the planning process are below.

Department staff feedback and senior staff workshop – October/November

Workshops comprised of focus groups from department staff and senior leadership. Any revisions or updates needed based on department feedback will be documented for incorporation into the plan.

BCC Strategic Plan workshop – January

The BCC holds an annual strategic planning workshop led by the County Administrator. Any items brought forth on PCU will be evaluated and incorporated into the strategic plan.

County Administration workshop – December/January

Department Director will meet with county administration to review the updated trends, goals, and strategies. Workshop feedback is incorporated into the plan.

Finalize Strategic Plan – March

All feedback and input will be incorporated into the plan modifications by the end of March. Goal owners and action teams will be confirmed.

Communicate and Implement Strategic Plan – April/May

The department will communicate plan modifications and implementation to staff and stakeholders following the communication plan referenced in this document.



Appendix A – Accomplishments

The following represents accomplishments that have been (100%) completed as of March 2022.

GOAL	Accomplishments
P.Q.	Compiled list of all schools and childcare facilities in the County service area in preparation for lead and copper sampling
P.Q.	Maintain a capacity, management, operations, and maintenance (CMOM) program
F.V.	Bond-rating increase from stable to positive
F.V.	Refinance sewer bonds to provide savings
F.V.	Develop a plan for the cost of service
I.S.	Update RFP for Wastewater Collection System Master Plan to include the development of criticality for all horizontal assets.
I.S.	Migrate cost of ownership lifecycle data into ESRI/GIS.
I.S.	Implement a map correction and onboarding decommissioning process.
I.S.	Ensure 85% of all CIP projects are on schedule
I.S.	Review and update project schedules monthly and quarterly with Director.
I.S.	Partner with OMB to improve planning and execution
I.S.	Provide leadership and coordination for Wastewater/Stormwater partnership.
E.D.	Recruit at the Lealman Career Fair
E.D.	Develop a recognition program
E.D.	Continue the DLIU Leadership Development Program. (Start New Explorer-Summer 2021, Coach kickoff for Fearless and Navigator Spring 2021)
S.S.	Identify different communication methods
S.S.	Encourage communication and camaraderie
S.S.	Provide leadership and coordination for the Wastewater/Stormwater partnership
E.R.	Meet requirements of AWIA
E.R.	Update Emergency Response Plan
E.R.	Create a Disaster Master Plan
S.U.	Create Jail to Jobs and Veterans in Water recruiting program
S.U.	Increase minimum thresholds for SBE firms from 5% to 10% on capital improvement projects where possible.
S.U.	Review the SBE consultant list for use on all projects. (<=100K)
W.S.	Develop PCU position on alternate water sources

Appendix B – PCU Customers

PCU provides retail and wholesale water, sewer, and reclaimed water services to municipalities throughout the County. Retail customers are municipalities we provide services for and control the distribution systems for said services. Wholesale customers purchase our services through a single meter and control the distribution system beyond the billed connection. Below is a list of retail and wholesale customers.

Potable Water		
Retail	Wholesale	Other
<ul style="list-style-type: none"> ▪ Belleair Beach ▪ Belleair Bluffs ▪ Belleair Shore ▪ Indian Rocks Beach ▪ Indian Shores ▪ Kenneth City ▪ Largo ▪ Madeira Beach ▪ North Redington Beach ▪ Redington Beach ▪ Redington Shores ▪ St. Pete Beach ▪ Seminole ▪ Treasure Island 	<ul style="list-style-type: none"> ▪ Clearwater (partial) ▪ Pinellas Park ▪ Safety Harbor ▪ Tarpon Springs 	<ul style="list-style-type: none"> ▪ Belleair⁵ ▪ Oldsmar⁵ ▪ Dunedin⁵ ▪ Saint Petersburg⁶

Sewer	
Retail	Wholesale
<ul style="list-style-type: none"> ▪ Belleair ▪ Belleair Beach ▪ Belleair Bluffs ▪ Belleair Shore ▪ Indian Rocks Beach ▪ Indian Shores ▪ Kenneth City (partial) ▪ Madeira Beach ▪ Redington Beach ▪ Seminole 	<ul style="list-style-type: none"> ▪ North Redington Beach ▪ Pinellas Park ▪ Redington Shores

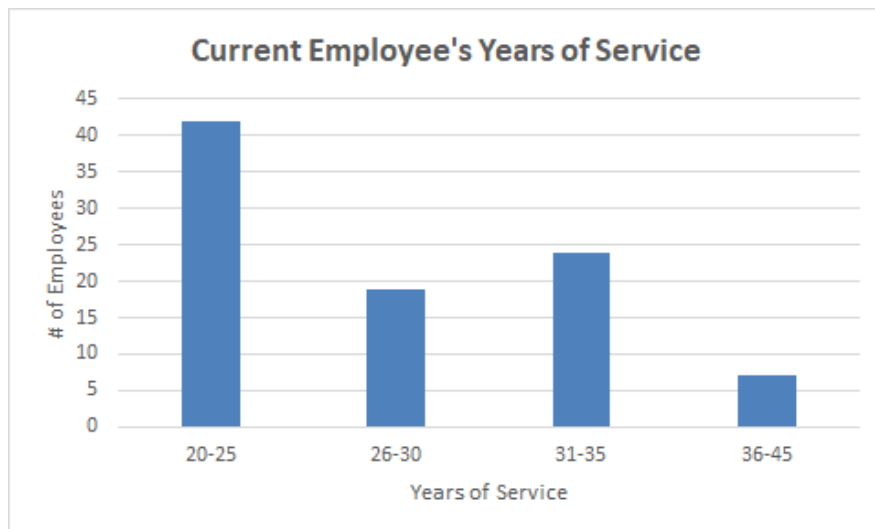
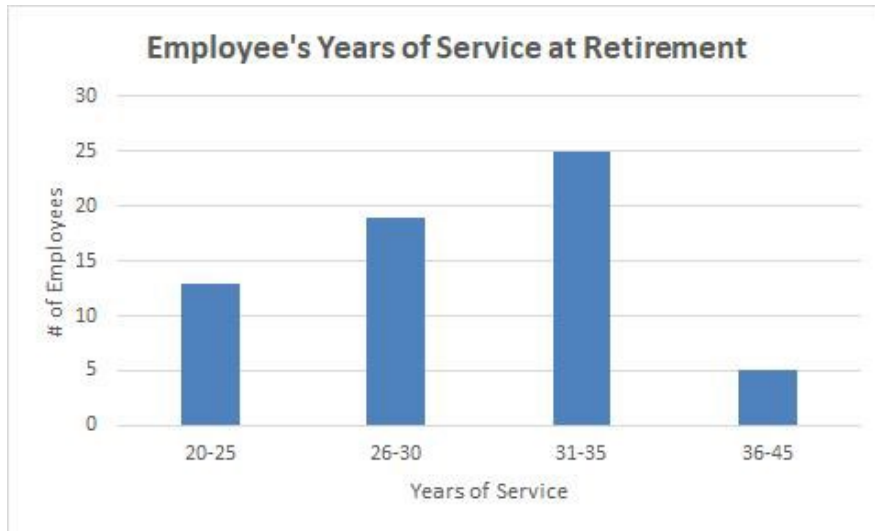
⁵ Wholesale water inactive connection (backup)

⁶ Emergency interconnect

Reclaimed	
Retail	Wholesale
<ul style="list-style-type: none"> ▪ Belleair Bluffs ▪ Indian Rocks Beach ▪ Madeira Beach ▪ North Redington Beach ▪ Redington Beach ▪ Redington Shores ▪ Seminole ▪ Treasure Island 	<ul style="list-style-type: none"> ▪ Belleair ▪ Pinellas Park ▪ St. Pete Beach ▪ South Pasadena

Appendix C – Workforce Data

The following represents PCU workforce data as of December 15, 2021.



Year	2017	2018	2019	2020	2021
Number of Retirements	12	16	12	19	24
Total Number of Separations	33	41	48	51	73
Number of Hires	51	46	49	49	59

Appendix D – Road Map

Goal 1 Product Quality	1.1 Compliant with local, state, and federal requirements 1.2 Provide drinking water that surpasses requirements and protects public health 1.3 Mitigate public exposure to lead and copper in drinking water. 1.4 Reduce, mitigate, or eliminate SSOs. 1.5 Advocate for water quality and environmental legislation that are based on sound science, are protective of public health and the environment, and are attainable.	68%
Goal 2 Operational Optimization	2.1 Determine and assess current performance measures. 2.2 Enhance Energy Management and Electrical System Resiliency. 2.3 Work with REM to assess future spacing needs (14 S. Fort Harrison) part of countywide space evaluation (STANTEC). 2.4 Develop a plan for cost of operational service with RAFTILIS (Isaiah)	32%
Goal 3 Financial Viability	3.1 Analyze and implement user fees every four years to ensure appropriate cost allocation and regional benchmarking. (External) 3.2 Analyze and implement water, sewer, and reclaimed rates every four years to ensure revenue sufficiency. 3.3 Ensure financial transparency with all stakeholders. 3.4 Seek supplemental funding.	84%
Goal 4 Infrastructure Strategy and Performance	4.1 Obtain ISO 55000 certification for PCU 4.2 Develop long-range plans to meet Public service demands and maintain infrastructure reliability and sustainability. 4.3 Develop GIS plan for data collection and condition assessment plan for assets. 4.4 Ensure 85% of all CIP projects are on schedule. 4.5 Continue to improve water infrastructure to maintain and improve product quality and comply with regulatory obligations.	99%
Goal 5 Employee & Leadership Development	5.1 Develop a recruitment plan for Utilities department. 5.2 Enhance employee development and advancement opportunities. 5.3 Develop a succession management plan for key leadership positions (supervisory level or above, 5-year retirement eligibility). 5.4 Develop individual performance measures and goals. 5.5 Support a culture of innovation and employee feedback.	78%
Goal 6 Customer Satisfaction	6.1 Develop Department-wide communication plan. Internal department communications and external customer outreach. 6.2 Enhance customer satisfaction.	73%
Goal 7 Stakeholder Understanding & Support	7.1 Strengthen existing stakeholder partnerships annually. 7.2 Form new partnerships to improve public outcomes for Pinellas County.	50%
Goal 8 Enterprise Resiliency	8.1 Maintain and Update Emergency Management Plan. 8.2 Grow interagency partnerships. 8.3 Develop and adopt innovate, science, and technology in our processes. 8.4 Annually review and incorporate goals and strategies of the sustainability and resiliency leadership committee and action team (LCAT). 8.5 Meet requirements of AWIA every 5 years. 8.6 Enhance Energy Management and Electrical System Resiliency.	52%
Goal 9 Community Sustainability	9.1 Enhance resource recovery and reduce or eliminate adverse environmental impacts from biosolids. 9.2 Support regional businesses through actively participating in the Small Business Enterprise Program (SBE). 9.3 Develop enhanced recruitment initiatives that support community growth and vitality. 9.4 Establish rate and billing practices that provide enhanced affordability.	37%
Goal 10 Water Resource Sustainability	10.1 Support alternative water resources to enhance sustainability of the water supply for the region. 10.2 Determine methods for reduction of water loss. 10.3 Implement system wide AML. 10.4 Reuse strategy and surface water discharge to meet Senate Bill 64 standards (SCB w/ Nory)	38%

Resources & Acknowledgements

Cover photo provided courtesy of Pinellas County Marketing and Communications.

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ATTACHMENT C

STRATEGIC
COMMUNICATION,
IMPLEMENTATION &
MONITORING PLAN
2020-2025
2022



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Summary

Pinellas County Administration approved the Utilities Strategic Plan in April 2020, and it includes planned strategic department initiatives for the next five years. The utility work plan tracks the progress of the ten goals, objectives, and strategies on the SharePoint site. Pinellas County Utilities (PCU) implemented the following components as part of the communication and achievement of the 2020-2025 plan. The components facilitate consistent communication of goal teams' progress and updates on initiatives and objectives.

Communication

Frequent and diverse methods of communication of the plan and strategic initiatives are essential in seeking stakeholder buy-in and ensuring transparency. The following are some options that Pinellas County Utilities (PCU) has implemented to disseminate information and seek opinions and input from the department.

Within PCU, a goal leader leads each of the ten strategic goals. Goal leaders are selected staff members throughout PCU. Each goal leader has formed a cross-departmental committee to analyze the strategies, formulate the objectives and clarify the tactics, including intended outcomes and milestones. Activities of the committees, and details of the plan itself, will be shared through:



Coffee Talk

Quarterly information conversations between staff and PCU leadership are hosted at facilities throughout Utilities, providing a forum for employees to learn about the strategic plan, among other possible topics.

Road Shows & Live Webinars

To reach the most staff, goal leaders and PCU leaders host virtual live meetings and visit worksites to have informal meetings about the latest and greatest happening in PCU, strategically speaking.

Ask Me Anything

PCU conducts regular “Ask me Anything” events that include discussions on the strategic plan, goals, strategies, and initiatives.

Department Presentations and Q & A

The Director and Deputy Director will present the plan and any revisions to PCU staff and stakeholders annually.

Leadership Strategic Initiatives “Pipeline”

The framework has been created for PCU Leadership and includes strategic initiatives for research and assessing department needs and feasibility. Leadership has laid out a plan and foundation for strategic initiatives and loaded them into the strategic pipeline. The goal leaders ultimately champion these initiatives.

Achievement Ranking Survey

A goal achievement ranking self-assessment and benchmark will be performed by PCU yearly. This assessment is needed to guide our efforts to the areas we need to improve the most.

Goal Leader Update Webinars

Goal team leaders provide department-wide updates throughout the year and seek goal action team participation.

Annual Review Meeting

Leadership and management schedule an annual retreat to discuss and review any changes needed for the following year.

Organizational Strategic Communications Plan

Business & Customer Services Division

The Business & Customer Services Division is currently engaging staff and sharing information about the strategic plan and goals by relating them to the multiple department-wide projects involving Business & Customer Services. The Business & Customer Service Division shares information about multiple strategic goal projects to enhance staff members’ involvement and engagement opportunities.

Customer Services Section

- ✓ The Customer Services Manager will host monthly meetings with the Customer Service Supervisors.
- ✓ The Customer Service Supervisors will host monthly meetings with their

- respective working sections.
- ✓ Strategic plan goals will be discussed monthly, with each section ensuring understanding of each goal and strategy.
 - ✓ Monthly or quarterly team meetings will be held (depending on the team's schedule) where supervisors and the manager will discuss and share Division, Department, and County information with staff.

