



## PURCHASING DIVISION

Charlotte County Administration Center  
18500 Murdock Circle, Suite 344  
Port Charlotte, Florida 33948-1094

Phone 941.743.1378  
Fax 941.743.1384

TO: PROSPECTIVE PROPOSERS

DATE: JULY 24, 2025

RE: ADDENDUM #3, RFP NO. 20250502, ECONOMIC DEVELOPMENT MARKETING SERVICES - ANNUAL

PROPOSAL DUE DATE: 3:00 p.m. (EST), JULY 29, 2025

Firms are hereby notified that this addendum shall be made a part of the above-named proposal and contract documents. The following are issued to revise/clarify the proposal and contract documents, and these items shall have the same force and effect as the original proposal and contract documents. Proposals to be submitted on the above-specified date at Purchasing shall conform to the revisions and clarifications as listed herein.

### ITEM # 1 QUESTIONS/ANSWERS

**Q1. We understand that media buys are not included in the stated annual agency budget, but does the \$99,000 budget include the production of print advertising and collateral materials?**

A1. The \$99,000 budget includes the design and development of all or portions of our advertising and collateral materials; however, actual printing may be handled locally and is not necessarily included in the budget.

**Q2. Does the Charlotte County Economic Development Office wish to keep the "Your Business. Cleared for Takeoff." messaging and branding, or is the Office interested in a potential rebrand or brand evolution? If the latter, should we and may we include initial brand strength evaluators and brand strategy consultation in our proposal? Or should responses be geared only toward marketing activation and program management?**

A2. Rebranding is not planned for this budget cycle; however, we are open to fresh ideas and brand evolution that help set us apart.

**Q3. Will you share any existing marketing strategies and strategic plans that may be helpful in the formation of the proposal?**

A3. Yes (see attached), however we are open to fresh/new ideas and approaches.

**Q4. Will the contractor be expected to provide social media management services, such as regularly scheduled posting, community engagement, and account management?**

A4. Typically no, this is usually done in-house, but that could change depending on future needs.

**Q5. Are you interested in public relations services to further economic development marketing efforts?**

A5. Typically no, this is usually done in-house, but that could change depending on future needs.

**Q6. Is there an incumbent agency for this project?**

A6. Maris West and Baker, Inc.

This addendum is binding and is to be considered as if contained within the original proposal documents of RFP No. 20250502. Firms are required to acknowledge receipt of this addendum on their proposal forms.

*Kimberly Corbett*

Kimberly Corbett, C.P.M., CPPB  
Senior Division Manager - Purchasing

KC/at

cc: Clerk  
File



# **Charlotte County**

## **Economic Development Office**

### **Strategic Plan**

#### **2025 – 2030**

**Prepared by: Charlotte County Economic Development Office**



## **Charlotte County Economic Development Office (EDO) Strategic Plan**

### **Index:**

- 1. Executive Summary**
- 2. Mission Statement**
- 3. Vision Statement**
- 4. Core Values**
- 5. Six Pillar Strategy**
- 6. Situational Analysis**
  - **SWOT Analysis**
  - **Market/Industry Trends**
  - **Competitive Analysis**
- 7. Six Pillar Strategies, Key Areas of Focus and Action Plans**
- 8. Objectives and Key Performance Indicators (KPIs)**
- 9. Risk Assessment and Mitigation Strategies**
- 10. Financial Plan**
- 11. Monitoring, Evaluation, and Adjustments**
- 12. Appendices and Supporting Documents**
  - **Market Trend Reports**
  - **Industry Sector Analysis**
  - **Economic Impact Studies**
  - **Business Recruitment and Expansion Case Studies**



## Charlotte County Economic Development Office (EDO) Strategic Plan

### Executive Summary:

The Charlotte County Economic Development Office is proud to present our Strategic Plan a comprehensive blueprint designed to enhance the economic health and sustainability of our region. Our mission is clear: To foster an environment that attracts high-wage industries, bolsters workforce development, and strengthens the local tax base. Our six pillars are vital to securing long-term prosperity and a thriving community for all.

This plan is rooted in listening to the voices of our local businesses, data research, and understanding the needs of a sustainable economy. It emphasizes fostering economic resilience through thoughtful investments in our workforce and infrastructure. By prioritizing initiatives such as workforce housing, training programs, and other business-critical needs, we are laying the groundwork for a thriving economy powered by a skilled and supported workforce. At the same time, we remain committed to driving quality growth by attracting innovative industries and empowering existing businesses to expand. This aligns with Charlotte County's bold goals and vision to increase opportunities for industrial development in Charlotte County and drive Charlotte County's transformation into a leading destination for skilled professionals, featuring thriving jobs, workforce housing, and vibrant opportunities.

Importantly, this plan includes a future-facing strategy to meet the demands of our growing population and evolving economy. It integrates a series of new growth positions between 2027 and 2035 to address emerging need. We align every initiative, policy, and partnership with the vision and strategic goals of the Charlotte County Commission. Economic sustainability is not just a goal it is a commitment to our residents, businesses, and future generations. Through strategic leadership, data-driven policies, and targeted incentives, we aim to build a robust economy that generates high-wage job opportunities and enhances the quality of life in Charlotte County. This plan reflects the collaborative efforts of our team and stakeholders, ensuring that our community remains a premier destination for businesses and families alike.

Our approach is dynamic and adaptable, guided by measurable outcomes and ongoing engagement with our partners. By working together, we will transform challenges into opportunities and continue to make Charlotte County a leader in sustainable economic development.

Sincerely,

Kay Tracy, Director  
Charlotte County Economic Development Office



## Mission Statement

The Charlotte County Economic Development Office drives growth and opportunity for the community by attracting diversified target businesses, creating high-wage jobs, and expanding the tax base to ensure long-term prosperity.

**Vision Statement** Charlotte County aims to be a premier destination for high-wage industries, fostering innovation, resilience, and seamless opportunities for living, working, and doing business.

## Core Values

- **Innovation:** Encouraging forward-thinking solutions.
- **Collaboration:** Partnering with businesses, government, and the community.
- **Sustainability:** Promoting long-term economic health.
- **Accountability:** Maintaining transparency and measurable outcomes.
- **Excellence:** Striving for the highest standards in economic development.

## Six Pillar Strategy:

- **Strategic Leadership**
- **Business Retention & Expansion (BRE)**
- **Business Recruitment**
- **Marketing & Communications**
- **Data Research & Strategic Mapping**
- **Operational Excellence**

These pillars are foundational to achieving the mission and vision of the Charlotte County Economic Development Office. Each pillar supports specific goals and initiatives aimed at fostering economic growth and enhancing the quality of life for residents.



## Situational Analysis

- **SWOT Analysis:**

- **Strengths:** Strategic location with access to major transportation networks, growing workforce, favorable tax environment, strong community engagement, and adaptable with business-friendly policies.
- **Weaknesses:** Limited availability of workforce housing, aging workforce population who will be retiring in the next 15 years, workforce is traveling out of the county for jobs, workforce skill gaps in specialized industries, limited industrial development zoning in Charlotte County, infrastructure constraints in high-growth areas, and vulnerability to natural disasters.
- **Opportunities:** Expansion of skilled workforce recruiting and training programs to support target industries, infrastructure improvements, available land to increase opportunities for industrial development in Charlotte County targeted industry recruitment (such as aerospace and advanced manufacturing), tourism growth, and increased public-private partnerships.
- **Threats:** Economic downturns, competition from neighboring regions, potential over-reliance on specific industries, limited industrial development zoning, limited availability of workforce housing, aging workforce population and climate impacts affecting coastal areas.

