

**Bid Tabulation Packet  
for  
Solicitation GEN2116476P1**

**Advertising Agency Services**

**Bid Designation: Public**



**Broward County Board of County Commissioners**

**Bid #GEN2116476P1 - Advertising Agency Services**

Creation Date Jan 28, 2019

End Date Mar 20, 2019 5:00:00 PM EDT

Start Date Feb 1, 2019 3:25:33 PM EST

Awarded Date Not Yet Awarded

GEN2116476P1--01-01 Flat Fee Services - Year 1					
Supplier	Unit Price	Qty/Unit	Total Price	Attch.	Docs
Zimmerman Agency [Ad]	First Offer - \$74,689.00	12 / month	\$896,268.00	Y	Y
Product Code: Agency Notes:		Supplier Product Code: Supplier Notes: Unit price is monthly fee			
Cactus Marketing Communications	First Offer - \$80,000.00	12 / month	\$960,000.00	Y	Y
Product Code: Agency Notes:		Supplier Product Code: Supplier Notes: Proposed monthly fee (Flat Fee Services) including all creative development fees, project management, copy writing, digital media and content strategy, media buying, etc. Total Annual Hours: 6,898 Total Monthly Hours: 575			
MMGY Global	First Offer - \$83,245.00	12 / month	\$998,940.00	Y	Y
Product Code: Agency Notes:		Supplier Product Code: GEN2116476P1--01-01 Supplier Notes: MMGY Global's submission covers years 1, 2 and 3 of the stated contract.			
Metropolitan Public Strategies	First Offer - \$99,083.00	12 / month	\$1,188,996.00	Y	Y
Product Code: Agency Notes:		Supplier Product Code: Supplier Notes:			
&Barr	First Offer - \$99,500.00	12 / month	\$1,194,000.00	Y	Y
Product Code: Agency Notes:		Supplier Product Code: Supplier Notes:			
PPK	First Offer - \$103,335.00	12 / month	\$1,240,020.00	Y	Y
Product Code: Agency Notes:		Supplier Product Code: Supplier Notes:			
Aqua [Ad]	First Offer - \$123,916.00	12 / month	\$1,486,992.00	Y	Y
Product Code: Agency Notes:		Supplier Product Code: Supplier Notes:			
Starmark	First Offer - \$147,940.00	12 / month	\$1,775,280.00	Y	Y
Product Code: Agency Notes:		Supplier Product Code: Supplier Notes: See PDF for Evaluation Criteria See Excel Sheet for Pricing Support			
Fuseideas	First Offer - \$161,667.00	12 / month	\$1,940,004.00	Y	Y
Product Code: Agency Notes:		Supplier Product Code: Supplier Notes: Please see Fuseideas' uploaded response document for Pricing Support detail.			

Relebrand	First Offer - \$200,000.00	12 / month	\$2,400,000.00	Y	Y
<b>Product Code:</b> <b>Agency Notes:</b>		<b>Supplier Product Code:</b> <b>Supplier Notes:</b>			
Pace Communications Group, Inc.	First Offer - \$231,450.00	12 / month	\$2,777,400.00	Y	Y
<b>Product Code:</b> <b>Agency Notes:</b>		<b>Supplier Product Code:</b> <b>Supplier Notes:</b> All forms in the documents section have been filled out and accepted within that designated area. All additional required forms or forms from the document section that required further action are included as uploads in this section. Our presentation for evaluation criteria is also included in as an upload in this section.			
ModOp	First Offer - \$264,148.00	12 / month	\$3,169,776.00	Y	Y
<b>Product Code:</b> <b>Agency Notes:</b>		<b>Supplier Product Code:</b> <b>Supplier Notes:</b> The attached monthly flat fee pricing is based on the services to be provided by our team members as well as estimated costs of all annual deliverables. This pricing does not include Optional Services such as initial Brand Strategy and Positioning or Website/APP design and development.			
Nobox Marketing	First Offer - \$268,197.00	12 / month	\$3,218,364.00	Y	Y
<b>Product Code:</b> <b>Agency Notes:</b>		<b>Supplier Product Code:</b> <b>Supplier Notes:</b>			
BVK	First Offer - \$291,666.66	12 / month	\$3,499,999.92	Y	Y
<b>Product Code:</b> <b>Agency Notes:</b>		<b>Supplier Product Code:</b> <b>Supplier Notes:</b>			
Paradise Advertising	First Offer - \$291,666.66	12 / month	\$3,499,999.92	Y	Y
<b>Product Code:</b> <b>Agency Notes:</b>		<b>Supplier Product Code:</b> <b>Supplier Notes:</b>			
Lightship Studios	First Offer - \$660,475.00	12 / month	\$7,925,700.00	Y	Y
<b>Product Code:</b> <b>Agency Notes:</b>		<b>Supplier Product Code:</b> <b>Supplier Notes:</b>			