Field Services Section

- ✓ The Field Services Manager will host monthly meetings with the entire Field Services staff and communicate the strategic plan and goals and any changes or updates from the Division, Department, and County.
- ✓ Field Services' supervisor will conduct a daily and weekly team meeting before the start of the day and include strategic goals and how they relate to the staff's day-to-day activities.

Administrative Services Section

- ✓ The team is involved in developing and updating the strategic plan, regularly communicating with executive leadership and each other regarding status and progress made.

Engineering

A dedicated agenda item related to the Utilities Strategic Plan is scheduled for all monthly staff meetings. Discussions about a highlighted strategic goal and how it relates to the team and the benefit to Pinellas County, our customers, the County, the region, and the environment will occur. Goal leaders are asked to attend staff meetings or contribute information to be included during meetings about strategic goals and initiatives.

Horizontal Engineering Section

- ✓ The Horizontal Engineering Section will be encouraged to tie a strategic plan goal or multiple goals to each project throughout the planning, design, bid, construction, and as-built phases.
- ✓ The team attends monthly Engineering Division meetings to learn more about strategic goals and their application to their day-to-day activities.

Engineering Technical Services Section

- ✓ The Engineering Technical Services Section communicates effectively, so that daily work is in alignment with the strategic plan.
- ✓ The team attends monthly Engineering Division meetings to learn more about strategic goals and their application to their day-to-day activities.

Vertical Engineering Section

- ✓ The Vertical Engineering Section will host random interactive discussions

- about the strategic plan between section managers and employees.
- ✓ As either team members or goal leaders, staff members are active participants in goal teams.
- ✓ Managers, supervisors, and team members will discuss how projects “tie in” to the strategic plan at project meetings.

Maintenance Division

The Maintenance Division is approaching this initiative as a unified front to ensure consistency within all maintenance sections and increase cohesiveness and understanding of how the strategic plan goals affect us all. Goal leaders are asked to attend staff meetings or contribute information to be included during meetings about strategic goals and initiatives. Strategic plan goal visual aids, posters, and graphics will be created to tie each team member’s core function with the strategic plan and Pinellas County Utilities’ mission, vision, and values. Pinellas County Utilities’ Strategic Plan will be reviewed during the recruitment process and orientation for new entry-level positions. For non-entry level positions, a practical exercise will be conducted during the interview process. Creative activities, such as *Stump the Director*, *Jeopardy*, and *Goal Strategy Match* will be implemented.

Repair & Maintenance Section

- ✓ During the Maintenance Division All-Staff Meetings, the Repair and Maintenance section reviews at least one strategic plan goal every month. These monthly reviews will allow our teams to ask relevant questions and better understand each goal’s outcome, including how it ties back to their job functions. In addition, the Operations Managers cover at least one strategic plan during their monthly meetings with their staff.
- ✓ As a division, we will be purchasing two banners for each location, the North and South Maintenance buildings, to display the strategic goals for everyone to see.
- ✓ We have displayed the metrics on boards for the Repair & Maintenance section in the North and South offices. In addition, we will include a note on each metric document to indicate what strategic goal(s) each metric relates to.
- ✓ Ensure all our staff members have a strategic goals card.

Technical Services Section

- ✓ The Technical Services section also plans to participate in reviewing one strategic plan goal every month during the Maintenance Division All-Staff Meetings. These monthly reviews will allow our teams to ask relevant questions and better understand each goal’s outcome, including how it ties back to their job functions.
- ✓ As a division, we will be purchasing two banners for each location, the North and South Maintenance buildings, to display the strategic goals.

- ✓ Beginning in March 2022, the Technical Services section will include a note on each metric document that indicates what strategic goal(s) each metric relates to. These metrics are displayed electronically and on bulletin boards within Technical Services, and the metrics for the Warehouse and Support section will also be displayed electronically. Furthermore, we will add a slide that is changed monthly discussing a strategic goal and how it relates to our fieldwork in Technical Services.
- ✓ Ensure all staff members have been issued a strategic goals card.

Warehouse and Support Section

- ✓ The Warehouse and Support section will also tie their metrics to a strategic goal and display them on each work group's metric boards. Also, our metrics will be displayed in both Technical Services and Repair & Maintenance monitor presentations.
- ✓ As a division, we will be purchasing four more banners to display the strategic goals and be placed at the entrance and rear of the South Maintenance building and training room and outside the warehouse at North Maintenance.
- ✓ We will also start conducting team-building exercises where the topic will be one of the strategic goals.
Ensure all staff has been issued a strategic goals card

Operations Division

The Operations Division highlights one of the Operation Section's efforts to engage staff about Pinellas County Utilities' strategic plan and goals at the monthly manager's meeting. Employee engagement, questions, and feedback are discussed, and challenges and solutions to increase two-way discussions.

William E. Dunn Advanced Water Reclamation Facility

- ✓ At the monthly staff meetings for the William E. Dunn Water Reclamation Facility, team members will review the strategic plan and how it pertains to the staff's day-to-day activities.
- ✓ William E. Dunn Water Reclamation Facility team members will be encouraged to create opportunities for brainstorming about projects that align with the plan and recognize the team's effort and ideas that contribute to strategic goals.
- ✓ Guests and goal leaders will be invited to participate in the William E. Dunn Water Reclamation Facility's virtual meetings for an outside perspective and review goal updates and initiatives.
- ✓ Strategic goals will be tied into budget discussions during the planning and budget session, including how each process or operation parameter may affect the budget or the strategic goal.

- ✓ Daily discussions will occur with staff members about the work they are performing and how the work relates to a strategic goal and Pinellas County Utilities' mission, vision, and values.
- ✓ Will discuss when review of projects how and why this is being evaluated as pertaining to the strategic goals.

South Cross Bayou Advanced Water Reclamation Facility

- ✓ The South Cross Bayou Advanced Water Reclamation Facility team will incorporate one strategic plan goal at each monthly staff meeting.
- ✓ Strategic goals will be highlighted to connect the strategy, objective, or tactic to the staff's day-to-day role.
- ✓ Open dialogue will be encouraged to create brainstorming opportunities about projects that align with the plan; staff members will be recognized for their contributions during the discussions.
- ✓ The South Cross Bayou Advanced Water Reclamation Facility team will be encouraged to participate in strategic goal teams.
- ✓ The South Cross Bayou Advanced Water Reclamation Facility team will host weekly presentations on each goal and highlight the strategies, objectives, and tactics related to South Cross Bayou Advanced Water Reclamation Facility staff's day-to-day roles.
- ✓ One staff member will be assigned to reach out and connect with a strategic goal team based on these presentations.
- ✓ Guests and goal leaders will be invited to South Cross Bayou Advanced Water Reclamation Facility virtual meetings for an outside perspective and review goal leader updates and initiatives as a source of inspiration.
- ✓ Communication boards will be created and placed in high-traffic areas to highlight the strategic plan.
- ✓ Bound versions of the strategic plan will be placed in the Control Room and other common areas for staff review.

SK Keller Water Treatment Facility

- ✓ The SK Keller Water Treatment Facility staff will host in-depth discussions highlighting one specific goal and its relation to the team's day-to-day activities, the benefits to Pinellas County Utilities, customers, the County, the region, and the environment taking place during Water Supply and Transmission staff meetings.
- ✓ Goal leaders will be requested to attend staff meetings and provide updates and information about the strategic goal they are leading and the underway initiatives.
- ✓ Strategic goal trivia games and other creative interactive activities will be conducted to engage staff members about the strategic plan and goals.
- ✓ The strategic goals and narratives are posted in the training room.
- ✓ During strategic goals discussions employees will be encouraged to participate in the discussions and join goal teams.

- ✓ Updates on statuses and timelines will be provided regularly.
- ✓ Will discuss how ongoing projects fit with the strategic goals.
- ✓ Supervisors will assist employees in identifying how their day-to-day tasks are related to strategic goals.

Water Quality and Data Management Division

The Water Quality Division-wide approach includes collaborative presentations to staff on how the strategic goals and initiatives impact water quality. There are discussions about the strategic plan and updates and timelines for the strategic leadership pipeline during regular staff meetings. The Utilities Strategic Plan has been incorporated as a standing agenda item at each Water Quality Division's quarterly meetings. Strategic goal team leaders are invited to be guest speakers at staff meetings and share information about strategic goals and initiatives. For each goal, the outcome statement is discussed, and how the work produced by the Water Quality team aligns with the strategies we have adopted to achieve the goal.

Logan Laboratory Section

- ✓ The Logan Laboratory Section supervisors will distribute weekly emails listing 1-2 goals and comment on how specifically the laboratory staff can impact the goals within their job responsibilities.
- ✓ During the Logan Laboratory monthly staff meetings, employees will be encouraged to share information about the strategic plan and goals through round-table discussions.
- ✓ The Logan Laboratory Section will implement fun strategic goal interactive contests in multiple formats with rewards.

Water Quality Monitoring Section

- ✓ The Water Quality Monitoring Section will host open strategic plan and goal discussions during the monthly and weekly team meetings.
- ✓ Strategic goals will be tied into the discussions during planning and budget sessions, including how each process may affect the budget or the strategic goal.
- ✓ Water Quality Monitoring Section supervisors will assist employees in identifying how their day-to-day tasks relate to strategic goals.
- ✓ At employee reviews, Water Quality Monitoring Section supervisors will discuss performance measures and how they relate to the Strategic Plan.
- ✓ The Water Quality Monitoring Section will feature monthly accomplishments during meetings and discuss how these accomplishments relate to the strategic plan.

Data Management

- ✓ The SCADA Security Systems team will integrate strategic goal discussions into regular staff meetings.

- ✓ The SCADA team will define goals and include this information in the SCADA project tracking system.
- ✓ Open dialogue will be encouraged to create brainstorming opportunities about projects that align with the plan; staff members will be recognized for their contributions during the discussions.
- ✓ SCADA team members will be encouraged to join strategic plan goal teams.
- ✓ Strategic plan goals and concepts will be reinforced with frequent simple messaging that emphasizes staff members' contributions through their day-to-day activities.

SCADA Security Systems

- ✓ The SCADA Security Systems team will integrate strategic goal discussions into regular staff meetings, one goal per meeting.
- ✓ The SCADA team will define goals and include this information in the SCADA project tracking system.
- ✓ Open dialogue will be encouraged to create brainstorming opportunities about projects that align with the plan; staff members will be recognized for their contributions during the discussions.
- ✓ SCADA team members will be encouraged to join strategic plan goal teams.
- ✓ The SCADA team will engage with staff members by sending out one strategic plan email question each week to apply real-world steps to achieve a goal of the plan, i.e., innovation, data storage, user-friendliness of SCADA, etc.
- ✓ Guests and goal leaders will be invited to participate in SCADA staff meetings for an outside perspective and review strategic goal updates and initiatives.
- ✓ Strategic plan goals and concepts will be reinforced with frequent simple messaging that emphasizes staff members' contributions through their day-to-day activities.
- ✓ The Scada team hosts friendly strategic goal competitions among staff members.

Implementation & Monitoring

In the final step of the annual strategic planning process, the Utilities Director and Utilities Deputy Director will meet with the County Administrator and Deputy County Administrator to discuss progress, seek feedback, and align with Countywide initiatives. After this meeting, the strategic plan is updated and finalized, and the Utilities Deputy Director then holds a kickoff meeting with the ten goal team leaders. Team leaders are tasked with working with their goal action teams and incorporating staff members across County departments into these action teams. Progress is monitored and tracked in the Utilities' work plan. Below are the steps that proceed with the annual review meeting.

- ✓ Present the results of the strategic plan workshops, action items, and plan updates to Pinellas County Utilities' staff at a live virtual presentation.

- ✓ Continue to provide Department self-assessment and achievement benchmarking of strategic goals.
- ✓ Compile and distribute anonymous survey results to the department.
- ✓ Hold regularly scheduled monthly update meetings with goal team leaders to discuss progress and updates.
- ✓ Provide a quarterly update report to the Utility Department Director.
- ✓ Meet with County Administration, including the County Administrator, on an annual basis to review and discuss updates and any modifications to the Utilities strategic plan.

Goal Team Leader Tasks:

- ✓ Work with mid-managers to educate staff members on how they fit into strategic goals and plans.
- ✓ Map out strategic plan goals annually and measure progress.
- ✓ Host regular goal team meetings, if appropriate, and allow staff to attend.
- ✓ Maintain work plan information to gather detailed information into a master schedule.
- ✓ Review master timeline to identify areas of overlap; adjust as necessary to ensure resources are focusing on the priorities.
- ✓ Seek Division Director approval for any changes to objectives or tactics.
- ✓ Deliver department-wide presentations on goal team updates on progress and initiatives.