- **Market/Industry Trends:**

- **Rise of Advanced Manufacturing:** Increased interest in aerospace, defense, and high-tech manufacturing due to favorable economic incentives and infrastructure investments.
- **Growth in Logistics and Distribution:** Expansion of logistics and warehousing sectors driven by proximity to major ports and interstate highways.
- **Remote Work and Hybrid Workforce Expansion:** Shifts in workforce dynamics leading to increased demand for co-working spaces, remote workforce infrastructure, and broadband expansion.
- **Healthcare Sector Growth:** Rising demand for healthcare services due to an aging population, increasing investment in medical technology and healthcare-related industries.
- **Tourism and Hospitality Industry Resurgence:** Continued recovery from the pandemic, with increased investment in eco-tourism, waterfront developments, and hospitality infrastructure.
- **Renewable Energy and Sustainability Initiatives:** Growing focus on green energy solutions, including solar and clean technology investments to attract environmentally conscious businesses.
- **Housing Market Challenges:** Increased demand for workforce and affordable housing solutions to support economic expansion and talent retention.



- **Competitive Analysis:**

- **Business Climate:** Charlotte County offers a favorable tax structure, competitive economic incentives, and a business-friendly regulatory environment, making it an attractive location compared to neighboring counties such as Sarasota and Lee.
- **Workforce and Talent Pool:** While Charlotte County has a growing workforce, it faces competition from larger metropolitan areas like Tampa and Fort Myers, which may offer a deeper talent pool and more diverse industries. Additionally, limited access to affordable, high-quality childcare presents a challenge for workforce participation, particularly for working parents, as well as enhancing family-friendly amenities that could help attract and retain a younger workforce.
- **Infrastructure and Connectivity:** Charlotte County's access to major highways and proximity to Southwest Florida International Airport provides competitive advantages, but continued investment in transportation and broadband infrastructure is needed to keep pace with regional peers.
- **Industry Specialization:** While Sarasota excels in cultural tourism and health services, and Lee County is a hub for retail and commercial development, Charlotte County is carving a niche in aerospace, manufacturing, logistics and cybersecurity. Expanding childcare options (such as employer-supported childcare solutions) will support these industries by ensuring a reliable and engaged workforce.
- **Quality of Life:** Charlotte County offers a high quality of life with lower congestion and cost of living compared to larger urban areas, making it an appealing destination for businesses and skilled workers. To further attract young professionals and families, the county continues to expand recreational opportunities, including waterfront parks, sports complexes, cultural events, entertainment districts, and family-friendly activities such as youth programs, outdoor festivals, and adventure parks. Addressing childcare accessibility and enhancing nightlife, dining, and social venues will further position Charlotte County as a dynamic place to live, work, and play.



## Strategic Priorities and Goals

The six pillars underpinning this strategic plan include:

1. **Strategic Leadership** – Enhancing policy advocacy, stakeholder engagement, and resource allocation.
2. **Business Retention & Expansion (BRE)** – Supporting local businesses and workforce development.
3. **Business Recruitment** – Attracting targeted industries to drive diversification.
4. **Marketing & Communications** – Strengthening the county’s brand and visibility.
5. **Data Research & Strategic Mapping** – Using analytics to guide economic decision-making.
6. **Operational Excellence** – Improving internal processes and team performance.

## Objectives and Key Performance Indicators (KPIs)

- **Capital Investment:** Secure \$50 million in annual business investment.
- **Job Creation:** Generate high-wage employment in targeted industries.
- **Business Retention:** Conduct 50+ annual BRE visits to maintain a strong business climate.
- **Marketing Effectiveness:** Increase digital engagement by 20% year-over-year.
- **Workforce Development Impact:** Expand training programs and measure job placements.

## Six Pillars Strategies, Key Areas of Focus and Action Plans

### 1. Strategic Leadership

*Providing visionary leadership, policy advocacy, and stakeholder engagement to drive economic development.*

#### Areas of Focus:

1. Strategic Leadership: Setting the vision, mission, and goals for the department.
2. Stakeholder Engagement: Building relationships with key stakeholders throughout the community, region, and state.
3. Policy Development: Shaping and advocating for economic policies.
4. Resource Allocation: Overseeing budgets, staff, and resources efficiently.
5. Incentive Management: Structuring and managing financial incentives to attract businesses, and drive Charlotte County’s transformation into a leading destination for skilled professionals, featuring thriving jobs, workforce housing, and vibrant opportunities.
6. Crisis Management: Responding to unexpected challenges.

**Goals:**

- Provide visionary leadership to guide EDO activities.
- Build and maintain relationships with stakeholders, including local and state government officials and industry leaders.
- Advocate for workforce development, infrastructure investment, economic sustainability, and increase opportunities for industrial development.
- Oversee the development and execution of the strategic plan.
- Promote Charlotte County's economic opportunities locally and nationally.

**Initiatives:**

- Develop an annual strategic plan review process.
- Host strategy sessions with team leads.
- Engage in regular policy advocacy with local and state government officials.
- Tailor incentive packages for targeted industries to enhance recruitment efforts and to support high-wage industries.
- Advocate for comprehensive workforce-critical solutions including workforce housing, skilled worker training, and other critical business need initiatives to support a thriving workforce.
- Establish partnerships with venture capital firms and funding organizations to attract innovative businesses.
- Advocate for zoning adjustments and infrastructure enhancements to promote workforce housing development near employment hubs.

**2027 Growth Position:****Workforce Programs Manager**

- Aligns workforce strategy with employer needs – the Next Generation of Workforce
- Supports small business development – Main Street
- Leads grant writing and incentive compliance
- Drives commercial corridor recruitment

**Strategic Need:** Critical consolidation of scattered functions to address rising retirements and workforce shortages. Streamlines workforce and funding alignment with economic goals.



## **2. Business Retention & Expansion (BRE)**

*Supporting existing businesses to foster economic stability and job growth.*

### **Areas of Focus:**

1. Retention of Existing Businesses: Build relationships and address business needs.
2. Expansion Support: Assist businesses in scaling operations and economic sustainability.
3. Workforce Development: Collaborate with educational institutions and training programs to align workforce training programs with employer needs.
4. Business Data Analysis: Monitor trends and identify risks.
5. Community Engagement: Foster corporate responsibility and local support and promote Charlotte County's transformation into a leading destination for skilled professionals, featuring thriving jobs, workforce housing, and vibrant opportunities.

### **Goals:**

- Conduct 50+ annual BRE site visits.
- Develop and implement an annual BRE plan and business support toolkit.
- Organize roundtables with industry stakeholders.
- Establish a mentorship program for emerging entrepreneurs.
- Launch an annual BRE impact report highlighting business trends and expansion efforts.

### **Initiatives:**

- Create a BRE toolkit including workforce development resources and incentive guides.
- Establish a schedule for site visits and follow-up reports.
- Partner with local training programs to align skills development with business needs and sustain a high-wage economy.
- Travel to tradeshow to help with business recruitment efforts and promote Charlotte County to targeted defense contractor businesses.
- Develop an outreach program for at-risk businesses to address challenges proactively.
- Create presentations to promote Charlotte County.
- Collaborate with housing developers to address workforce housing needs and explore solutions to expand workforce critical need options near employment hubs.

### **2034 Growth Position:**

#### **Public Relations & Strategic Partnerships Manager**

- Manages business-government communication
- Develops institutional partnerships
- Resolves regulatory bottlenecks

**Strategic Need:** Critical to fostering trust and partnerships across public, private, and academic sectors as BRE complexity grows.