GEN2116476P1--01-02 Flat Fee Services - Year 2					
Supplier	Unit Price	Qty/Unit	Total Price	Attch.	Docs
Cactus Marketing Communications	First Offer - \$70,000.00	12 / month	\$840,000.00		Y
<b>Product Code:</b> <b>Agency Notes:</b>		<b>Supplier Product Code:</b> <b>Supplier Notes:</b> Total Annual Hours: 6,022 Total Monthly Hours: 502			
Zimmerman Agency [Ad]	First Offer - \$74,689.00	12 / month	\$896,268.00		Y
<b>Product Code:</b> <b>Agency Notes:</b>		<b>Supplier Product Code:</b> <b>Supplier Notes:</b> Unit price is monthly fee			


MMGY Global	First Offer - \$75,712.00	12 / month	\$908,544.00	Y	Y
Product Code: Agency Notes:		Supplier Product Code: GEN2116476P1--01-02 Supplier Notes: MMGY Global's submission covers years 1, 2 and 3 of the stated contract.			
Metropolitan Public Strategies	First Offer - \$99,083.00	12 / month	\$1,188,996.00		Y
Product Code: Agency Notes:		Supplier Product Code: Supplier Notes:			
&Barr	First Offer - \$102,485.00	12 / month	\$1,229,820.00		Y
Product Code: Agency Notes:		Supplier Product Code: Supplier Notes:			
Aqua [Ad]	First Offer - \$102,850.00	12 / month	\$1,234,200.00	Y	Y
Product Code: Agency Notes:		Supplier Product Code: Supplier Notes:			
PPK	First Offer - \$106,435.00	12 / month	\$1,277,220.00		Y
Product Code: Agency Notes:		Supplier Product Code: Supplier Notes:			
Starmark	First Offer - \$147,940.00	12 / month	\$1,775,280.00	Y	Y
Product Code: Agency Notes:		Supplier Product Code: Supplier Notes: See PDF for Evaluation Criteria See Excel Sheet for Pricing Support			
Fuseideas	First Offer - \$161,667.00	12 / month	\$1,940,004.00		Y
Product Code: Agency Notes:		Supplier Product Code: Supplier Notes:			
Relebrand	First Offer - \$170,000.00	12 / month	\$2,040,000.00	Y	Y
Product Code: Agency Notes:		Supplier Product Code: Supplier Notes:			
Pace Communications Group, Inc.	First Offer - \$231,450.00	12 / month	\$2,777,400.00		Y
Product Code: Agency Notes:		Supplier Product Code: Supplier Notes:			
ModOp	First Offer - \$263,440.00	12 / month	\$3,161,280.00		Y
Product Code: Agency Notes:		Supplier Product Code: Supplier Notes: We have used estimates based on expected deliverables, increasing video production and digital experiences.			
Nobox Marketing	First Offer - \$268,197.00	12 / month	\$3,218,364.00	Y	Y
Product Code: Agency Notes:		Supplier Product Code: Supplier Notes:			
BVK	First Offer - \$291,666.66	12 / month	\$3,499,999.92		Y
Product Code: Agency Notes:		Supplier Product Code: Supplier Notes:			
Paradise Advertising	First Offer - \$291,666.66	12 / month	\$3,499,999.92	Y	Y
Product Code: Agency Notes:		Supplier Product Code: Supplier Notes:			
Lightship Studios	First Offer - \$644,758.00	12 / month	\$7,737,096.00		Y
Product Code: Agency Notes:		Supplier Product Code: Supplier Notes:			
GEN2116476P1--01-03 Flat Fee Services - Year 3					
Supplier	Unit Price	Qty/Unit	Total Price	Attch.	Docs