Appendix A: Goals, Strategies, and Objectives

Category	Task Name	Start	Finish	Percent Complete
Goal 1	Product Quality	12/15/2019	12/1/2027	62.00%
Strategy	1. Compliant with local, state, and federal requirements	5/1/2020	12/31/2022	0%
Objective	Meet House Bill 53 requirements with Wastewater System survey	1/1/2022	6/30/2022	0%
Objective	Adhere to Clean Waterways Act Requirements	12/17/2021	12/31/2023	0%
Tactic	Meet rule requirements for the FDEP asset management rule	12/17/2021	12/31/2023	0%
Tactic	Meet PFAS requirements	12/17/2021	1/1/2025	0%
Strategy	2. Provide drinking water that surpasses requirements and protects public health	1/1/2020	12/1/2027	100%
Objective	Partner with TBW to evaluate water quality standards in Exhibit D to provide more consistent delivery of higher quality water to customers	1/1/2020	12/1/2027	100%
Strategy	3. Mitigate public exposure to lead and copper in drinking water.	12/15/2019	10/16/2024	27%
Objective	Develop a plan and budget to implement new Lead and Copper Rule changes	8/1/2021	9/30/2022	100%
Objective	Complete and maintain a Lead Service Line inventory and create SOP for the discovery of lead; Develop an LSL replacement program	6/1/2021	10/16/2024	20%
Objective	Strengthen treatment requirements - evaluate corrosion control options	1/1/2020	6/30/2022	20%
Objective	c	12/15/2019	10/16/2024	0%
Objective	Develop a method to ensure compliance for lead and copper testing in schools and childcare facilities	6/1/2021	10/16/2024	20%
Strategy	4. Reduce, mitigate, or eliminate SSOs.	1/1/2020	1/21/2025	83.3%
Objective	Maintain CMOM Program	4/30/2020	12/31/2027	100%
Objective	Implement the SSO Task Force's short and long term recommended solutions	1/1/2021	3/31/2025	50%
Objective	Develop and Implement a Program and WQ/GMD SOP to address I&I (Roof drains and other illicit connections connected to Sewer systems found during smoke testing)	1/1/2022	12/31/2022	100%
Strategy	5. Advocate for attainable water quality and environmental legislation based on sound science, protecting public health and the environment.	12/31/2020	12/31/2025	100%
Objective	Active engagement in major water sector associations to influence legislation and regulation (FWEAUC, FDEP, FSAWWAUC, Water Reuse, County Legislative lobbyist)	5/31/2021	12/31/2021	100%
Objective	Identify and support innovative research initiatives that further advancement in public health protection. (Prepare annual research priorities and present them to the leadership team. Implement ideas for research and development in coordination with Engineering)	12/31/2020	12/31/2025	100%

Category	Task Name	Start	Finish	Percent Complete
Goal 2	Operational Optimization	8/1/2020	7/21/2022	0%
Strategy	1. Determine and assess current performance measures.	8/1/2020	6/30/2023	100%
Objective	Align Division specific performance measures with effective Utility Management handbook goals	8/1/2020	7/1/21	100%
Strategy	2. Work with REM to assess future spacing needs (14 S. Fort Harrison) as part of countywide space evaluation (STANTEC).	1/1/2021	12/31/2022	0%
Strategy	3. Develop a plan for the cost of operational service with Raftelis	8/1/2020	6/1/2022	85%
Objective	Work with a consultant to perform a business process analysis to determine the cost of operational services.	6/22/2020	12/21/2022	85%

Category	Task Name	Start	Finish	Percent Complete
Goal 3	Financial Viability	5/1/2020	9/30/2023	74.0%
Strategy	1. Analyze and implement user fees every four years to ensure appropriate cost allocation and regional benchmarking. (External)	5/1/2020	9/30/2023	85%
Objective	Finalize all user fee recommendations and public outreach plans and present to BCC (Stantec evaluation for user fees and MGT evaluation for septage and FOG user fees)	2/1/2021	10/1/2022	75%
Objective	Develop reclaim water meter user fees as part of the AMI project implementation (BCC Approval based on contractor charges)	1/31/2022	6/30/2022	50%
Objective	Review user fees every four years to adjust for market fluctuations.	5/1/2020	9/30/2023	85%
Strategy	2. Analyze and implement water, sewer, and reclaimed rates every four years to ensure revenue sufficiency.	5/1/2020	4/30/2023	53%
Objective	PCU is contracted with a consultant to perform the analysis to determine PCU FY24-27 rates.	6/12/2020	3/9/2021	100%
Objective	Finalize all water, sewer, and reclaimed recommendations and public outreach plans and present to BCC (Stantec evaluation for water, sewer, and reclaimed rates for FY24-27).	6/1/2022	4/1/2023	0%
Objective	Work with OMB to annually evaluate water fund borrowing needs to fund sewer system improvements.	11/1/2021	4/30/2022	60%
Strategy	3. Ensure financial transparency with all stakeholders.	10/1/2020	2/28/2022	28%
Objective	Establish a finance position to manage department finances.	12/17/2021	4/30/2022	50%
Objective	Advertise and obtain consultants for ongoing financial services.	12/17/2021	7/31/2022	25%
Strategy	4. Seek supplemental funding.	10/1/2020	9/30/2021	0%
Objective	Advertise and obtain program management services to manage ARPA and seek infrastructure bill funding.	12/17/2021	7/31/2022	
Strategy	5. Establish rate and billing practices that provide enhanced affordability.	1/1/2022	12/1/2026	0%
Objective	Evaluate tiered rate structure in the FY24 rate study	1/1/2022	10/1/2023	0%
Objective	Implement a monthly budget billing process (flat-rate billing to be adjusted annually)	10/1/2026	12/31/2026	0%

Category	Task Name	Start	Finish	Percent Complete
Goal 4	Infrastructure Strategy and Performance	1/1/2019	1/1/2030	66.9%
Strategy	1. Obtain ISO 55000 certification for PCU	1/1/2023	12/31/2025	38%
Objective	Finalize (ISO 55000) asset management plans for all asset classes.	6/1/2020	7/31/2023	50%
Objective	Ensure four (4) team members complete the IAM certification process	6/1/2021	8/31/2022	25%
Strategy	2. Develop long-range plans to meet Public service demands and maintain infrastructure reliability and sustainability.	1/1/2020	1/1/2030	9.4%
Objective	Program Projects in budget(s) for Water Master Plan	10/1/2021	2/1/2022	0%
Objective	Program Projects in budget(s) for Wastewater Collection Master Plan	10/1/2024	2/1/2025	0%
Objective	Present Wastewater Collection Program Management Project, Private sewer lateral Policy alternatives, and North and South County RCW Master Plan implementation status	1/29/2021	5/6/2021	100%
Objective	Pursue adoption of private lateral policies through a public hearing process.	12/17/2021	2/28/2022	0%
<i>Tactic</i>	<i>Develop and complete implementation plan</i>	<i>12/17/2021</i>	<i>9/30/2022</i>	<i>5%</i>
Objective	Program Projects in budget(s) for North and South Co. RCW Master Plan	2/1/2021	3/1/2021	0%
Objective	Program Projects in budget(s) for SCB MP	10/1/2021	2/1/2022	50%
Objective	Program Projects in budget(s) for Dunn Master Plan	10/1/2020	3/1/2021	50%
Objective	Establish a criticality matrix for all assets	1/27/2021	7/31/2023	0%
Objective	Integrate cost of ownership lifecycle data into water and wastewater master plans	1/24/2020	7/5/2023	75%
Strategy	3. Develop a GIS plan for data collection and condition assessment plan for assets.	1/1/2020	1/21/2025	43.0%
Objective	Integrate condition assessment data into GIS	1/18/2021	8/1/2022	5%
Objective	Integrate, install, and estimate lifecycle dates of all assets into ESRI/GIS	11/23/2020	1/15/2021	10%

Objective	Migrate cost of ownership lifecycle date into ESRI/GIS	1/1/2020	1/1/2025	100%
Objective	Program ESRI/GIS with all criticality values	8/2/2022	12/1/2022	0%
Objective	Ensure map correction and onboarding decommissioning process is implemented	12/1/2019	5/1/2020	100%
Strategy	4. Ensure 85% of all CIP projects are on schedule.	10/1/2020	4/8/2026	100%
Objective	Evaluate alternative project delivery methods	12/17/2021	9/30/2022	15%
Objective	PMIS complete phase 2 with master plan dashboards	12/17/2021	9/30/2022	15%
Strategy	5. Continue to improve water infrastructure to maintain and improve product quality and comply with regulatory obligations.	4/30/2020	12/31/2027	33.30%
Objective	Septic to sewer program development and implementation	4/30/2020	1/15/2023	15.00%
Objective	Screen all CIP projects through an I&I planning tool	11/5/2021	1/5/2022	0%
Objective	Provide leadership and coordination for Wastewater/Stormwater partnership	1/1/2020	1/21/2025	100%
Objective	Finalize and gain BCC approval for the vehicle "and equipment" interlocal agreement	1/1/2020	9/30/2022	0%
Objective	Hire a consultant to evaluate interconnects with the City of St. Pete - joint project agreement	11/1/2021	6/1/2022	0%

Category	Task Name	Start	Finish	Percent Complete
Goal 5	Employee & Leadership Development	10/1/2019	12/31/2025	41.6%
Strategy	1. Develop a recruitment plan for Utilities department.	3/24/2020	12/31/2025	100.0%
Objective	Utilize a variety of recruiting strategies and techniques that target specific employment markets to improve the County's ability to attract and hire quality candidates	3/24/2020	12/31/2025	100%
Objective	Engage in active recruitment strategies for difficult to fill positions	3/24/2020	12/31/2025	100%
<i>Tactic</i>	<i>Lealman Career Fair</i>	<i>12/17/2021</i>	<i>3/31/2022</i>	<i>100%</i>
Strategy	2. Enhance employee development and advancement opportunities.	3/24/2020	12/31/2025	75%
Objective	Continue the DLIU Leadership Development Program (Start New Explorer - Summer '21, Coach kickoff for Fearless and Navigator Spring' 21)	2/1/2019	12/31/2025	100%
Objective	Implement Career Paths (Classified implementation March 2021, Exempt in April 2022)	10/1/2020	4/30/2022	50%
Strategy	3. Develop a succession management plan for key leadership positions (supervisory level or above, 5-year retirement eligibility).	9/1/2021	10/31/2022	5%
Strategy	4. Develop individual performance measures and goals.	1/1/2021	12/31/2025	67.5%
Objective	Enhance supervisors' abilities to evaluate and communicate performance expectations	1/1/2021	9/30/2022	35%
Objective	Continue department-wide recognition program (Finalize Program purchases and rollout, establish measures for the Program and finalize policy)	1/1/2021	3/1/2021	100%
Strategy	5. Support a culture of innovation and employee feedback.	10/1/2019	12/31/2025	37.5%
Objective	Obtain internal and external recognition for operating excellence and innovation. Encourage all staff to contribute and implement	10/1/2019	12/31/2025	100%
Objective	Encourage and recognize innovation program idea submissions through the recognition program (Start reviewing and awarding submissions)	1/1/2021	12/31/2025	100%
Objective	Continue employee feedback committee (Complete implementation of specific action items by managers and supervisors)	1/1/2020	12/31/2025	100%
Objective	Plan to address Employee Voice Survey	2/15/2022	12/31/2022	0%
<i>Tactic</i>	<i>Develop a plan to increase supervisor engagement with frontline staff</i>	<i>2/15/2022</i>	<i>12/31/2022</i>	<i>0%</i>
Objective	Develop a system to ensure interview panel diversity	1/1/2022	12/31/2022	0%
Objective	Ensure job posting qualifications less constricted	12/17/2021	12/31/2023	0%
Objective	Diversity, Equity, and Inclusion- participate and provide input in countywide diversity committee	1/1/2022	12/31/2022	0%

Category	Task Name	Start	Finish	Percent Complete
Goal 6	Customer Satisfaction	3/24/2020	2/1/2022	38%
Strategy	1. Develop a Department-wide communication plan with internal department communications and external customer outreach.	3/24/2020	12/31/2024	98%
Objective	Identify different communication methods	3/24/2020	1/1/2021	100%
Objective	Encourage communication and camaraderie	3/24/2020	1/1/2021	100%
Objective	Assist OTI in the Countywide website development	8/1/2020	12/31/2024	95%
Objective	Obtain public relations & communication consultant services	12/17/2021	7/31/2022	95%
Strategy	2. Enhance customer satisfaction.	3/24/2020	9/30/2022	36%
Objective	Implement customer service training for operational managers (Take ownership of cross-departmental customer complaints)	7/1/2021	8/31/2022	0%
Objective	Improve and streamline internal & external customer notification	12/1/2020	6/30/2022	80%
Objective	Develop and implement the water/sewer/reclaimed policy	10/1/2019	9/30/2022	98%

Category	Task Name	Start	Finish	Percent Complete
Goal 7	Stakeholder Understanding & Support	3/24/2020	12/1/2025	28%
Strategy	1. Strengthen existing stakeholder partnerships annually.	3/24/2020	7/1/2022	50%
Objective	Meet with PCU stakeholders to identify partnership opportunities (TBW, SWFWMD, TBEP, GEC Consultants) annually	3/24/2020	7/1/2022	60%
Objective	Establish a Regional Utilities Leadership Luncheons Semi-annual networking events (Utilities Directors and Division Directors for Lunch - PINELLAS, PASCO, HILLSBOROUGH, ST. PETE, TAMPA, NEW PORT RICHEY)	2/1/2021	5/1/2022	90%
Objective	Establish Annual WW/SW Partnership Steering Committee Progress Video	1/1/2022	7/1/2022	0%
Strategy	2. Form new partnerships to improve public outcomes for Pinellas County.	3/24/2020	12/31/2025	25%
Objective	Identify new stakeholder groups that align with current PCU strategic initiatives.	1/29/2021	12/31/2022	40%
Objective	Develop a comprehensive list for stakeholder groups	12/3/2021	7/1/2022	0%

Category	Task Name	Start	Finish	Percent Complete
Goal 8	Enterprise Resiliency	3/24/2020	9/30/2022	42%
Strategy	1. Maintain and Update Emergency Management Plan.	3/24/2020	9/30/2025	58%
Objective	Update Emergency Response Plan	3/24/2020	9/30/2022	100%
<i>Tactic</i>	<i>Complete Emergency Response Plan Document</i>	<i>3/24/2020</i>	<i>9/30/2022</i>	<i>100%</i>
Objective	Identify staffing levels needs during all operating events	3/24/2020	9/30/2022	100%
<i>Tactic</i>	<i>Hurricane staffing needs</i>	<i>3/24/2020</i>	<i>9/30/2022</i>	<i>100%</i>
<i>Tactic</i>	<i>Other UOC activation staffing needs</i>	<i>3/24/2020</i>	<i>9/30/2022</i>	<i>100%</i>
<i>Tactic</i>	<i>Normal operating staffing needs</i>	<i>3/24/2020</i>	<i>9/30/2022</i>	<i>100%</i>
Objective	Ensure critical equipment readiness through utilization of Cityworks reports.	2/1/2022	9/30/2022	20%
<i>Tactic</i>	<i>Develop an overall generator testing plan</i>	<i>1/1/2022</i>	<i>1/1/2023</i>	<i>50%</i>
<i>Tactic</i>	<i>Implement generator testing plan</i>	<i>1/1/2022</i>	<i>1/1/2023</i>	<i>0%</i>
<i>Tactic</i>	<i>Complete Risk and Resiliency Assessment for Keller to include equipment</i>	<i>1/1/2019</i>	<i>1/1/2020</i>	<i>100%</i>