### **3. Business Recruitment**

*Attracting high-wage industries and fostering economic diversification.*

#### **Areas of Focus:**

1. New Business Attraction: Identify and recruit high-wage targeted industries.
2. Industry Targeting: Focus on sectors aligned with EDO's goals and target sectors and promote Charlotte County's transformation into a leading destination for skilled professionals, featuring thriving jobs, workforce housing, and vibrant opportunities.
3. Networking: Build relationships with site selectors and industry representatives.
4. Event Participation: Represent the county at trade shows and conferences.

#### **Goals:**

- Recruit five high-wage industry employers annually.
- Create a comprehensive Business Recruitment Plan with a quarterly/annual impact report.
- Lead Conversion Rate – Convert industry leads into new business investments.
- Economic Impact of New Businesses – Ensure a collective minimum annual capital investment of \$50 million.
- Launch a comprehensive Business Recruitment Plan impact report highlighting business trends and expansion efforts.
- Travel to tradeshow for business recruitment and promote Charlotte County to targeted businesses.
- Assist with BRE site visits when necessary.
- Organize 10 site tours highlighting key properties and assets.

#### **Initiatives:**

- Develop a lead tracking system to monitor recruitment efforts.
- Organize site tours highlighting key properties and assets.
- Build industry-specific recruitment and soft-landing packages tailored to targeted sectors and cluster industries.

#### **2032 Growth Position:**

##### **International Business & Innovation Manager**

- Builds FDI relationships
- Integrates smart city/innovation strategy
- Supports global exports from Charlotte County firms

**Strategic Need:** Enhances global market connectivity and prepares the county to compete for FDI and tech-driven industry growth.



#### **4. Marketing and Communications**

*Enhancing Charlotte County's brand as a premier business and workforce destination.*

##### **Areas of Focus:**

1. Branding & Messaging: Create a compelling image for the county increasing visibility.
2. Digital Marketing: Strengthen and manage social media, websites, and campaigns.
3. Content Development: Produce brochures, videos, and presentations.
4. Campaign Management: Targeted initiatives for specific audiences and stakeholders.
5. Analytics & Reporting: Measure marketing effectiveness.

##### **Goals:**

- Increase website traffic by 20% annually.
- Execute 3-5 signature campaigns annually.
- Launch quarterly newsletters and expand social media campaign's ROI achieving 75% higher engagement.
- Strengthen brand visibility through trade shows and conferences.
- Promote Charlotte County's transformation into a leading destination for skilled professionals, featuring thriving jobs, workforce housing, and vibrant opportunities.
- Earned Media Placements – Secure at least 15 media features annually.

##### **Initiatives:**

- Develop targeted ad campaigns focusing on key industries, workforce (PCS) and county.
- Create video testimonials showcasing business success stories.
- Host webinars for community, partners and investors.
- Regularly update SEO strategies to improve online visibility.
- Strengthen brand presence at trade shows and conferences.

##### **2034 Growth Position:**

###### **Public Relations & Strategic Partnerships Manager**

- Doubles as the lead communications officer
- Enhances message consistency and public outreach
- Coordinates earned media and public education efforts

**Strategic Need:** Bridges internal economic goals with external storytelling to build investor confidence and community buy-in.



## 5. Data Research and Strategic Mapping

*Utilizing data-driven insights to guide economic planning and decision-making.*

### Areas of Focus:

- Conduct economic impact analysis and market research.
- Use geographic information systems (GIS) for strategic site selection.
- Provide predictive analytics for economic forecasting.

### Goals:

- Develop an interactive economic data dashboard.
- Completed and publish a quarterly/annual economic impact analysis.
- Map housing, industrial and commercial zones.
- Develop predictive analytics models for workforce and economic forecasting.
- Promote Charlotte County's transformation into a leading destination for skilled professionals, featuring thriving jobs, workforce housing, and vibrant opportunities.

### Initiatives:

- Enhance GIS mapping capabilities for real-time property and zoning data.
- Automate data collection processes for workforce and industry metrics.
- Report economic trend forecasting models using Power BI, forecast resources and analyze their impacts.
- Publish quarterly economic performance newsletters for stakeholders.
- Create heatmaps and analysis of housing availability, affordability, and childcare access to inform workforce development strategies.

### 2030 Growth Position:

#### Real Estate, Infrastructure & Sustainability Manager

- Maintains up-to-date property inventory
- Coordinates with utility and transportation agencies
- Champions green and resilient development practices

**Strategic Need:** As demand for development accelerates, a dedicated expert is essential to balance growth with infrastructure and environmental goals.



## 6. Operational Excellence

*Enhancing internal efficiency, team development, and organizational performance.*

### **Areas of Focus:**

- Improve project management and operational efficiency.
- Develop professional growth opportunities for staff.
- Strengthen internal and external communication protocols.

### **Goals:**

- Improve internal operational efficiency through project management tools.
- Develop onboarding programs and professional development for staff.
- Enhance internal and external communication protocols.
- Create and distribute annual and strategic reports.
- Foster a culture of workplace wellness and team building.

### **Initiatives:**

- Implement project management software for task tracking.
- Manage mentorship programs, training, travel, operational for employees.
- Schedule bi-annual team-building retreats and activities.
- Create a centralized repository and record keeping for departmental reports and documents.

### **2027–2035 Integration:**

All newly proposed positions (Workforce, Real Estate, International Business, and PR/Strategic Partnerships Managers) will support interdepartmental excellence through cross-training, documentation, and mentorship responsibilities aligned with this pillar.



## Implementation Timeline

### 1. Short-Term (0-12 months):

- Launch BRE tracking system and implement workforce and Business Recruitment efforts.
- Develop marketing campaigns and enhance digital presence.
- Initiate stakeholder roundtables and mentorship programs.

### 2. Medium-Term (1-3 years):

- Secure increased opportunities for industrial development in Charlotte County.
- Drive Charlotte County's transformation into a leading destination for skilled professionals, featuring thriving jobs, workforce housing, and vibrant opportunities.
- Expand workforce development partnerships.
- Evaluate and refine strategic goals.

### 3. Long-Term (3-5 years):

- Monitor performance metrics and adjust plans.
- Foster regional and national partnerships.
- Achieve target business recruitment and retention metrics.

## Financial Plan

### • Diversified Funding Sources:

- **Grants:** State and federal grants for workforce training, business development, and infrastructure improvements.
- **Public-Private Partnerships:** Collaboration with local businesses, investors, and developers to co-fund initiatives.
- **State/Federal Support:** Advocacy for state and federal funding to enhance regional economic projects.
- **Incentives:** Review structured financial incentives to attract and retain high-value businesses.



## Stakeholder Engagement Plan

- **Regular Roundtables with Business Leaders:** Facilitate open discussions with industry leaders, entrepreneurs, and investors to ensure their needs are met and to drive economic collaboration.
- **Public-Private Collaboration on Infrastructure and Workforce Solutions:** Partner with local businesses, educational institutions, and government agencies to improve workforce development and enhance regional infrastructure.
- **Community Outreach Programs:** Engage residents and community organizations in economic development efforts through town halls, public forums, and advisory committees to ensure inclusive and sustainable economic growth.
- **Strategic Partnerships:** Foster relationships with state and federal agencies, regional economic development organizations, and nonprofit entities to expand funding opportunities and business support initiatives.
- **Digital Engagement and Transparency:** Maintain a strong online presence through regular updates, newsletters, and social media campaigns to keep stakeholders informed and involved in economic development activities.