Cactus Marketing Communications	First Offer - \$70,000.00	12 / month	\$840,000.00		Y
<b>Product Code:</b> <b>Agency Notes:</b>		<b>Supplier Product Code:</b> <b>Supplier Notes:</b> Total Annual Hours: 6,022 Total Monthly Hours: 502			
Zimmerman Agency [Ad]	First Offer - \$74,689.00	12 / month	\$896,268.00		Y
<b>Product Code:</b> <b>Agency Notes:</b>		<b>Supplier Product Code:</b> <b>Supplier Notes:</b> Unit price is monthly fee			
MMGY Global	First Offer - \$75,712.00	12 / month	\$908,544.00	Y	Y
<b>Product Code:</b> <b>Agency Notes:</b>		<b>Supplier Product Code:</b> GEN2116476P1--01-03 <b>Supplier Notes:</b> MMGY Global's submission covers years 1, 2 and 3 of the stated contract.			
Metropolitan Public Strategies	First Offer - \$99,083.00	12 / month	\$1,188,996.00		Y
<b>Product Code:</b> <b>Agency Notes:</b>		<b>Supplier Product Code:</b> <b>Supplier Notes:</b>			
Aqua [Ad]	First Offer - \$102,850.00	12 / month	\$1,234,200.00	Y	Y
<b>Product Code:</b> <b>Agency Notes:</b>		<b>Supplier Product Code:</b> <b>Supplier Notes:</b>			
&Barr	First Offer - \$105,560.00	12 / month	\$1,266,720.00		Y
<b>Product Code:</b> <b>Agency Notes:</b>		<b>Supplier Product Code:</b> <b>Supplier Notes:</b>			
PPK	First Offer - \$109,628.00	12 / month	\$1,315,536.00		Y
<b>Product Code:</b> <b>Agency Notes:</b>		<b>Supplier Product Code:</b> <b>Supplier Notes:</b>			
Starmark	First Offer - \$147,940.00	12 / month	\$1,775,280.00	Y	Y
<b>Product Code:</b> <b>Agency Notes:</b>		<b>Supplier Product Code:</b> <b>Supplier Notes:</b> See PDF for Evaluation Criteria See Excel Sheet for Pricing Support			
Fuseideas	First Offer - \$161,666.00	12 / month	\$1,939,992.00		Y
<b>Product Code:</b> <b>Agency Notes:</b>		<b>Supplier Product Code:</b> <b>Supplier Notes:</b>			
Relebrand	First Offer - \$170,000.00	12 / month	\$2,040,000.00	Y	Y
<b>Product Code:</b> <b>Agency Notes:</b>		<b>Supplier Product Code:</b> <b>Supplier Notes:</b>			
Pace Communications Group, Inc.	First Offer - \$231,450.00	12 / month	\$2,777,400.00		Y
<b>Product Code:</b> <b>Agency Notes:</b>		<b>Supplier Product Code:</b> <b>Supplier Notes:</b>			
ModOp	First Offer - \$262,440.00	12 / month	\$3,149,280.00		Y
<b>Product Code:</b> <b>Agency Notes:</b>		<b>Supplier Product Code:</b> <b>Supplier Notes:</b> We have used estimates based on expected deliverables, increasing video production and digital experiences.			
Nobox Marketing	First Offer - \$268,197.00	12 / month	\$3,218,364.00	Y	Y
<b>Product Code:</b> <b>Agency Notes:</b>		<b>Supplier Product Code:</b> <b>Supplier Notes:</b>			

BVK	First Offer - \$291,666.66	12 / month	\$3,499,999.92		Y
<b>Product Code:</b>		<b>Supplier Product Code:</b>			
<b>Agency Notes:</b>		<b>Supplier Notes:</b>			
Paradise Advertising	First Offer - \$291,666.66	12 / month	\$3,499,999.92	Y	Y
<b>Product Code:</b>		<b>Supplier Product Code:</b>			
<b>Agency Notes:</b>		<b>Supplier Notes:</b>			
Lightship Studios	First Offer - \$654,349.00	12 / month	\$7,852,188.00		Y
<b>Product Code:</b>		<b>Supplier Product Code:</b>			
<b>Agency Notes:</b>		<b>Supplier Notes:</b>			






**Supplier Totals**






f Cactus Marketing Communications		\$2,640,000.00 (3/3 items)	
Bid Contact	Kristen Taylor Smith kristen@cactusinc.com Ph 303-455-7545	Address	2128 15th. Street Denver, CO 80202
Bid Notes	Thank you, please enjoy!		
Agency Notes:		Supplier Notes:	Head Attch:
		Thank you, please enjoy!	