Tactic	Complete Risk and Resiliency Assessment for Dunn and South Cross to include equipment	1/1/2021	9/30/2022	90%
Objective	Identify and correct physical and cybersecurity gaps on a biannual basis	3/24/2020	9/30/2022	50%
Tactic	Create a process to identify physical and cybersecurity gaps bi-annually	3/24/2020	9/30/2022	25%
Tactic	Implement process to identify physical and cybersecurity gaps bi-annually	3/24/2020	9/30/2022	0%
Tactic	Conduct a cybersecurity training exercise	3/24/2020	11/1/2021	100%
Tactic	Complete Risk and Resiliency Assessment for Keller to include physical and cybersecurity threat analysis	1/1/2019	1/1/2020	100%
Tactic	Complete Risk and Resiliency Assessment for Keller to include physical and cybersecurity threat analysis	1/1/2021	9/30/2022	25%
Objective	Participating as a stakeholder in countywide camera and access control upgrades	1/1/2021	12/31/2022	20%
Tactic	Establish PCU liaison for the county camera and access control upgrade meetings	1/1/2021	1/1/2021	100%
Tactic	Implement based on countywide plan	1/1/2021	1/1/2023	25%
Objective	Update Crisis Communications Plan (add Precautionary Boil Water Notice (PBWN))	6/1/2020	11/30/2022	80%
Tactic	Establish Incident Tiers and create Incident Communications SOP	6/1/2020	3/31/2021	100%
Tactic	Have leadership review and provide feedback	6/1/2020	3/31/2021	100%
Tactic	Updated Incident Communications SOP based on feedback and implement	6/1/2020	12/31/2022	75%
Strategy	2. Grow interagency partnerships.	3/24/2020	5/1/2022	0%
Objective	Engage municipal partners in an emergency planning workshop	3/24/2020	12/31/2022	
Tactic	Tampa Bay Water Regional Workshop	1/1/2021	12/31/2022	0%
Tactic	Host workshop with municipalities in our system/service area	1/3/2022	5/1/2022	0%
Strategy	3. Develop and adopt innovative sciences and technologies into PCU processes	3/24/2020	12/31/2025	20%
Objective	Identify the current technology being used and is it working	3/24/2020	12/31/2025	0%
Tactic	The innovation committee will provide annual updates on technological advances that could be used within our processes	3/24/2020	12/31/2025	0%
Objective	Use technology to bolster resilient operating systems	3/24/2020	12/31/2025	0%
Objective	CIP projects over \$1 million will be evaluated using a sea-level rise planning tool	3/24/2020	1/7/2022	100%
Strategy	4. Annually review and incorporate goals and strategies of the sustainability and resiliency leadership committee and action team (LCAT).	3/24/2020	12/31/2025	100%
Objective	Participate actively in the SRAP (Sustainability Resiliency Action Plan)	2/1/2021	12/16/2021	100%
Strategy	5. Meet the requirements of AWIA every five years.	3/24/2020	12/31/2022	75%
Objective	Update Emergency Response Plan for Water Treatment Facility	3/24/2020	9/29/2020	100%
Tactic	Complete emergency response plan in accordance with AWIA by September 30th, 2020, for Water	3/24/2020	9/29/2020	100%
Tactic	Complete and submit AWIA compliance certification to EPA by March 2020	3/1/2020	3/30/2020	100%
Objective	Update Emergency Response Plan for Wastewater Treatment Facility	10/1/2021	7/31/2022	50%
Tactic	Complete emergency response plan in accordance with AWIA for Wastewater	10/1/2021	7/31/2022	50%
Tactic	Complete and submit AWIA compliance certification to EPA for Wastewater	10/1/2021	7/31/2022	50%
Strategy	6. Enhance Energy Management and Electrical System Resiliency.	1/1/2022	12/31/2025	0%
Objective	Complete an Energy Master Plan in alignment with Ready for 100 resolution (Granicus No. 21-2125A)	1/1/2022	12/31/2025	0%
Objective	Develop an Electrical System Management Program.	1/1/2022	12/31/2025	0%
Objective	Upgrade generators and preventative maintenance program and add to master plan (Finalize Level of Service document or outsource)	1/3/2022	3/31/2022	0%
Objective	Develop Post Storm Assessments (generators, breakers, transformers, etc.)	1/1/2021	5/1/2022	0%
Objective	Develop a strategy for the FOG facility's future use and ownership	1/1/2022	12/31/2023	0%

Category	Task Name	Start	Finish	Percent Complete
Goal 9	Community Sustainability	8/1/2020	12/1/2028	38%
Strategy	1. Enhance resource recovery and reduce or eliminate adverse environmental impacts from biosolids.	7/1/2021	12/1/2028	0%
Objective	Construct a Regional Resource Recovery Facility by 2028 that eliminates land-applied biosolids from all wastewater facilities in Pinellas County and increases recovery of resources for Solid Waste	7/1/2021	12/1/2028	0%
Strategy	2. Support regional businesses by actively participating in the Small Business Enterprise Program (SBE).	7/1/2021	12/1/2025	50%
Objective	Increase minimum thresholds from 5% to 10% on capital improvement projects where possible	7/1/2021	12/1/2025	100%
Objective	Review SBE consultant list for use on all projects (<=100K)	1/1/2023	1/1/2024	100%
Objective	Implement minimum requirements for operating contracts through the SBE program	10/1/2021	9/30/2022	50%
Objective	Ensure full utilization of any SBE sub-consultants on any CCNA projects	1/3/2022	12/31/2025	0%
<i>Tactic</i>	<i>Develop process to implement SBE into project negotiations</i>	<i>1/3/2022</i>	<i>12/31/2025</i>	<i>0%</i>
Strategy	3. Develop enhanced recruitment initiatives that support community growth and vitality.	8/1/2020	12/1/2022	0%
Objective	Develop a jail to job pipeline program that bolsters rehabilitation programs in the prison and jail systems and connects exiting inmates for hard to fill job opportunities in the Utilities department for trainee underfill	8/1/2020	6/30/2021	100%
<i>Tactic</i>	<i>Contact Florida Youth Ranches and discuss J2J future options</i>	<i>1/3/2022</i>	<i>5/31/2022</i>	<i>5%</i>
Objective	Participate and host local job fairs	3/1/2021	12/31/2022	100%
<i>Tactic</i>	<i>Hold a recruitment event for hard-to-fill positions (Chris Moore - Lealman)</i>	<i>1/3/2021</i>	<i>6/30/2022</i>	<i>100%</i>
Objective	Develop a Vet 2 Jobs Program (Henry Greenberg)	12/6/2021	9/30/2022	60%
Objective	Engage with local and alternative education institutions (PTEC Public Works Academy, Pinellas County Schools, SPC Workforce Academy)	1/3/2022	9/30/2022	10%

Category	Task Name	Start	Finish	Percent Complete
Goal 10	Water Resource Sustainability	3/24/2020	1/1/2027	31.5%
Strategy	1. Support alternative water resources to enhance the sustainability of the water supply for the region.	3/24/2020	3/1/2025	61.1%
Objective	Develop PCU position on alternate water sources	3/24/2020	2/24/2021	100%
Objective	Work with TBW on methods to implement alternative water projects	3/24/2020	11/1/2024	58.0%
<i>Tactic</i>	<i>Provide feedback and comments on the 2022 TBW Water Master Plan</i>	<i>1/1/2019</i>	<i>7/1/2022</i>	<i>66.0%</i>
<i>Tactic</i>	<i>Evaluate potential AWS opportunities from SCB effluent discharge</i>	<i>11/1/2021</i>	<i>11/1/2024</i>	<i>50.0%</i>
Objective	Implement selected recommendations for the North County ASR/MAR Feasibility Study (Chestnut). Proceed with permitting and evaluate Surface Water augmentations using Tarpon Lake Water	3/24/2020	3/1/2025	50%
Strategy	2. Determine methods for reduction of water loss.	3/24/2020	12/1/2022	0%
Objective	Establish and implement a water loss reduction program to include leak detection and reducing non-revenue water (Will be modified as technologies become available)	3/24/2020	12/1/2022	0%
<i>Tactic</i>	<i>Evaluate Utilis satellite leak detection value</i>	<i>11/30/2021</i>	<i>12/31/2022</i>	<i>20%</i>
Strategy	3. Implement system-wide Advanced Metering Infrastructure (AMI).	3/24/2020	1/1/2026	33.4%
Objective	Develop a data management strategy and budget to get the maximum benefit from the AMI platform	10/1/2022	10/1/2023	0%
Objective	Complete the AMI Communications Plan to include communication on reclaimed water consumption rates and meter fees (Consultant Contractor) HDR Consultant Contractor	7/1/2021	12/31/2022	0%
Objective	Complete AMI meter installations	3/24/2020	1/1/2026	66.7%
Objective	Convert all wholesale meters to electronic registers	3/24/2020	1/1/2026	0%
Objective	Customer outreach --> HDR Consultant Contractor	3/1/2022	1/1/2026	0%

Strategy	4. Ensure the PCU reuse and surface water discharge strategies meet Senate Bill 64 standards. (SCB w/ Nory)	6/1/2021	11/1/2024	0%
Objective	Partner with consultant to evaluate options	7/1/2021	11/1/2021	100%
Objective	Present recommendations with BCC at April work session	1/3/2022	4/7/2022	25%
Objective	Meet timelines and implement consultant milestone recommendations	11/1/2021	11/1/2024	20%



Guidelines for PowerPoint Presentations for the Board of County Commissioners Meetings

For Pinellas County Staff, updated 11/20/2019

PowerPoint template

Build your presentation using [the template on the Marketing and Communications SharePoint site](#). The file is called "BCC_Template" followed by a version number. As improvements are made, the template is updated, so start with this template rather than one you may have from a previous presentation.

Deadline

Presentations are due at noon **three weeks** before the meeting.

How to submit your presentation

Upload your presentation to the agenda in Legistar. Legistar documentation is available at <http://www.pinellascounty.org/granicus/>.

- Email your presentation in PowerPoint format (.pptx) to Agenda Coordinator Jo Lugo at jlugo@pinellascounty.org.
- In your email, specify:
 - Number of slides and approximate length of time the presentation will take.
 - Name and title of individual who will be making the presentation.
 - Legistar file number that the presentation is also attached to.
- If the file is too large to email, contact the Agenda Coordinator to transfer the file by dropbox or another method.
- The Agenda Coordinator will arrange for the file to be loaded on the Assembly Room computer ready for use during the meeting.

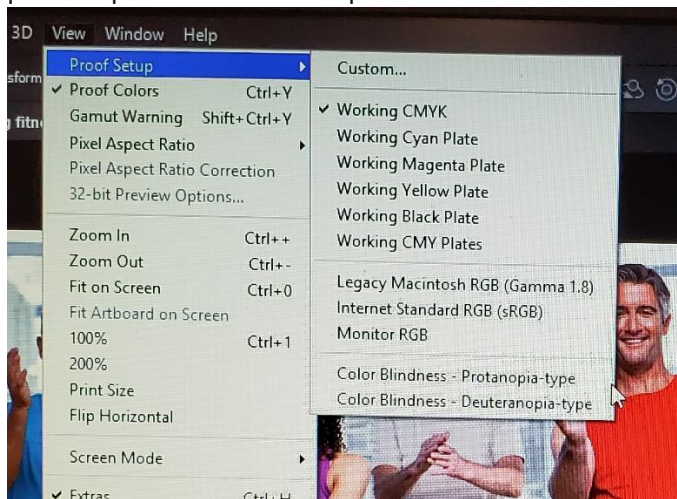
Guidelines for building your presentation

1. Read the instructions in the PowerPoint template.
2. Remember that your presentation will be broadcast on the County's cable channel, which is NOT high definition. **Small text and graphics will not be legible.**
3. Your PowerPoint presentation should **supplement** what you say. Provide pictures, graphs, tables, or other information that helps communicate your message.
4. Limit the amount of text on individual slides. If necessary, continue long areas of text onto a second slide and note "(continued)".
5. Keep graphics, including charts and tables, simple and strong. Thin lines, weak colors, or added patterns do not work well.
6. Do not add any special effects, animations, transitions, or sounds to your presentation.

Pinellas County Social Media ADA Compliance Guide

Color and Contrast- Minimum

- **Logotypes:** Text that is part of a logo or brand name has no contrast requirement.
- Text should be 14 point (typically 18.66px) or larger and bold, or 18 point (typically 24px) or larger.
- Natural text (e.g.: a photo of a sign) in a photo do not have any contrast requirements.
- Some users have difficulty perceiving color. People with partial sight often experience limited color vision, and many older users do not see color well.
- Colors to keep in mind are Red-green color blindness and blue-yellow color blindness. These are the more common colors that are not seen well. These colors can be used as normal but factor in the possibility the other colors used around it.
- If using Adobe Photoshop, under the VIEW option. Click PROOF SET Up. Then there are 2 color blindness options that will allow you to view the graphics for people with protanopia and deuteranopia.



- Here is a source to check text and color contrasts.

<https://webaim.org/resources/contrastchecker/>

Other factors to consider when text is involved in the graphic:

- Line height (line spacing) to at least 1.5 times the font size;
- Spacing following paragraphs to at least 2 times the font size;
- Letter spacing (tracking) to at least 0.12 times the font size;
- Word spacing to at least 0.16 times the font size.
- *Note: the default settings on most design programs meet these requirements.*

Posting videos

Seizure risk

- For about 3% of people with epilepsy, exposure to flashing lights at certain intensities or to certain visual patterns can trigger seizures. This condition is known as photosensitive epilepsy. Avoid including the following in your videos:
 - Natural light, such as sunlight, especially when shimmering off water, flickering through trees or through the slats of Venetian blinds.
 - Certain visual patterns, especially stripes of contrasting colors.
 - Flashing lights on buses or emergency vehicles
 - There are no more than three general flashes and no more than three red flashes within any one-second period

Audio

- For prerecorded audio-only content, the audio sounds must be at least 20 decibels higher than the background content. The exception of occasional sounds that last for only one or two seconds. Examples to measure decibels:

Car wash at 20 ft (89 dB)

Propeller plane flyover at 1000 ft (88 dB)

Food blender (88 dB)

Garbage disposal (80 dB).