## Risk Assessment and Mitigation Strategies

- **Economic Downturn:** Diversify target industries to reduce reliance on one sector and build economic resilience.
- **Workforce Shortages:** Invest in training programs, apprenticeships, workforce recruitment and workforce housing solutions to attract and retain skilled workers.
- **Infrastructure Gaps:** Advocate for expanded transportation networks, broadband access, and utility enhancements to support business growth.
- **Natural Disasters and Climate Change:** Implement climate-resilient planning and disaster recovery initiatives to mitigate economic disruptions.
- **Competitive Market Pressures:** Strengthen business incentive programs and enhance marketing efforts to attract and retain businesses in high-growth industries, as well as skilled workforce.

## Monitoring, Evaluation, and Adjustments

- **Annual Reports:** Measuring capital investment, job creation, and business expansion.
- **Quarterly Reviews:** Assessing marketing reach and economic trends.
- **Stakeholder Feedback:** Continuous input from businesses and community partners.



## Appendices and Sources:

- **Market trend reports:**
  - Florida Department of Economic Opportunity (DEO) Reports – Labor market and industry trends.
  - Bureau of Economic Analysis (BEA) – U.S. economic data and regional GDP growth.
  - Federal Reserve Bank of St Louis Economic Data – Regional economic indicators.
- **Industry sector analysis:**
  - Enterprise Florida Industry Profiles – Sector-specific business growth and investment trends.
  - Southwest Florida Economic Development Alliance Reports – Industry strengths and opportunities.
  - U.S. Census Bureau Business & Industry Data – Employment, workforce, and business statistics.
  - Florida Chamber Foundation Economic Outlook – Long-term growth projections.
- **Economic impact studies:**
  - University of Florida Bureau of Economic and Business Research (BEBR) – Economic and demographic studies.
  - IMPLAN Economic Modeling Software Reports – Regional economic impact assessments.
  - Florida Tax Watch Studies – Public policy and economic evaluations.
- **Business recruitment and expansion case studies:**
  - Site Selection Magazine – Corporate expansion and relocation case studies.
  - Florida Power & Light (FPL) Economic Development Data – Infrastructure and energy incentives for business growth.
  - SelectFlorida Reports – Business attraction strategies and site selection data.



## PURCHASING DIVISION

Charlotte County Administration Center  
18500 Murdock Circle, Suite 344  
Port Charlotte, Florida 33948-1094

Phone 941.743.1378  
Fax 941.743.1384

**TO: PROSPECTIVE PROPOSERS**

**DATE: JULY 18, 2025**

**RE: ADDENDUM #2, RFP NO. 20250502, ECONOMIC DEVELOPMENT MARKETING SERVICES - ANNUAL**

**PROPOSAL DUE DATE: 3:00 p.m. (EST), JULY 29, 2025**

Firms are hereby notified that this addendum shall be made a part of the above-named proposal and contract documents. The following are issued to revise/clarify the proposal and contract documents, and these items shall have the same force and effect as the original proposal and contract documents. Proposals to be submitted on the above-specified date at Purchasing shall conform to the revisions and clarifications as listed herein.

### ITEM # 1 QUESTIONS/ANSWERS

- Q1. Is funding for this project through a grant, general budget line item, or a special allocation?**  
A1. Budget line item.
- Q2. The RFP notes that vendors can be renewed for up to two additional one-year terms for a total of three years. Will the existing vendor be eligible/bidding on the project?**  
A2. Yes.
- Q3. I believe the existing vendor has been providing services for you for three total years, since 2022.**  
A3. Yes.
- Q4. Are you unhappy with the service/outcomes you received from the existing vendor and are now looking for a new vendor or is this RFP just a procurement requirement in order to renew the existing vendor's contract?**  
A4. We are changing the scope of services and, as a result, need to conduct a competitive comparison to ensure we select the vendor that best aligns with our updated requirements. This RFP is part of a genuine evaluation process and is not simply a formality.
- Q5. Is there a preference for a local vendor?**  
A5. Charlotte County does not have a local preference.
- Q6. Have the personnel who will serve as Selection Committee Evaluators changed since the last review?**  
A6. Some, not all.

This addendum is binding and is to be considered as if contained within the original proposal documents of RFP No. 20250502. Firms are required to acknowledge receipt of this addendum on their proposal forms.

*Kimberly Corbett*

Kimberly Corbett, C.P.M., CPPB  
Senior Division Manager - Purchasing

KC/at

cc: Clerk  
File



## PURCHASING DIVISION

Charlotte County Administration Center  
18500 Murdock Circle, Suite 344  
Port Charlotte, Florida 33948-1094

Phone 941.743.1378  
Fax 941.743.1384

**TO: PROSPECTIVE PROPOSERS**

**DATE: JULY 8, 2025**

**RE: ADDENDUM #1, RFP NO. 20250502, ECONOMIC DEVELOPMENT MARKETING SERVICES - ANNUAL**

**PROPOSAL DUE DATE: 3:00 p.m. (EST), JULY 29, 2025**

Firms are hereby notified that this addendum shall be made a part of the above-named proposal and contract documents. The following are issued to revise/clarify the proposal and contract documents, and these items shall have the same force and effect as the original proposal and contract documents. Proposals to be submitted on the above-specified date at Purchasing shall conform to the revisions and clarifications as listed herein.

### **ITEM # 1 QUESTIONS/ANSWERS**

**Q1. Could you confirm if the \$99,000 annual budget is strictly for creative/services, or if travel expenses (if required) would be billed separately?**

A1. \$99,000 includes travel. Any travel expenses would need to be incorporated into the hourly rate fee.

**Q2. Are there specific target industries or geographic regions the County prioritizes for the "lead generation campaigns" mentioned in RP-21?**

A2. There are specific industries and locations we will strategically target.

**Q3. For "interactive asset maps" and "videography," should we assume the County will provide raw GIS data/visual assets, or will the vendor handle sourcing?**

A3. Charlotte County will provide raw GIS data.

**Q4. Does the County prefer a fixed-fee or hourly-rate structure for tasks like "website updates" and "newsletter support" under RP-21?**

A4. We prefer an hourly rate.

**Q5. Are there existing brand guidelines or messaging frameworks the awarded vendor must adhere to?**

A5. We have a branding guide with colors/logos, PCS branding, Cleared4takeoff, Live in Paradise and several campaigns that directly support our strategic goals.

This addendum is binding and is to be considered as if contained within the original proposal documents of RFP No. 20250502. Firms are required to acknowledge receipt of this addendum on their proposal forms.

*Kimberly Corbett*

Kimberly Corbett, C.P.M., CPPB  
Senior Division Manager - Purchasing

KC/at

cc: Clerk  
File



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

Phone 941.743.1378

## NOTICE OF AVAILABILITY

REQUEST FOR PROPOSALS  
CHARLOTTE COUNTY, FLORIDA

The County of Charlotte will be receiving sealed proposals at the Purchasing Division, Suite 344, Charlotte County Administration Center, 18500 Murdock Circle, Port Charlotte, FL 33948-1094, for:

### **RFP NO. 20250502 ECONOMIC DEVELOPMENT MARKETING SERVICES – ANNUAL CONTRACT**

This is for an annual contract with a full-service economic development marketing firm that can provide strategic planning as well as develop and execute marketing initiatives targeted to site selectors, business and industries considering expansions and relocations, commercial developers, and key audiences in an effort to support the Charlotte County Economic Development mission.

**There will not be a Pre-Submittal Conference for this project. Please send all questions to the email address below.**

**PROPOSAL DUE DATE: 3:00 p.m. (EST), JULY 29, 2025  
PURCHASING DIVISION CONFERENCE ROOM**

Proposal Documents may be obtained by accessing the Charlotte County Purchasing Division's website at <https://purchasingbids.charlottecountyfl.gov> under "Purchasing Bids Online", document number 255022. Any questions can be answered by contacting Alisa L. True, CPPB, Senior Contract Specialist at 941.743.1549, or email: [Alisa.True@CharlotteCountyFL.gov](mailto:Alisa.True@CharlotteCountyFL.gov)

**ELECTRONIC BID SUBMISSIONS:** All submittals for this project shall be submitted electronically. Please visit <http://bit.ly/3TYAyKa> and follow given instructions.

Notice of Availability  
Posted: July 2, 2025



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

Phone 941.743.1378

Fax 941.743.1384

## STATEMENT OF NO SUBMITTAL

If you **do not** intend to submit on this commodity/service, please return this form to the above address immediately. If this statement is not completed and returned, your company may be deleted from the Charlotte County Vendors' list for this commodity/service.

We, the undersigned, have declined to submit on requested commodity/service **RFP #20250502, ECONOMIC DEVELOPMENT MARKETING SERVICES – ANNUAL CONTRACT**, for the following reason(s):

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

\_\_\_\_\_ Insufficient time to respond to the Request for Proposal.

\_\_\_\_\_ We do not offer this product or service.

\_\_\_\_\_ Our schedule would not permit us to perform.

\_\_\_\_\_ Unable to meet bond/insurance requirements.

\_\_\_\_\_ Unable to meet specifications.

\_\_\_\_\_ Specifications are unclear (explain below).

\_\_\_\_\_ Remove us from your vendors' list for this commodity/service.

\_\_\_\_\_ Other (specify below).

Remarks: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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

Contact Person (typed or printed): \_\_\_\_\_

Contact Person Signature: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

E-Mail Address: \_\_\_\_\_

**Note:** Statement of No Submittal may be emailed to [Alisa.True@CharlotteCountyFL.gov](mailto:Alisa.True@CharlotteCountyFL.gov)

**TABLE OF CONTENTS**  
**ECONOMIC DEVELOPMENT MARKETING SERVICES – ANNUAL CONTRACT**  
**RFP NO. 20250502**

<b>Notice of Availability</b>	<b>1</b>
<b>"No Submittal" Response Page</b>	<b>2</b>
<b>Table of Contents</b>	<b>3</b>
 <b>PART I - GENERAL INSTRUCTIONS</b>	 <b>4 - 8</b>
 <b>PART II - SCOPE OF SERVICES</b>	 <b>9 - 10</b>
 <b>PART III - PROPOSAL FORMAT &amp; CRITERIA FOR AWARD</b>	 <b>11</b>
 <b>PART IV - SUBMITTAL FORMS</b>	 <b>12 - 14</b>

**REQUEST FOR PROPOSAL  
ECONOMIC DEVELOPMENT MARKETING SERVICES- ANNUAL CONTRACT  
RFP 20250502**

**PART I - INSTRUCTIONS**

**RP-01 INTENT:**

A. It is the intent of the County to select a firm who clearly demonstrates the highest level of ability and proven reliability to perform the professional services specified in the Scope of Services. Brief summaries applicable to the required work should be included with the proposal.

B. **Time and Date Due** - Charlotte County will accept proposals from individuals, corporations, partnerships, and other legal entities authorized to conduct business in the State of Florida until **3:00 p.m., JULY 29, 2025.**

**RP-02 CONTRACT AWARDS/TERM OF CONTRACT:** The County anticipates entering into a contract with one (1) firm who submits the proposal judged to be most advantageous to the County. The term of the contract will be effective from October 1, 2025 up to and including September 30, 2026 with option to renew for two (2) additional one-year terms. The selected firm shall be required to sign a formal agreement in the standard form currently used by Charlotte County for professional services.

The proposer understands that this RFP does not constitute an agreement or a contract with the proposer. A proposal is not binding until proposals are reviewed and accepted by the Board of County Commissioners and a contract is executed by both parties.

**RP-03 DEVELOPMENT COSTS:** The County shall not be liable for any expense incurred in connection with preparation of a response to this Request for Proposal (RFP). Proposers should prepare a straightforward and concise description of the proposers' ability to meet the requirements of the RFP.

**RP-04 INQUIRIES:** The County will not respond to oral inquiries. Proposers may submit written or emailed inquiries regarding this RFP to Purchasing, 18500 Murdock Circle, Suite 344, Port Charlotte, Florida 33948 or [Alisa.True@CharlotteCountyFl.gov](mailto:Alisa.True@CharlotteCountyFl.gov). The County will respond to written or emailed inquiries received at least five (5) calendar days prior to the RFP due date.

The County will record its responses to inquiries and any supplemental instructions in the form of written addenda. It shall be the responsibility of the proposer, prior to submitting their proposals, to view the website <https://purchasingbids.charlottecountyfl.gov> to determine if addenda were issued, acknowledging and incorporating them into their proposal.

**RP-05 PROPOSAL SUBMISSION AND WITHDRAWAL:** The County will receive proposals electronically. Please visit <http://bit.ly/3TYAyKa> and follow given instructions.

Proposals received after the established deadline will not be opened. Proposers may withdraw their proposal by notifying the County in writing at any time prior to the due date. Proposals not so withdrawn shall, upon opening, constitute an irrevocable offer for a period of 120 days to provide Charlotte County the services set forth in these specifications until one of the proposals has been accepted by the Board of County Commissioners. Upon opening, proposals become "public records" and shall be subject to public disclosure in accordance with Chapter 119, Florida Statutes.

**RP-06 PROPOSAL RESTRICTIONS:** In accordance with Ordinance #96-002, the manufacture, use, display or other employment of any facsimile or reproduction of the Charlotte County Seal, without the express, prior, written approval of the Board of County Commissioners of Charlotte County, Florida, is hereby declared to be unlawful and punishable as a Second Degree Misdemeanor as provided in Section 165.043, Florida Statutes.

**RP-07 DRUG FREE WORKPLACE:** Charlotte County is a Drug Free Workplace. It is strongly suggested that the attached Drug Free Workplace Form be signed and returned to this office with the proposal.

**RP-08 PUBLIC ENTITY CRIMES STATEMENT:** In accordance with Florida Statutes Sec. 287.133(2)(a), "A person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a bid on a contract to provide any goods/services to a public entity, may not submit a bid on a contract with a public entity for construction or repair of a public building or public work, may not submit bids on leases of real property to a public entity, may not be awarded or perform work as a Contractor, supplier, subcontractor, or consultant under a contract with any public entity, and may not transact business with any public entity in excess of the threshold amount provided in Section 287.017, for Category Two, for a period of 36 months from the date of being placed on the convicted vendor list".

**RP-09 CANCELLATION/TERMINATION:** The County shall have the right to unilaterally cancel, terminate or suspend this Contract, in whole or in part, by providing the successful proposer thirty (30) days written notice by certified mail.

It is expressly understood by the County and the Contractor that funding for any successive fiscal years is contingent upon appropriation of monies by the Board of County Commissioners. In the event funds are not available or not appropriated, the County reserves the right to terminate the Contract and/or individual leases. The County will be responsible for any outstanding invoices prior to the termination.