Conversation in restaurant, office, background music, Air conditioning unit at 100 feet (60dB)

Bird Calls (44dB)

Quiet rural area (30dB)

Breathing (barely audible) (10dB)

How to add captioning to videos:

Closed Captions

You can caption your own videos using one of several free online tools, including:

- [Amara.org](https://www.amara.org)
- [DotSub.com](https://dotsub.com)
- [Subtitle Horse](https://www.subtitlehorse.com)

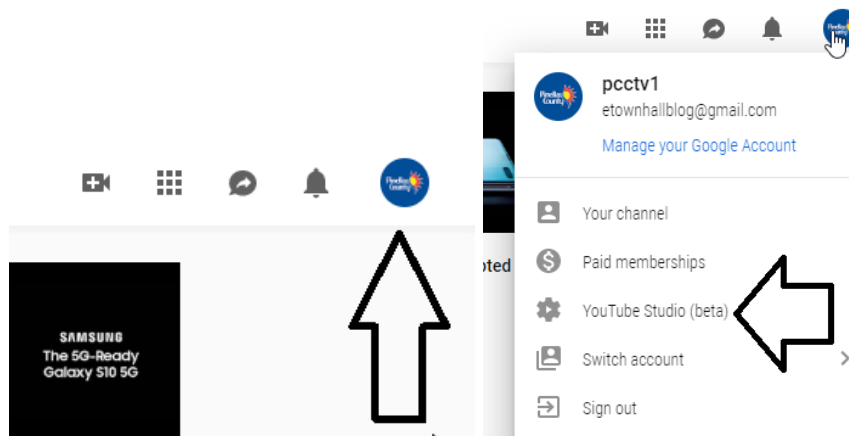
The process for creating captions using each tool is approximately the same:

1. Upload the video to the web (most services can caption any video as long as it has a public URL, including videos on YouTube). To keep the video private during the captioning process, don't publish its URL (YouTube offers this as one of its privacy options).
2. Provide the video's URL to the captioning service. Some services also allow you to upload directly to their site.
3. Use the service's captioning tool to watch the video and transcribe it. Caption text is displayed in real time on the video as you type.
4. Review and edit the captions to be sure they're accurate and easy to follow. The Described and Captioned Media Program (DCMP) provides a [Captioning Key](#) with guidelines for effective captioning.
5. Download the captions as a caption file in the appropriate format.

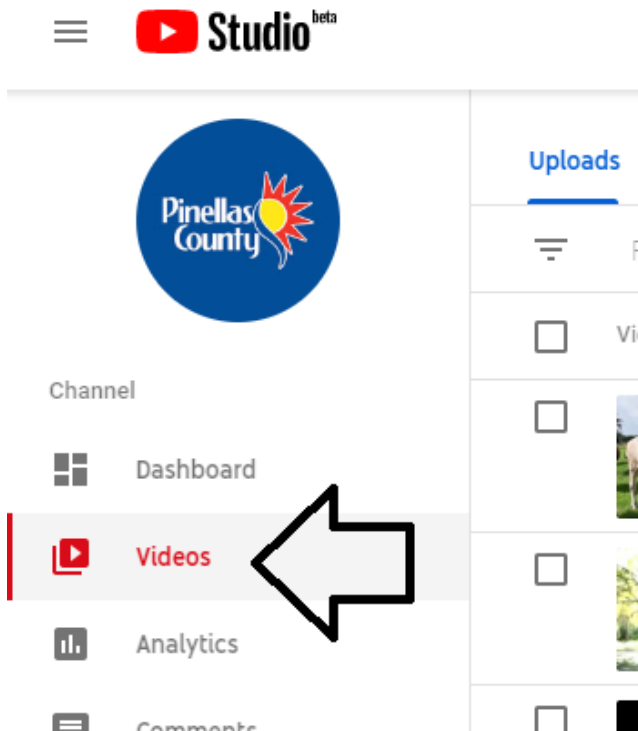
The end product generated by this process is a caption file. Most caption files are plain text files with time codes indicating start and stop times for each caption. However, there are various types of caption files with slight variations in their syntax. The type of file you need depends on how your video is ultimately being provided. See the following section for links to pages that include this information.

YouTube captions: create/export

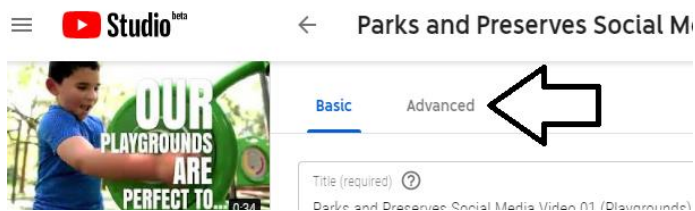
- Upload the video to YouTube. *Note: you should upload it as an unlisted or private video to begin with.*
- Hover over account icon on top right of the screen and click. Then scroll to "YouTube Studio".



- On the left side of the page, click on Videos.



- Click on the video you want to caption, then click on the Advanced tab.



- Once the video is uploaded, YouTube will caption it.

Original video language, subtitles, and CC

Video language
English

To manage other languages, go to [transcriptions](#)

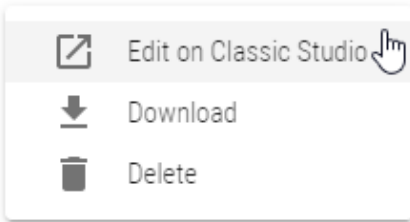
Subtitles and CC for original video language [?](#)

English by YouTube (automatic) [⋮](#)

[UPLOAD SUBTITLES/CC](#)

- To modify or check the accuracy of the transcript, click on the "English by YouTube" followed by Edit on classic studio.

Subtitles and CC for original video language ?



Comments and ratings

- Check and edit the transcript as needed

View published subtitles and CC: English (Automatic)
Subtitles/CC source: Automatic

Edit Unpublish

Actions ▾

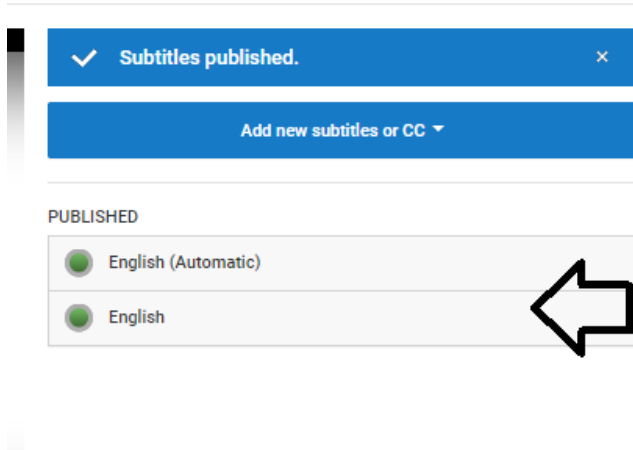
0:05.8 0:10.0	hi my name is Monica Drake I'm the operations manager here at Heritage
0:10.0 0:14.3	Village and we are here for the final night of the Pinellas citizen University
0:14.3 0:18.7	our mission is to collect preserve and interpret the history of Pinellas County
0:18.7 0:26.9	they got to tour portions of the 21 a cur Living History Museum and park on
0:26.9 0:33.6	property we have 22 plus historic buildings including the McMullen log
0:33.6 0:40.6	cabin from 1852 built by Captain James Paramore McMullen up in Clearwater so
0:40.6 0:46.3	one of the oldest extant buildings in Pinellas County as well as the house of

Actions ▾

Type subtitle here then press Enter

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0:26.9 0:33.6	property we have 22 plus historic buildings including the McMullen log
0:33.6 0:40.6	cabin from 1852 built by Captain James Paramore McMullen up in Clearwater so

- Once completed, click publish edits. At this point, the video has subtitles on YouTube. If you want to download the .srt file to import into a movie editing program or Facebook, keep reading
- Click on the subtitle created or modified.

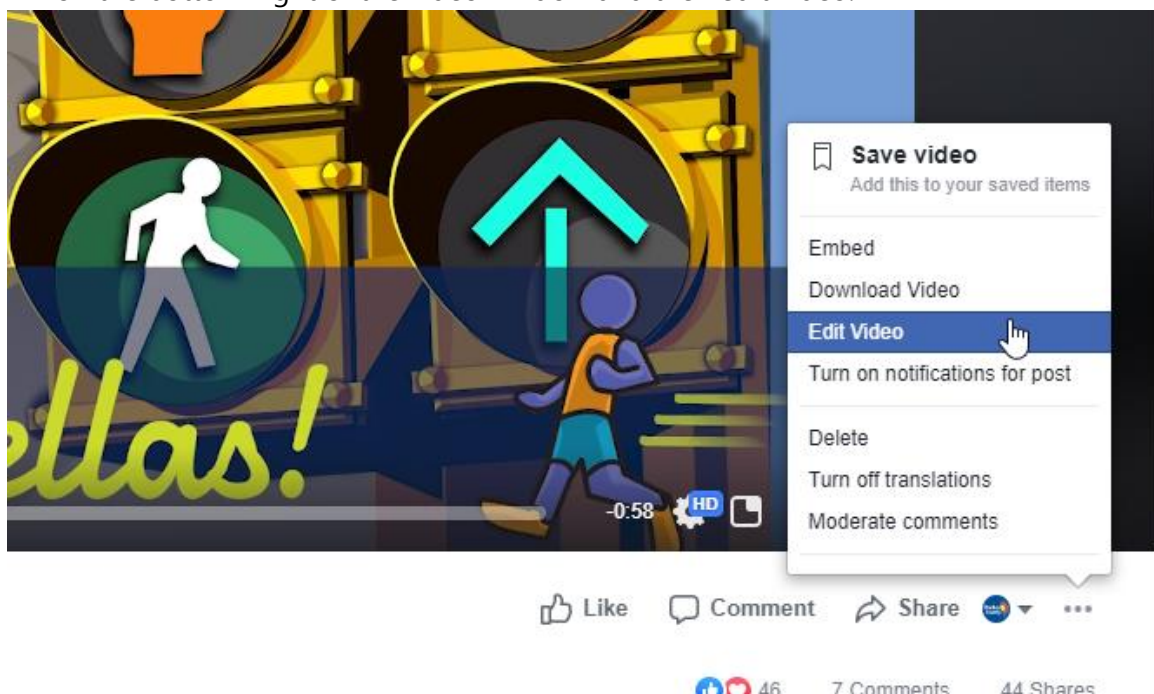


- Click on "Actions" and then click on the file format for the subtitles. Most editing software uses .srt files

Captions for Facebook

If a video has voice, it needs captions. There are two options, **open captions**, where the captions are a part of the actual video, and **closed captions**, where the captions are additional information that can be turned on and off.

- One method is to upload the video to YouTube, which will auto-caption it. You'll still need to check the captions for accuracy and modify as needed.
- Alternately, you can upload the video to Facebook. After you upload, click the three dots on the bottom-right of the video window and then edit video.



- click on "Subtitles & Captions" and then check the "English: Auto Generated" and set your default language to English. If you have a generated .srt file, it can also be uploaded here.

Move Over Law

Video Language
Choose the main language spoken in the video.

Aa Select Language ▾

Add More Captions
You can add additional captions to your video in another language.

Write Upload

Captions Added
Captions that are set to publish will appear on your video once the post is saved.

English: Auto-Generated

Default Language
If the user's preferred caption language isn't available, captions in this language will be used instead.

English (US) ▾

Edit Video

Video Details
Add details to your video and create your video post.

Thumbnail

Distribution
Choose where your video will appear and who can watch or crosspost it.

Subtitles & Captions (CC)
Add subtitles in multiple languages to your video.

Polls
Ask questions during your video to find out what your viewers think.

Tracking
Add labels to help you manage and search for your video.

Pinellas County Government

View Post Published Save

- To check for accuracy, click on the pencil tool next to English: Auto Generated.
- Once checked and edited, save.

Captions

Aa English ▾

Type in or paste your text here...

00:03.740	00:06.640	The move over law States that you must move over
00:06.640	00:07.680	one lane
00:07.680	00:09.900	when passing law enforcement
00:09.900	00:11.580	or emergency vehicles
00:11.580	00:13.980	They are pulled off to the side of the road
00:13.980	00:16.280	

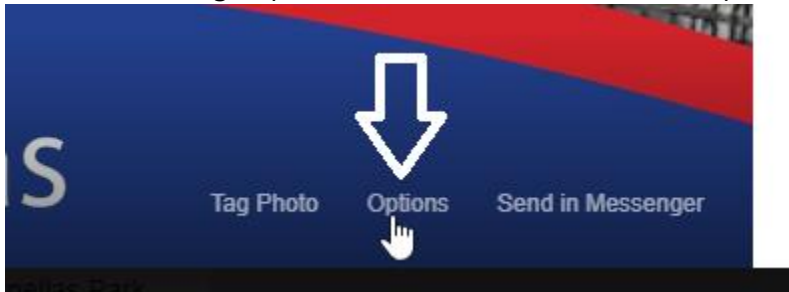
★ Saved

Cancel Save Draft

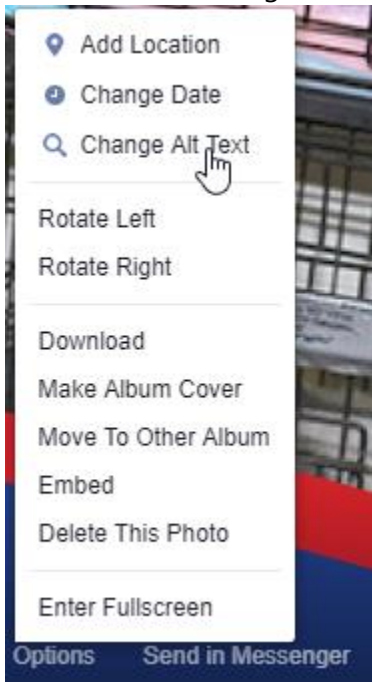
Facebook

Alt Text for graphics

- **Alt text**- Facebook automatically generates a general alternative text but you'll want to make it more specific. You can check it after the photo is posted. Click on the photo. Then click options and selected "change alt text." You will need to check the alt text even if you've added it in your design program.
- How to check or modify **Alt Text**:
Click on the image uploaded to Facebook. Then click "options"



Next, click on "Change Alt Text".