**RP-10 RESERVED RIGHTS:** The County reserves the right to accept or reject any and/or all proposals, to waive irregularities and technicalities, and to request resubmission. Any sole response received the first submission date may or may not be rejected by the County, depending on available competition and timely needs of the County. The County shall be the sole judge of the proposal and the resulting agreement that is in its best interest, and its decision shall be final.

The County reserves the right to accept or reject any or any part of the submissions, if it is deemed in the best interest of the County. The County, in its sole discretion, may expand the scope of work to include additional requirements. The County reserves the right to investigate as it deems necessary to determine the ability of any firm to perform the work or services requested. The firms, upon request shall provide information the County deems necessary in order to make a determination.

**RP-11 EQUAL EMPLOYMENT OPPORTUNITY CLAUSE:** Charlotte County, Florida, in accordance with the provisions of Title VII of The Civil Rights Act of 1964 (78 Stat. 252) and the Regulations of the Department of Commerce (15 CFR, Part 8) issued pursuant to such Act, hereby notifies all firms it will affirmatively ensure in any contract entered into pursuant to this advertisement, women-owned and minority business enterprises (collectively MBEs) will be afforded full opportunity to submit proposals in response to this advertisement and will not be discriminated against on the grounds of gender, race, color or national origin in consideration for an award. The County will consider the firm's status as an MBE or a certified MBE, and also the status of any sub-contractors or sub-consultants proposed to be utilized by the firm, within the evaluation process. Interested MBEs and certified MBEs are encouraged to respond.

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

No person shall, on the grounds of race, color, sex, religion, age, disability, national origin or marital status, be excluded from participation in, be denied the benefits of, or be otherwise subjected to discrimination under any program, activity or service funded through this Contract.

- Contractor will not discriminate against any employee or applicant for employment because of race, color, religion, sex, age, disability, national origin or marital status. Contractor agrees to post in a conspicuous place, available to employees and applicants for employment, notices setting forth the provisions of this non-discrimination clause.
- Contractor will, in all solicitations or advertisements regarding program activities, services provided or applications for employment, state that all qualified applicants will receive consideration for services or employment without regard to race, color, religion, sex, age, disability, national origin or marital status.
- County may require Contractor to submit reports as may be necessary to indicate non-discrimination. County officials will be permitted access to Contractor's books, records, accounts and other sources of information and its facilities as may be pertinent to ascertain compliance with non-discrimination laws.

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

**RP-12 PAYMENT:** Request for payment must be submitted to Charlotte County Purchasing on a form approved by the County in accordance with contract documents. Price shall be net and all invoices payable according to the Local Government Prompt Payment Act (F.S.218.74).

**RP-13 PERFORMANCE EVALUATION:** At the end of the Contract, the receiving department will evaluate the successful proposers' performance. This evaluation will become public record.

**RP-14 INSURANCE REQUIREMENTS:** Contractor and subcontractors shall procure and maintain until all of their obligations have been discharged, including any warranty periods under this Contract are satisfied, insurance against claims for injury to persons or damage to property which may arise from or in connection with the performance of the work hereunder by the Contractor, his agents, representatives, employees or subcontractors.

The insurance requirements herein are minimum requirements for this Contract and in no way limit the indemnity covenants contained in this Contract. The County in no way warrants that the minimum limits contained herein are sufficient to protect the Contractor from liabilities that might arise out of the performance of the work under this Contract by the Contractor, his agents, representatives, employees, or subcontractors. Contractor is free to purchase such additional insurance as may be determined necessary.

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

1. **Commercial General Liability – Occurrence Form (CG 00 01)**

Policy shall include bodily injury, property damage, broad form contractual liability and Explosion, Collapse and Underground (XCU) coverage.

- General Aggregate \$2,000,000
- Each Occurrence \$1,000,000

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

2. **Automobile Liability**

Bodily injury and property damage for any owned, hired, and non-owned vehicles used in the performance of this Contract. Automobile liability must be written on a standard ISO form (CA 00 01) covering any auto (Code 1), or if Contractor has no owned autos, hired (Code 8) and non-owned (Code 9) autos.

Combined Single Limit (CSL) \$1,000,000

- a. The policy shall be endorsed to include the following additional insured language: "Charlotte County a political subdivision of the state of Florida and its officers, employees, agents and volunteers" shall be named as an additional insured with respect to liability arising out of the activities performed by, or on behalf of the Contractor, including automobiles owned, leased, hired or borrowed by the Contractor".
- b. Contractor's sub-contractors shall be subject to the same minimum requirements identified in this section.
- c. Policy shall contain a waiver of subrogation against the Charlotte County.

3. **Worker's Compensation and Employers' Liability**

Workers' Compensation	Statutory
Employers' Liability	
Each Accident, bodily injury or disease	\$1,000,000

- a. Policy shall contain a waiver of subrogation against the Charlotte County.
- b. Contractor's sub-contractors shall be subject to the same minimum requirements identified in this section.
- c. If the contractor has no employees the contractor must submit to the County the Workers Compensation Exemption from the State of Florida.

4. **Professional Liability (Errors and Omissions Liability) for Prime Contractors**

- a. Estimated Projection Construction Cost up to **\$9,999,999**

Each Claim	\$1,000,000
Annual Aggregate	\$2,000,000
- b. Estimated Projection Construction Cost from **\$10,000,000 to \$19,999,999**

Each Claim	\$2,000,000
Annual Aggregate	\$2,000,000
- c. Estimated Projection Construction Cost from **\$20,000,000 to \$40,000,000**

Each Claim	\$3,000,000
Annual Aggregate	\$3,000,000

- d. In the event that any professional liability insurance required by this Contract is written on a claims-made basis, Contractor warrants that any retroactive date under the policy shall precede the effective date of this Contract; and that either continuous coverage will be maintained or an extended discovery period will be exercised for a period of five (5) years beginning at the time work under this Contract is completed.
- e. Policy shall contain a waiver of subrogation against Charlotte County.

**5. Professional Liability (Errors and Omissions Liability) for Subcontractors**

In addition to the insurance requirements for the Contractor, the contractor's registered sub-contractors (including structural, civil, mechanical, plumbing, electrical engineering, landscape architecture, survey, geotechnical and materials testing) are required to carry Professional Liability insurance at the same levels and conditions as the Contractor.

**Additional Insured** – All policies, **except** for the Workers Compensation and Professional Liability shall contain endorsements naming the County its officers, employees, agents and volunteers as additional insured with respect to liabilities arising out of the performance of services contained herein. The additional insured endorsements shall not limit the scope of coverage for the County to vicarious liability but shall allow coverage for the County to full extent provided by the policy, even if those limits exceed those required by this contract. Such additional insured coverage shall be at least as broad as Additional Insured (Form B) endorsement form ISO, CG 20 10 11 85 or both CG 20 10 and CG 20 37 if later revisions used.

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

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

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

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

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

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

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

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

Any failure, actual, or alleged, on part of the County to monitor or enforce compliance with any of the insurance and indemnification requirements will not be deemed as a waiver of any rights on the part to the County.