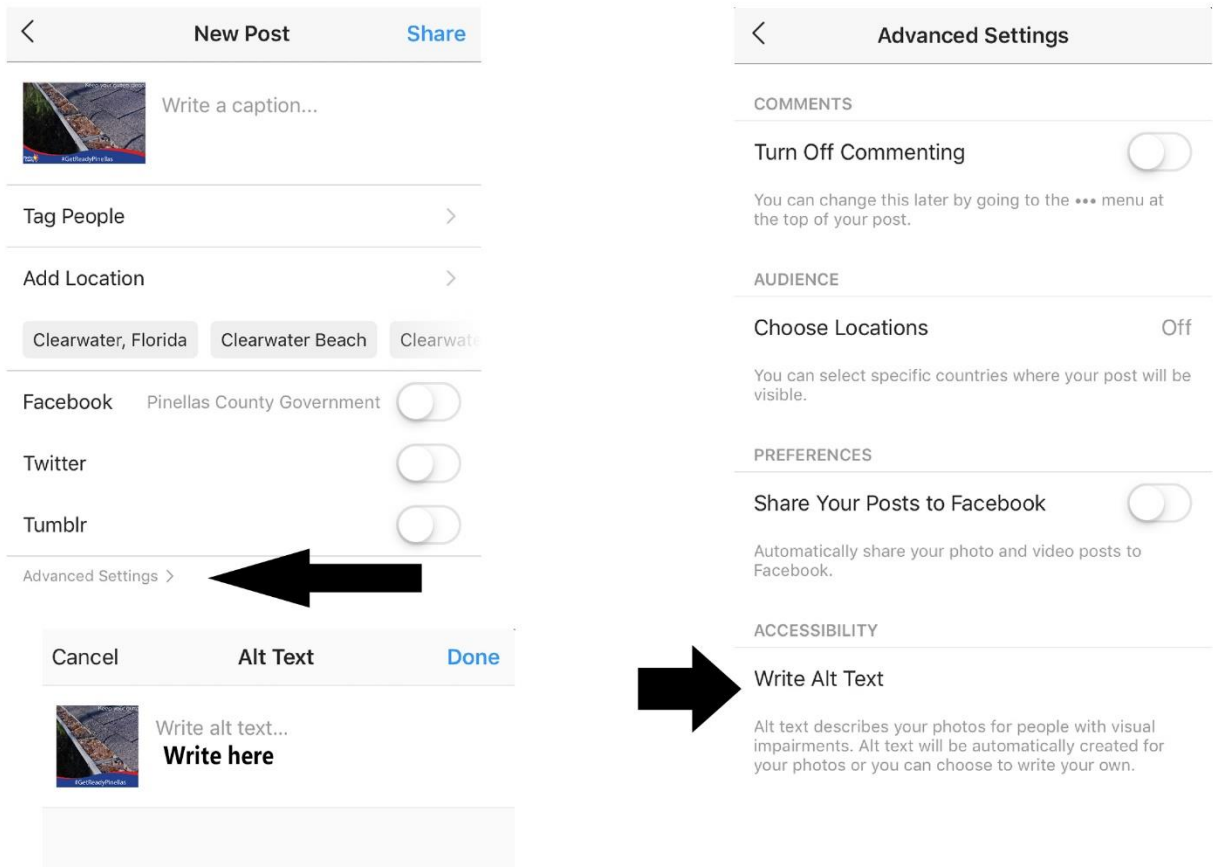


Here is where you enter the description of the photo. The **alt text** should be a general description of what's happening in the photo, as well as any text included in the photo. Example: "Photo of a man and woman running in a park at sunset. Text: Jogging is fun!" Then save the description.

Instagram

Posting photos/graphics-

- **Alt text**- This will be entered manually for each photo. Select the option for “Advanced Settings” on the final page prior to posting. Advanced settings will be located at the bottom of that page where you add your description, tag people, and add location. Once selected, the next screen will give you an option at the bottom to “Write Alt Text”. Add your description of your photo there. Once complete, select done and back once more to the main screen where you started with description.



Livestreaming & Facebook Live-

- Captioning- Can be purchased through a third party or post production. Another option is to include a download of the script.

Sharing posts

- Compliance of partner posts?

Twitter

Posting photos/graphics

- Alt text- If posting directly to Twitter, enter the photo description or text on the photo in the Alt Text field.

How to enable the composition of image descriptions from twitter.com

1. Click on your **profile** icon and select **Settings and privacy** from the dropdown (or press the "g" key quickly, followed by the "s" key).
2. Click [Accessibility](#) from the list of settings.
3. Find the **Compose image descriptions** checkbox.
4. Check the box to turn the setting on or off.
5. Click **Save changes**.

Once active, attach a photo and the "add description" button will be active to allow for a photo description.

Retweets

Are we held responsible and will this reduce what messaging we are allowed to re-tweet.

Social Media Voice

The Pinellas County Marketing and Communications team protects the Pinellas County Brand by ensuring consistency of all public information products. Our social media platforms connect us directly to citizens. Social media engagement is a direct expression of our values and voice. Our goal is to reach our target audience with direct and concise context the matches what the graphic is communicating.

Pinellas County's Brand Attributes

Pinellas County brand identity materials should give the impression through our design, typography, videography, photography, and writing that the county is:

Confident

- not academic, authoritarian or bossy.

Innovative, forward-thinking, contemporary

- not stodgy or out-of-date. Worthy of trusting with the future.

Welcoming

- happy to help, approachable, easy to understand. Appreciative of diversity and partnerships. People-focused. Not confusing or institutional. Meaningful, concise, resident-friendly messaging

Appreciative

- of the great things in our county and of the work we do.

In-touch

- understanding what matters to our many constituencies and able to relate to them.

Professional

- well managed, organized, smart, sensible, trustworthy. Not sloppy, cluttered, or unfocused.

Social Media voice attributes

We will listen and humanize our brand and take part in conversations naturally. We want to demonstrate an open, responsive attitude towards our community that respects our citizens and embodies the values of our mission and brand. As a representative of the Board of County Commissioners, we avoid sharing personal or political opinions or engaging (like) any posts that are perceived as political endorsement. Consider the following when engaging online:

Purpose:

Educate, inform and engage – we aim to foster connection with our followers by actively listening and sharing accurate, relevant information. We want to give our followers opportunities to improve their lives by including a *call to action* whenever possible.

Character:

Professional, friendly and welcoming- we serve our citizens and welcome their questions, concerns, and ideas. Share timely, accurate information. Don't speculate, don't gossip, don't talk trash.

Tone:

Honest, direct, professional and positive. We want citizens to feel like they're talking to a fellow citizen who happens to work for the county, not a faceless bureaucrat.

Language:

Simple and confident with an active voice. Writing in plain English and avoiding acronyms and technical jargon ensures our followers and community understand us.

Dos and Don'ts

Do: Respond appropriately to citizens reaching out to us on social media programs	Don't: insert ourselves in conversations that we are not invited to (or tagged in)
Do: Direct citizens who voice complaints to appropriate feedback channels (public meetings, see-click-fix, etc.)	Don't: advocate for or against existing or proposed policies at any level of government
Do: Share accurate information in response to misinformation posted online	Don't: downplay a citizen's concerns online, even in private messaging.
Do: Stand up against anyone sharing hate speech by responding to, removing, and archiving their offensive posts	Don't: delete negative posts that are not considered hate speech, even if they cast the county in a negative light

Using #Hashtags

Hashtags are used for tracking a conversation. If there is a current hashtag that is used for a topic, we want to check some of the messages prior to using the hashtag because it can drive our followers to that content as well. We also use hashtags for tracking purposes.

Re-posting

Share content that you would be willing to post. Do not share if controversial or would create an issue. Any post we share, we accept the message as our own. We want to create more content than we share. There could be some days where we may share more than we post and this is ok.

Examples of good posts



Why is it good?

This post includes:

- A call to action
- Professional tone
- Simple, active language

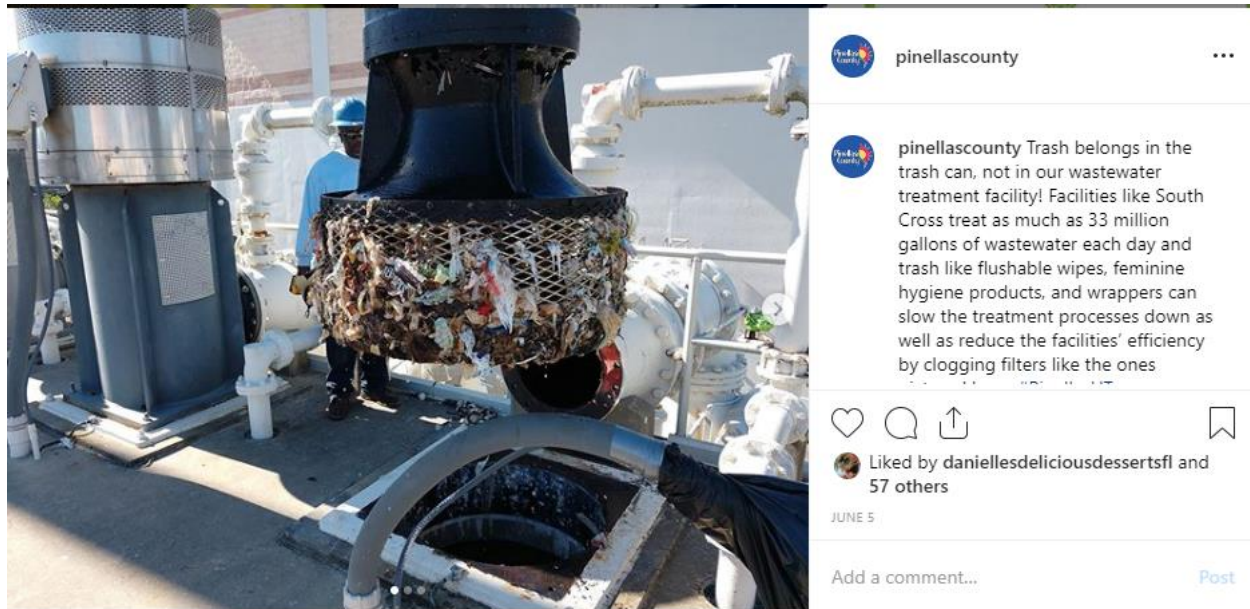


Why is it good?

This example shows an appropriate response to our followers that is:

- Professional and friendly
- Direct and clear information
- Confident tone
- Educational and informative

The below example includes a call to action, professional language, and an effort to humanize our county by showing the reality of employee's daily duties.



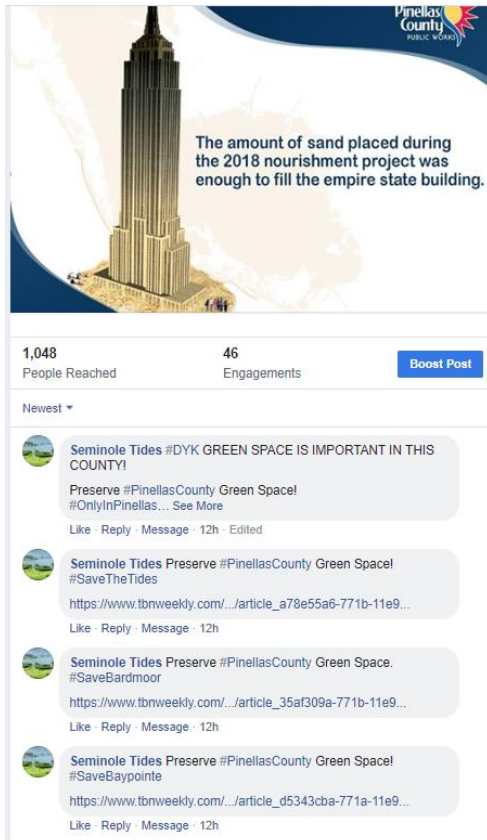
When and how to delete a post:

Spam (irrelevant, repetitive posts), profanity, and hate speech negatively impact our ability to engage followers on social media. As a social media manager, you are authorized to delete posts that violate our guidelines.

To delete a post:

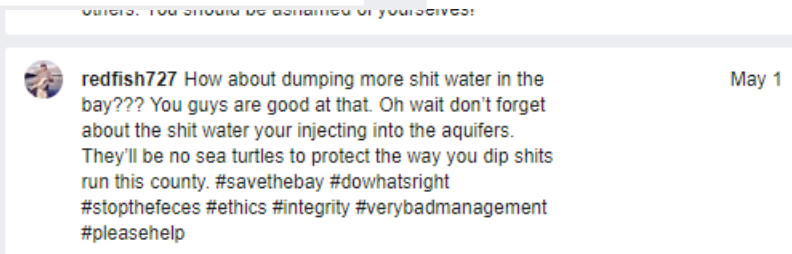
- Create a folder on your department's public drive called "deleted posts." Don't do it on your personal profile because archived posts must be available for public records requests.
- Take a screenshot of the post (as much of the post or all if possible).
- Save the screenshot with the date and platform name (ie. FB-Facebook, IG- Instagram, TW-Twitter, etc.).
- Notify the follower the post is being deleted due to a violation of our guidelines
- Delete the post.

Examples of bad responses



We removed the comments from Seminole Tides because they were spam and irrelevant to the post.

We removed this comment because it contained profanity.



Responding to negative comments:

We do not want to ignore negative comments or comments that attack our County. We want to understand what the follower's complaints are but not accept any blame. We want to try our best to find a resolution for the follower and provide any information that could be helpful.

This update should include a few key components, including:

- The resolution status

- Any laudable customer service measures
- The customer addressed by first name
- Personalized salutation

Example: Hi (First name). Thank you for bringing this issue to our attention. We can understand your frustration and truly appreciate your honest feedback.

Next, identify if there is a department that can assist the follower with their complaint. We want to obtain any additional information from the follower that can be helpful and possibly obtain their communication information. If we continue the conversation externally, make it publicly aware on the post that we are communicating with the resident with a response.

Example: Thank you (first name) for the additional information you provided. Our (department) will be in contact with you.

Nextdoor comments:

For informational posts shared on Nextdoor, comments will be disabled. For posts requesting public input or discussion, comments will be enabled.



BRANDING

Guidelines





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PINELLAS COUNTY BRAND GUIDELINES

The following information and guidelines are intended to help county staff, vendors and contractors in creating materials that support the overall brand identity.

What is a Brand?

Our brand is more than the county logo. Our brand is the way people see the county. It's what people think of us. At the core of any brand is the organization's goals and values. These should lead people to develop an impression of us over time from what we say, how we look, and what we do. Our goal is for people to have a good impression of Pinellas County, and then to connect that good impression to our logo and other aspects of our visual identity.

Over time, the logo and other elements of our visual identity serve as shortcuts—cues—to bring out a person's impression of the county. A person sees the logo and we want them to immediately have a positive response based on their existing good impression of the county. We then want to reinforce that good impression.

What Are Our Goals and Values?

Pinellas County's vision and mission, strategic plan and values statements do an excellent job of laying the groundwork for the county's brand. They are as follows:

Vision

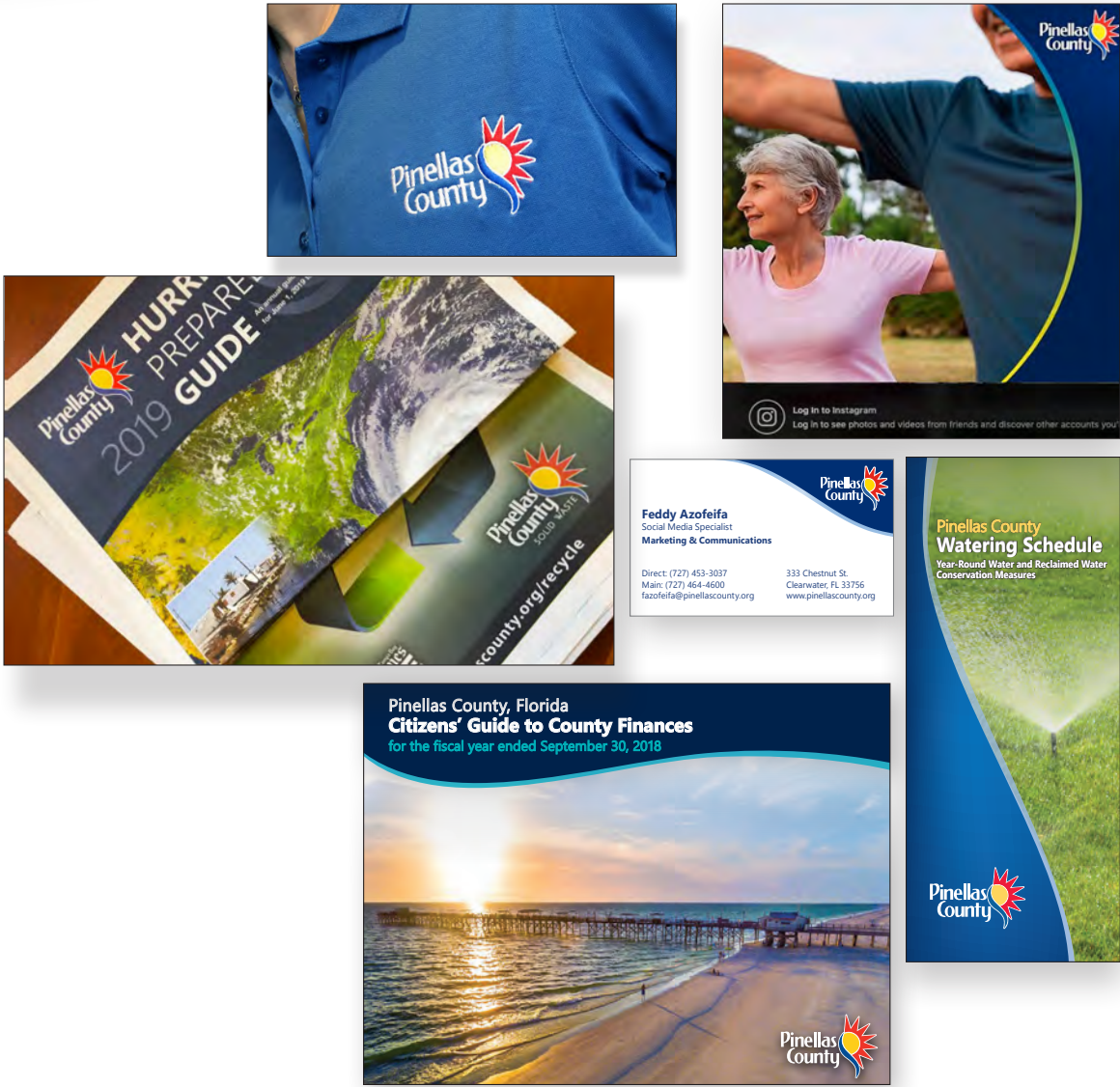
To be the standard for public service in America.

Mission

Pinellas County Government is committed to progressive public policy, superior public service, courteous public contact, judicious exercise of authority, and responsible management of public resources to meet the needs and concerns of our citizens today and tomorrow.

To achieve our vision, we place the highest importance on:

- Quality Service
- Respectful Engagement
- Responsible Resource Management



Strategic Plan

The Pinellas County Strategic Plan lays out the county's priorities:

- Create a Quality Workforce in a Positive, Supportive Organization
- Ensure Public Health, Safety, and Welfare
- Practice Superior Environmental Stewardship
- Foster Continual Economic Growth and Vitality
- Deliver First-Class Services to the Public and Our Customers

Our Values

- We will be respectful of the needs of individuals while recognizing our responsibility to the community as a whole.
- We will be community-centric, embracing the individuality of partners working together as one, toward the community's vitality.
- We believe it is our responsibility to improve the overall quality of life through the management and preservation of the natural and built environment.
- We will provide open and accountable governance.
- We will foster a diverse work culture, a safe workplace, and opportunity for professional and personal growth.

Pinellas County's Brand Position Statement

The Pinellas County brand is anchored in trust. This trust is built on four things:

1. Customer service
2. Smart use of resources
3. Partnerships
4. Getting things done

A brand position statement serves as a shortcut to help staff understand the brand and ensure that programs, activities, communications and interactions all reinforce and strengthen the brand. Such a statement is not the same as a slogan and is not used publicly. Pinellas County's brand position can be summarized as follows:

- Pinellas is the county people trust to make life better today and in the future. We earn this trust by making customers our first priority, making smart decisions and getting things done.

Pinellas County's Brand Attributes

Based on the above, the Pinellas County brand identity materials should convey through our design, typography, videography, photography and writing that the county is:

Confident

- Knowledgeable, not academic, authoritarian or bossy.

Innovative, forward-thinking, contemporary

- Worthy of trust, not stodgy or out-of-date.

Welcoming

- Happy to help, approachable, easy to understand. Appreciative of diversity and partnerships. People-focused, not confusing or institutional.

Appreciative

- Grateful for the great things in our county and of the work we do.

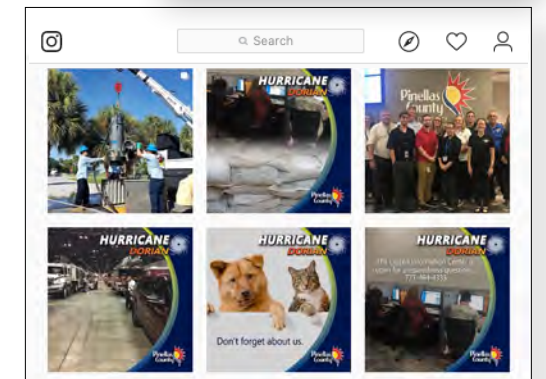
In-Touch

- Understanding what matters to our many constituencies and able to relate to them.

Professional

- Well managed, organized, smart, sensible, trustworthy, not sloppy, cluttered, or unfocused.

These are internal guidelines, not something we publish.



The County Logo

The Board of County Commissioners has chosen our logo to provide a highly recognizable symbol to identify Pinellas County. The logo is used on all media, from signs to letterhead to videos, and helps cut through the information clutter our residents and visitors encounter every day. (For logo exemptions see the end of this document.)

As part of the county's brand refresh in 2019, the logo is often reversed out of a blue wave. This new treatment is intended to refresh the look of the logo and give it more visual impact without redesigning it.

There are times when it is important to identify the public-facing department or division, such as on building and vehicle signs. When this is needed, the following format will be used:



Department or public facing workgroup name is set in Nirmala Bold UI.

Distance from top of capitals to baseline of the word "County" is twice the distance of the descender of the "y".

Text is flush left and does not extend beyond the end of the middle sun ray.



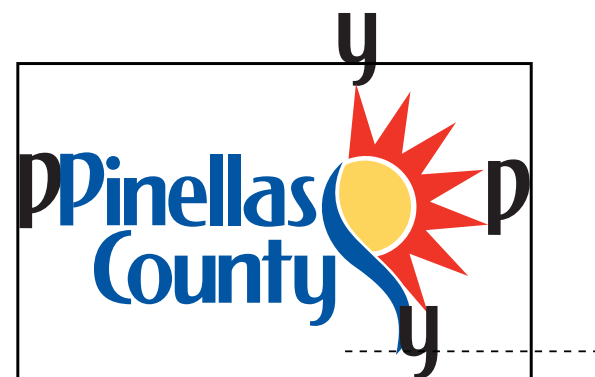
The minimum size of the logo with a department or division name is one 1.5 inches wide. If it were smaller, the type for the division name would be too small.

The minimum size of the logo by itself is **1 inch wide**.

Clear Zone Around the Logo

When placing the logo, do not crowd it next to other graphics or the edge of a page.

Keep clear the **width** of the letter "p" on the left and right. Keep the **height** of the descender of the lower case "y" clear at the top and bottom.



Clear zone around logo

For the logo to be effective, it must be used consistently. The following rules apply to the use of the logo:

1. Never distort the logo when resizing it. Hold down the shift key when you resize the logo to keep the correct proportions.
2. Do not add or delete graphic elements or connect them with any other mark, logo, graphic element or symbol.
3. Never allow the Pinellas County logo to be used by non-Pinellas County users in their own literature unless Pinellas County is a sponsor of the event or program. Approval must first be granted by Administration. Do not combine the County logo with any other logo or artwork, unless expressly approved.
4. Do not use the logo on busy backgrounds that obscure the logo.



Do not stretch the logo



Do not resize individual elements.



Do not use busy backgrounds.



Do not add text to the logo



Do not use just the sun and rays part of the logo with a phrase



Do not use just the sun and rays as individual elements

Logo Colors

Consistent use of colors helps build a coordinated and recognizable identity for Pinellas County.

The logo may be reproduced only in one color or three colors. It should never be produced in two colors or other color combinations.



Logo colors for print

	Blue:	C 100	M 72	Y 2	K 2
	Yellow:	C 0	M 6	Y 95	K 0
	Red:	C 0	M 96	Y 95	K 0

Logo colors for digital

	Blue:	R: 47	G 74	B 137
	Yellow:	R: 243	G 213	B 43
	Red:	R: 198	G 0	B 54

Logo colors in Pantone Matching System

	Blue: 653c		Blue: 287u
	Yellow: 128c		Yellow: 108u
	Red: 1795c		Red: 485u

Logo colors for digital use in hexadecimal

	Blue:	2F4A89
	Yellow:	F3D52B
	Red:	C60036

One-Color Application of Logo



Black logo
Words and rays - 100% black
Sun - 30% black
Water swish - 70% black



Blue logo
Words and rays - 100% blue
Sun - 30% blue
Water swish - 70% blue

Secondary Colors

The following complimentary colors are suggested for graphic elements (excluding the logo) in collateral and other marketing materials that reflect the five branches of the strategic plan.

	Pantone PMS 267c		Process	C 75	M 100	Y 0	K 0
	Pantone PMS 485c		Process	C 0	M 90	Y 85	K 0
	Pantone PMS 3425c		Process	C 90	M 30	Y 95	K 30
	Pantone PMS 3262c		Process	C 80	M 10	Y 45	K 0
	Pantone PMS 109c		Process	C 0	M 32	Y 100	K 0

For primary color values (Pantone, CMYK, RGB and Hexidecimal), please refer to single and multi-color application pages in this guide.

Logo on a Dark Blue Background

Type is white. The icon maintains the original color specs, with an added white border.

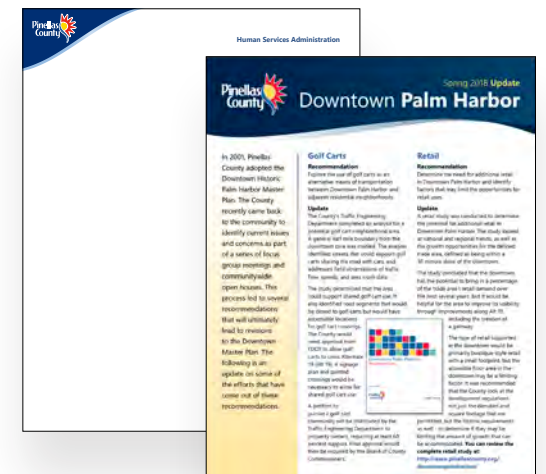
The logo should only be reversed out of a dark blue and black gradient as shown in the sample layouts in this document.



This darker blue is similar to Pantone 289c or:

C 100 **M** 62 **Y** 45 **K** 59

Contact Marketing & Communications if you would like to have an exception reviewed.



Design Elements

The following design elements are to be used to create complementary materials. Each design can be unique, but must fit within the overall family appearance to continue to build a consistent and strong visual identity.

Shapes: Circle and Wave

Two primary shapes from the Pinellas County Logo—the circle and the wave—are incorporated into designs to create a design system that reinforces our brand. These shapes are used to create layouts that have visual interest and are more organic than rigid—more fluid than boxy—much like our beautiful coastline. The shortcut for designers to remember is “Pinellas County: we’re not square.”

Repeated use of these elements will create a stronger visual identity for the county over time.

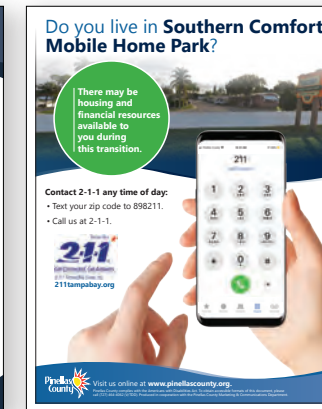
In using these shapes, do not outline them. On a second wave, a second, accent color is optional.

Use of White Space

Layouts of printed materials should not be too dense and crowded; this results in a document that is uninviting and often goes unread. Layouts should be written and designed to be easy to scan, visually open, appealing and accessible.

ADA Compliance

Pinellas County complies with Section 508 of federal Americans with Disabilities Act (ADA). Visit: www.section508.gov/create for information about creating accessible digital documents for use on Pinellas County’s website. All visuals must contain proper contrast for visibly-impaired citizens. Use <https://contrastchecker.com> to check appropriate contrast of text color.



Typography

The primary typeface used for Pinellas County materials is Nirmala UI.

The use of large, bold headings to create strong contrast on the page is encouraged. Usually these are in Nirmala UI Bold.

Body copy is usually set in Nirmala UI Regular 11 pt. or 12 pt. Calibri is an acceptable alternative.

Text is set flush left rather than justified.

Other typefaces may be used; however, the overall look should not be changed too dramatically by the choice of type.