**RP-15 UNAUTHORIZED ALIEN WORKERS:** Charlotte County will not intentionally award publicly-funded contracts to any contractor who knowingly employs unauthorized alien workers, constituting a violation of the employment provisions contained in 8 U.S.C. Section 1324a [Section 274A of the Immigration and Nationality Act ("INA")]. The County shall consider employment by any Contractor of unauthorized aliens a violation of Section 274A of the INA. Such violation by the Contractor of the employment provisions contained in Section 274A of the INA shall be grounds for termination of this Agreement by the County. In addition, pursuant to Section 448.095 of the Florida Statutes, all persons or firms entering into contracts with Charlotte County are required to register with, and use, the E-Verify system of the U.S. Department of Homeland Security to electronically verify the employment eligibility of all newly hired employees. The County may terminate this Agreement for failure on the part of the Contractor to use E-Verify. Contract termination for failure to use E-Verify is not considered a breach of contract pursuant to s. 448.095(2)(c)3, *Fla. Stat.*

**RP-16 EMPLOYEE BACKGROUND CHECK:** If an owner, except a stockholder in a publicly traded corporation, or an employee of the Contractor has been convicted of any offenses requiring registration as a sexual offender or sexual predator, regardless of the location of conviction, the Contractor shall ensure that the offender's or predator's work on the project is consistent with the terms of his probation and registry requirements.

**RP-17 PUBLIC RECORDS CLAUSE TO CONTRACTORS "ACTING ON BEHALF OF THE COUNTY":** Pursuant to Section 119.0701 of the Florida Statutes, Contractors acting on behalf of the County must comply with the public records laws, specifically: a) keep and maintain public records required by the County to perform the contracted services; b) upon request from the County's custodian of public records, provide the County with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided in Chapter 119 of the Florida Statutes or as otherwise provided by law; c) ensure that public records that are exempt or confidential from public records disclosure requirements are not disclosed except as authorized by law for the duration of the contract term and following completion of the contract; and d) upon completion of the contract, keep and maintain all public records required by the County to perform the service, and meet all applicable requirements for retaining public records.

**IF THE CONTRACTOR HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE CONTRACTOR'S DUTY TO RETAIN AND PROVIDE PUBLIC RECORDS RELATING TO THIS CONTRACT, CONTACT THE COUNTY'S CUSTODIAN OF PUBLIC RECORDS AT (941) 743-1441, E-MAIL TO RECORDS@CHARLOTTECOUNTYFL.GOV, 18500 MURDOCK CIRCLE, BLDG. B, Suite 109, PORT CHARLOTTE, FLORIDA 33948.**

**RP-18 SOCIAL, POLITICAL, OR IDEOLOGICAL INTERESTS:** Charlotte County will not request documentation of, or consider a vendor's social, political, or ideological interests when determining if the vendor is a responsible vendor. Charlotte County does not give preference to vendors based on social, political, or ideological interests.

**END OF PART I**

## PART II SCOPE OF SERVICES

**RP-19 INTENT:** This is for an annual contract with a full-service economic development marketing firm that can provide strategic planning as well as develop and execute marketing initiatives targeted to business and industries considering expansions and relocations, commercial developers, and key audiences in an effort to support the Charlotte County Economic Development (hereinafter County) mission. The budget shall not exceed \$99,000 per year and will be in effect for Fiscal Year 25/26 (October 1, 2025 through September 30, 2026). Media buys are not included within the budget amount.

The intent of the County is to contract with a full-service economic development marketing firm to become a proactive partner with the County in working to increase awareness of Charlotte County within the U.S. and internationally, and to promote the area as a premier location to potential businesses and industries seeking to relocate or expand their operations. In addition, awarded firm will assist County with other marketing initiatives.

The County will accept proposals from any firm that complies with all requirements of the Request for Proposals. Marketing meetings can be conducted via video calls with the awarded vendor, tasks related to the RFP can be performed outside of the USA, but we *cannot* guarantee that there will not be travel required prior to award.

The County is working with multiple development entities looking at investing tens, if not hundreds, of millions of dollars into Charlotte County. In an effort to nurture existing development and entice future development, the County will engage the awarded firm in a multitude of marketing endeavors.

The goal of this contract shall be to create a working relationship with an established marketing firm with proven Economic Development experience that can help successfully market the County as needed.

If the County determines that the firm's performance has been such that these goals have not been met or may not be achieved, the County shall have the right to terminate the Contract.

**RP-20 BACKGROUND:** The Charlotte County Economic Development Office is responsible for the recruitment and retention of business and industry in the County, identifying strategic targeted industries, identify County and regional assets, development, and implementation of marketing strategies on a local, regional, national, and international basis.

**RP-21 SCOPE OF SERVICES:** Under the direction of the Director of the Economic Development Office, awarded firm shall provide as specified below, including the production of print advertising and collateral materials as well as other tasks including, but not limited to, the following:

- Building awareness, promote and help successfully sell Charlotte County and its many assets to site selectors, industries, commercial developers, and retailers through targeted lead generation campaigns.
- Provide services for website design, service, and monitoring, such as updating our existing website and creating landing pages as needed for various promotions and campaigns.
- Provide services including visioning, marketing, and work plans by utilizing **marketing strategies and strategic plans**.
- Help to push new ideas and marketing campaigns that will help sell the ever-changing "Vision" of Charlotte County. This may include 3-D animation in videos or presentations
- Provide services that includes videography, panoramic photography, still photography, and complete video production capabilities depending on what the marketing initiatives are for the year. We utilize short videos to grab the target's attention.
- Providing services including interactive asset maps, keynote presentations, and lead capture and enhanced analytics. Our office works off of a total budgeted number that determines the allocation of work product throughout the fiscal year as needed. The office currently has a HubSpot marketing subscription.
- Provide creative services such as copy writing and design services as it relates to print development, ad development, social media ad development, direct mail development, and point of sale. The marketing initiatives for the year and how the annual contract is allocated will determine how much of this is needed. We also have a monthly newsletter which is handled by County staff.
- Provide support to the County in future marketing initiatives that have yet to be determined. The County aims to "break the mold" in economic development marketing and the marketing firm awarded this contract should assist with creative production, copy, visuals and new initiatives.

We have a GIS real estate database currently on our website.

**RP-22 REQUIREMENTS:** The firm selected must be a marketing agency experienced in economic development with in-house capabilities to create and produce items outlined under RP-19 INTENT. Interested agencies must be able to demonstrate measurable success with previous economic development marketing campaigns.

The County shall retain all rights of use and ownership to any and all creative concepts, advertising materials, databases, and other creative print or electronic products produced by the selected firm.

The County shall have the right of final review and approval of all creative concepts, materials or other creative print or electronic products produced by the firm in relation to this RFP.

Firms are to submit the following information:

A. **Corporate Background**

- Company name, corporate headquarters address, phone, fax, company website, branch office locations, if applicable
- Key contact: name, address, phone, fax, email
- List firm's ownership, date established
- Firm's Federal Employer's Identification Number (FEIN), or for any individual, a Social Security Number (SSN)

B. **Corporate and Economic Development Experience**

- The firm shall have a minimum of five (5) years acceptable and verifiable marketing experience
- Provide details of corporate experiences within the last five (5) years relevant to goals and services requested in this RFP
- Focused specialty and working knowledge of the economic development process, with a minimum of five (5) years' experience working with clients
- Experience of the firm and the dedicated account team
- Total number of employees
- Include only the specific experience of the firm and account team, not all firm employees past experiences
- List 3-5 current economic development clients that best match the criteria we are seeking, including the year service started
- List all clients added and lost in the past three (3) years and give a brief description of why they were lost

C. **References** - The firm shall furnish at least three (3) current Economic Development-related references with their submittal that have been in effect for at least six (6) months. The reference shall include the company name, contact person, and telephone number. The reference shall describe where services are similar in magnitude and scope to those requested in this RFP. The County reserves the right to contact these references' and any other references not listed in the RFP.