When Setting Type, Always:

- Maintain consistent letter spacing. Do not create speed bumps of **compressed type like this** to save space.
- Use hyphens -
- En dashes –
- Em dashes —

Hyphens are used only for hyphenated words. En dashes are used to indicate a range (such as 5–9 or noon–1:00). Em dashes (—) indicate an interruption in thought. Hyphens and dashes should be set without space around them.

- Use only one space after a period. (Search and replace to resolve.)

Fonts

Nirmala Bold

Aa Bb Cc Dd Ee Ff Gg Hh Ii Jj
Kk Ll Mm Nn Oo Pp Qq Rr
Ss Tt Uu Vv Ww Xx Yy Zz
1 2 3 4 5 6 7 8 9
Pinellas County

Nirmala Regular

Aa Bb Cc Dd Ee Ff Gg Hh Ii Jj
Kk Ll Mm Nn Oo Pp Qq Rr Ss Tt
Uu Vv Ww Xx Yy Zz
1 2 3 4 5 6 7 8 9
Pinellas County

Nirmala Semilight

Aa Bb Cc Dd Ee Ff Gg Hh Ii Jj
Kk Ll Mm Nn Oo Pp Qq Rr Ss Tt
Uu Vv Ww Xx Yy Zz
1 2 3 4 5 6 7 8 9
Pinellas County

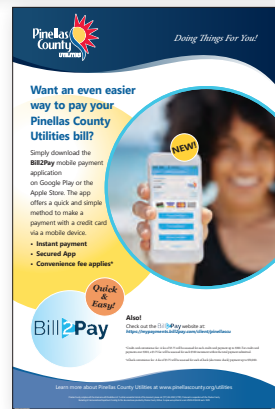
Type Considerations

- Do not leave single words ending a paragraph wrapped up to the top of a column (widows). Work with the author to edit for these or re-hyphenate the paragraph or change the length of columns to prevent.
- Do not set large amounts of body copy in light color on a dark background.
- Do not set body copy over photographs or backgrounds that make it difficult to read.
- Do not outline type.
- Do not use underlines.
- Do not hyphenate words in headlines or any level of heading. A headline that contains a hyphenated adjective, "It was a fast-paced race" is acceptable.
- Do not use italicized text in large amounts such as for long quotes. Italic (oblique for sans serif) is more difficult to read and often is less attractive, especially for sans serif typefaces for which a custom oblique version was not created.

Photography

Photography is a strong element used to build the Pinellas County brand. To reinforce our brand position, photography should follow aathese guidelines:

- Action photos are preferred
- When possible use close-ups of people who are engaged with the camera, another person or something else in the picture.
- Candid shots are preferred over posed shots.
- Original photographs are preferred over stock photography.
- Photos are often cropped in the circle or wave shape, giving them more visual interest while reinforcing the design elements of the brand.
- Silhouetted images in color of people with the background removed are often used to create more visual interest and to prevent the boxy look that traditional photographs can have.
- Use Pinellas photos as much as possible.
- Use photos to communicate the look and feel of Pinellas County.



Graphic Elements and Treatment

- Use treatments that look contemporary and energetic, such as silhouettes, cropping into circles, etc.
- Avoid heavy rules that add visual clutter.
- Strokes around photographs are discouraged. If strokes are needed for an illustration or other material in a layout, keep them thin.



Business Cards

The title/position/department name block should not exceed four lines.

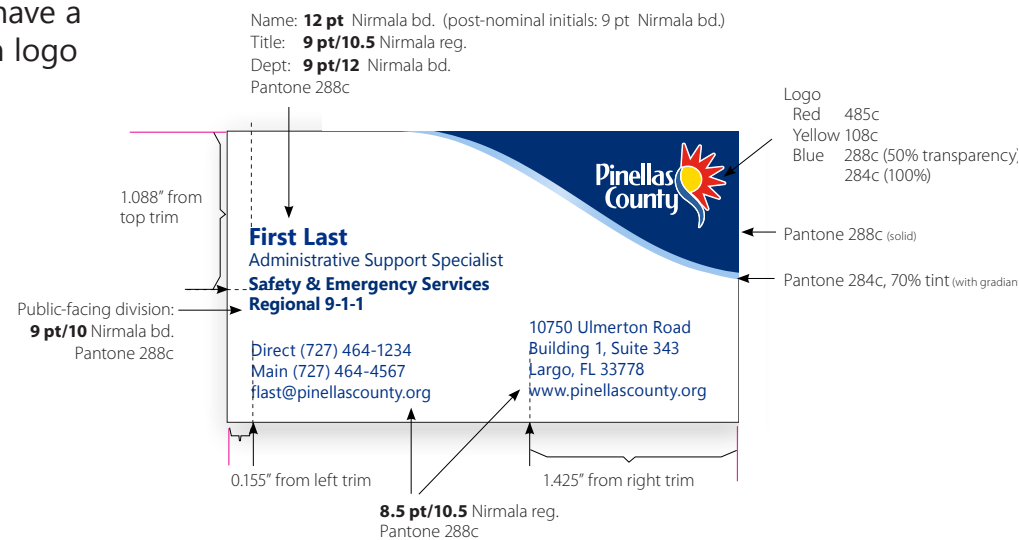
The address/homepage block should only include the Pinellas County business address and the Pinellas County web address.

The telephone/email block should include direct office phone number, main office phone number and Pinellas County email address. It should not include personal email addresses or websites, or fax numbers.

Dimensions: 2" x 3.5"

Stock: Cougar Opaque Smooth White 80 lb., cover weight (recycle fiber mix)

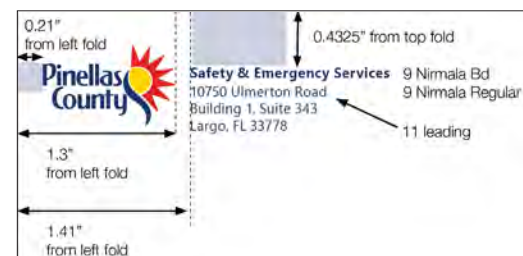
Special note: Pinellas County Public Works business cards are allowed to have a secondary, APWA accreditation logo on their business cards.



This business card template is available to order from the Clerk's Printing Services at <https://printingservices.co.pinellas.fl.us/> under the "Printing Order" top menu tab and clicking the "Business Cards" category.

Envelope

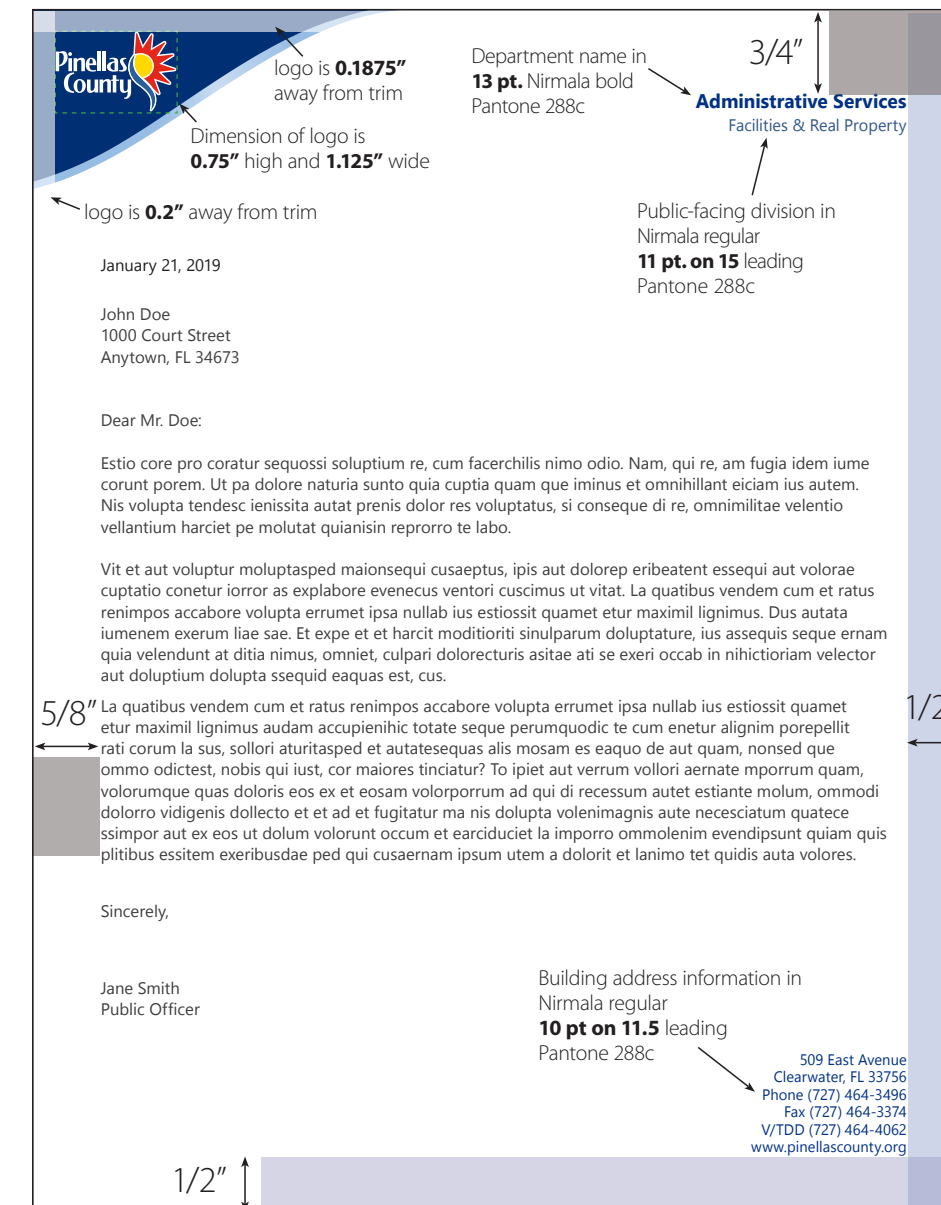
The department name and address block should not exceed five lines.



Letterhead

The primary purpose of printed information on the letterhead is to provide location information for responses. The building, city, state and 5-digit zip code are flush right in the bottom right corner. The stationery should also include the office telephone numbers with area code in parenthesis.

Order letterhead at <https://printingservices.co.pinellas.fl.us/> under the "Printing Order" top menu tab and clicking the "3 Color County Letterhead 8 1/2" X 11" category.



Embroidery

Pinellas County staff shirts feature the logo with 'Pinellas County' in a white thread and three Pantone colors for the sun:

Pantone blue: 653 coated

Pantone yellow: 128 coated

Pantone red: 1795 coated

The preferred shirt color is Pantone 7454 c. The dimensions of the embroidery should be approximately 3" tall x 4" wide.

Department names are optional. Please contact Marketing & Communications if you would like to have an eps file prepared for a vendor.



Name Badges

Department directors may purchase name badges for employees who work directly with the public. Name badges identify employees by name and department or in some cases, public-facing division. The badges may be purchased at www.pinellasrubberstamp.com. Click on "New to our site?" to begin registration or contact (727) 545-0575 to register. Pinellas Rubber Stamp has an online intake form to key in the desired name badge information.



16 pt Nirmala Bold, Name
14 pt Nirmala Regular, Dept
/17 leading

Other County Logos

As a general rule, programs and services under the BCC use the main county logo. By using the logo consistently across departments, we reinforce that we are all one county government and we strengthen the logo's ability to cut through the clutter and help our programs and services be recognized as county programs.

Creating division- or program-level logos that are unrelated to the county logo can erode the strength of the county brand and can cause confusion about whether a program or service is provided by the county. For this reason, we do not generally create logos for programs.

When do we make exceptions?

- 1. When a program or service needs to build unique personality and has a purpose that is not generally thought of as closely tied to the county's core functions and identity.** For example, the Florida Botanical Gardens benefits from having its own identity that helps to promote it as a tourism destination. In this case, the Gardens has its own logo, with the tagline "A Pinellas County Government Program" to ensure that the County receives recognition for funding the program. Similarly, Visit St. Pete/Clearwater is the public-facing brand for tourism. It benefits tourism promotion to focus on primary tourist destinations rather than on our county government, so a separate brand is used.
- 2. When a program is a coalition of a variety of organizations that equally sponsor and participate,** such as the Stormwater Wastewater Partnership. While such initiatives do not always need a logo, there may be times when one is warranted.
- 3. When there is a need to create a strong visual identity and positive sentiment about a specific campaign and little need to associate that with the county government.** For example, the Penny for Pinellas is a brand that has been used for years to promote the benefits of the one-cent sales tax to support infrastructure. This is an educational campaign providing objective information about how the sales tax is used. As a stand-alone brand, it can be adopted by businesses and others who advocate for the infrastructure sales tax as a shared idea owned by the community, not the county government.

Division Logos

Exemptions from the Pinellas County logo

The following logos are grandfathered in from previous exemptions:

Economic Development logo with tagline,
A Pinellas County Government Program



South Cross Bayou Water Reclamation Facility logo
with tagline, A Pinellas County Government Program



Pinellas County Extension logo



Florida Botanical Gardens logo with tagline,
A Pinellas County Government Program



Heritage Village logo with tagline,
A Pinellas County Government Program



Brooker Creek Preserve logo with tagline,
A Pinellas County Government Program



Weedon Island Preserve logo with tagline,
A Pinellas County Government Program



Star Center logo with tagline,
A Pinellas County Government Program



PIE logo for St. Pete Clearwater International Airport



Wastewater • Stormwater logo for a
Pinellas partnership



Visit St. Pete/Clearwater logo for
Convention & Visitors Bureau



Forward Pinellas logo



Watershed logo for
Public Works Environmental Department



Sunstar logo with tagline,
A Pinellas County Government Service





Nine Principles
The Florida Friendly
Spine emphasizes and
encourages that you'll have
a great seating your
See more for more about

FY2020 ANNUAL OPERATING AND CAPITAL BUDGET

The Nine Principles
The new Pinellas County Land Management
Program, program and plan, including
the new and new. If you are planning your
program, please contact your more, including your
email, or phone about **The Nine Principles**

FY2020 Annual Operating and Capital Budget

Pinellas Census Committee Launches Outreach

Your Census response is confidential and protected
In early 2020, the Census Bureau will begin to complete the census data collection process.
The Census count data will be used to represent the county's needs.
• Highways and
• Health
• Housing

TAKE THE 2020 CENSUS

20 Years of Progress