D. **Supporting Materials** – Provide examples that your company has produced that are similar in scope to those required in this RFP. Additional creative submission is at the discretion of the firm.

E. **Agency Case Summary** – Provide a brief summary on why firm is uniquely qualified to be the marketing communications agency of record for the County.

F. **Personnel** – Please identify the person or persons who will be primarily responsible for the County account along with titles and biography.

G. **Public Presentation** - At this time the County does not anticipate requiring public presentations; however, the County reserves the right to request a presentation if it becomes necessary.

H. **Cost and Price Analysis** – This information is required to determine the method by which you derive your costs charged to the County. Provide a brief description of your standard billing policies, commissions, hourly rates or single blended hourly rate, if applicable as well as and proposed cost structure options for this account.

I. **Account Compatibility Disclosure** - The firm shall reveal the name(s) of any other client or clients it is actively representing, has represented, and reasonably expects to represent which:

- Engages in any phase of economic development
- Is involved in any service, product, or activity directly involving the State of Florida or other states or counties
- Any other reason known to the firm, which should be revealed prior to contract negotiations.

**END OF PART II**

**PART III  
PROPOSAL FORMAT & EVALUATION METHOD**

**RP-23 RULES FOR PROPOSALS:**

A. The proposal must name all persons or entities interested in the proposals as principals. The proposal must declare that it is made without collusion with any other person or entity submitting a proposal pursuant to this RFP.

B. The following is an excerpt from Charlotte County Resolution #2011-221 and applies to this proposal: **"Any questions regarding a project or submittal shall be directed to the designated person in the Purchasing Division for a response. From the time the notice of request for proposals is published until the contract is awarded, there shall not be any contact between a proposer, agent or other representative and any member of the selection committee, user department, Administration, or any member of the Board of County Commissioners regarding the project or proposal submitted by any proposer. Should any member of the selection committee initiate contact or fail to report any contact, such committee member may be subject to disciplinary action up to and including dismissal. If any proposer, agent or other representative contacts any committee member, user department, Administration or member of the Board of County Commissioners regarding a request for proposals or submitted proposal, the proposer is subject to sanctions up to and including having the County disqualify the firm's submittal."**

C. For your information, the members of the Professional Services Committee for this project are as follows:

Kay Tracy, Economic Development Director  
Sean Doherty, Tourism Development Director  
Maureen Broderick, Recreation Manager – Community Services

**RP-24 PROPOSAL FORMAT:** Firms shall prepare their proposals using the format outlined in RP-25 Evaluation Method and Criteria. In addition to the information required in the Evaluation Method and Criteria, the information requested under RP-22 Requirements shall be required.

Proposals are to be typed on the firm's letterhead, specifically referring to the project and the scope of services, containing all required information. That information is to be submitted electronically. Please visit <http://bit.ly/3TYAyKa> and follow given instructions.

**RP-25 EVALUATION METHOD AND CRITERIA:** Award of this RFP shall be based on the following:

EVALUATION CRITERIA	MAXIMUM POINTS
A. Economic Development Marketing – understanding of the economic development process and to include case histories.	35
B. Experience - Experience with economic development related marketing; samples of work created for economic development; account team experience; and experience related to the goals & services of the RFP.	35
C. Economic Development Awards Received - for economic development marketing.	15
D. Cost & Price Analysis – fees and fee structure.	15

Selection - The Professional Services Committee shall evaluate the proposals submitted. A short list of firms from proposals will be ranked in order. Final approval will be by the Board of County Commissioners who may request public presentation.

**RP-26 ANTICIPATED SCHEDULE:** The projected schedule of events for this proposal is as follows:

07-02-25 County advertises for proposals  
07-29-25 Proposal due date  
08-13-25 Professional Services Committee short lists firms

**END OF PART III**

#### PART IV - SUBMITTAL SIGNATURE FORM

The undersigned attests to his/her authority to submit this proposal and to bind the firm herein named to perform as per contract, if the firm is awarded the Contract by the County. The undersigned further certifies that he/she has read the Request for Proposal, Terms and Conditions, Insurance Requirements and any other documentation relating to this request and this proposal is submitted with full knowledge and understanding of the requirements and time constraints noted herein.

By signing this form, the proposer hereby declares that this proposal is made without collusion with any other person or entity submitting a proposal pursuant to this RFP.

In accordance with section 287.135, Florida Statutes, the undersigned certifies that the company is not on the Scrutinized Companies with Activities in Sudan List, the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, and does not have business operations in Cuba or Syria (if applicable) or the Scrutinized Companies that Boycott Israel List, or is not participating in a boycott of Israel.

As Addenda are considered binding as if contained in the original specifications, it is critical that the Consultant acknowledge receipt of same. The submittal may be considered void if receipt of an addendum is not acknowledged.

Addendum No.\_\_\_\_ Dated\_\_\_\_      Addendum No.\_\_\_\_ Dated\_\_\_\_      Addendum No.\_\_\_\_ Dated\_\_\_\_  
Addendum No.\_\_\_\_ Dated\_\_\_\_      Addendum No.\_\_\_\_ Dated\_\_\_\_      Addendum No.\_\_\_\_ Dated\_\_\_\_

Type of Organization (please check one):      INDIVIDUAL      ( )      PARTNERSHIP      ( )  
CORPORATION      ( )      JOINT VENTURE      ( )

\_\_\_\_\_  
Firm Name

\_\_\_\_\_  
Telephone

\_\_\_\_\_  
Fictitious or d/b/a Name

\_\_\_\_\_  
Federal Employer Identification Number (FEIN)

\_\_\_\_\_  
Home Office Address

\_\_\_\_\_  
City, State, Zip

\_\_\_\_\_  
Number of Years in Business

\_\_\_\_\_  
Address: Office Servicing Charlotte County, other than above

\_\_\_\_\_  
Name/Title of your Charlotte County Rep.

\_\_\_\_\_  
Telephone

\_\_\_\_\_  
Name/Title of Individual Binding Firm (Please Print)

\_\_\_\_\_  
Signature of Individual Binding Firm

\_\_\_\_\_  
Date

\_\_\_\_\_  
Email Address

**(This form must be completed & returned)**

## DRUG FREE WORKPLACE FORM

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

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

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

\_\_\_\_\_  
Proposer's Signature

\_\_\_\_\_  
Date

NAME OF FIRM \_\_\_\_\_  
(This form must be completed and returned)

**HUMAN TRAFFICKING AFFIDAVIT  
for Nongovernmental Entities Pursuant To FS. §787.06**

**Charlotte County Contract #20250502**

The undersigned on behalf of the entity listed below, (the "Nongovernmental Entity"), hereby attests under penalty of perjury as follows:

1. I am over the age of 18 and I have personal knowledge of the matters set forth except as otherwise set forth herein.
2. I am an officer or representative of the Nongovernmental Entity and authorized to provide this affidavit on the Company's behalf.
3. Nongovernmental Entity does not use coercion for labor or services as defined in Section 787.06, Florida Statutes.
4. This declaration is made pursuant to Section 92.525, Florida Statutes. I understand that making a false statement in this declaration may subject me to criminal penalties.

Under penalties of perjury, I declare that I have read the foregoing Human Trafficking Affidavit and that the facts stated in it are true.

Further Affiant sayeth naught.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Nongovernmental Entity

\_\_\_\_\_  
Date

**END OF PART IV**

**NAME OF FIRM** \_\_\_\_\_  
(This form must be completed and returned)