f Zimmerman Agency [Ad]		\$2,688,804.00 (3/3 items)	
Bid Contact	Angela Meredith ameredith@brightredagency.com Ph 850-668-2222	Address	TALLAHASSEE, FL 32308
Agency Notes:		Supplier Notes:	Head Attch:
			

f MMGY Global		\$2,816,028.00 (3/3 items)	
Bid Contact	Hawley Montgomery hmontgomery@mmgyglobal.com Ph 816-471-5988	Address	4601 Madison Avenue Kansas City, MO 64112
Bid Notes	Thank you for including MMGY Global in your RFP process. Our team is excited and ready to hit the ground running. We are confident that our industry knowledge and expertise in advertising agency services for travel and hospitality brands will make us an ideal partner for Greater Fort Lauderdale.  Our comprehensive proposal covers each year of the stated contract length and addresses the full scope of work. If you have any questions while reviewing please feel free to reach out to our team. Thank you again for the opportunity, we look forward to hearing from you!		
Agency Notes:		Supplier Notes:	Head Attch:
		Thank you for including MMGY Global in your RFP process. Our team is excited and ready to hit the ground running. We are confident that our industry knowledge and expertise in advertising agency services for travel and hospitality brands will make us an ideal partner for Greater Fort Lauderdale.  Our comprehensive proposal covers each year of the stated contract length and addresses the full scope of work. If you have any questions while reviewing please feel free to reach out to our team. Thank you again for the opportunity, we look forward to hearing from you!	

f Metropolitan Public Strategies		\$3,566,988.00 (3/3 items)	
Bid Contact	Jason Heard	Address	1677 Lexington Avenue 2nd Fl

jasonheard@gmail.com Ph 415-642-9970 New York, NY 10029		
Bid Notes	Please find attached the following items: * RFP Response * JV Agreement * CBE Letter of Intent * Workload history for MPS and SPARK * Vendor Reference forms for MPS and SPARK These documents apply to the entire bid.	
Agency Notes:	Supplier Notes: Please find attached the following items: * RFP Response * JV Agreement * CBE Letter of Intent * Workload history for MPS and SPARK * Vendor Reference forms for MPS and SPARK These documents apply to the entire bid.	Head Attch: 
f &Barr \$3,690,540.00 (3/3 items)		
Bid Contact	Douglas White douglas.white@andbarr.co Ph 407-758-6509	Address 600 E Washington Street Orlando, FL 32801
Agency Notes:	Supplier Notes:	Head Attch: 
f PPK \$3,832,776.00 (3/3 items)		
Bid Contact	tom kenney tkenney@uniteppk.com Ph 813-393-8564	Address 1102 N. Florida Ave. Tampa, FL 33602
Agency Notes:	Supplier Notes:	Head Attch: 
f Aqua [Ad] \$3,955,392.00 (3/3 items)		
Bid Contact	Dave DiMaggio NewBiz@welcometoaqua.com Ph 727-687-4670	Address SAINT PETERSBURG, FL 33701
Agency Notes:	Supplier Notes:	Head Attch: 
f Starmark \$5,325,840.00 (3/3 items)		
Bid Contact	Jacqui Hartnett lpunte@starmark.com Ph 954-874-9000	Address 210 S. Andrews Fort Lauderdale, FL 33301
Supplier Code	VC0000039094	
Agency Notes:	Supplier Notes:	Head Attch: 
f Fuseideas \$5,820,000.00 (3/3 items)		
Bid Contact	Dennis Franczak dfranczak@fuseideas.com Ph 617-776-5800 Fax 617-776-5821	Address 8 Winchester Place Suite 303 Winchester, MA 01890

Qualifications SB		
Agency Notes:	Supplier Notes:	Head Attch: 
f Relebrand \$6,480,000.00 (3/3 items)		
Bid Contact Roberto S Schaps roberto@relebrand.com Ph 305-476-3536	Address 800 Douglas Road La Puerta del Sol, Suite 230 Coral Gables, FL 33134	
Agency Notes:	Supplier Notes:	Head Attch: 
f Pace Communications Group, Inc. \$8,332,200.00 (3/3 items)		
Bid Contact Julie Bricker julie@paceadv.com Ph 561-931-2639	Address 7301 North Federal Highway Studio B Boca Raton, FL 33487	
Bid Notes All monthly flat fee pricing includes costs for agency time and production costs. The GFLCVB will not be billed for agency hours that are not utilized.		
Agency Notes:	Supplier Notes: All monthly flat fee pricing includes costs for agency time and production costs. The GFLCVB will not be billed for agency hours that are not utilized.	Head Attch: 
f ModOp \$9,480,336.00 (3/3 items)		
Bid Contact Nicole Taic nicole.taic@modop.com Ph 786-615-6720	Address 444 Brickell Ave Suite 900 Miami, FL 33131	
Bid Notes Please note: Under the Year 1 field, we attached our response that will cover all three years.		
Agency Notes:	Supplier Notes: Please note: Under the Year 1 field, we attached our response that will cover all three years.	Head Attch: 
f Nobox Marketing \$9,655,092.00 (3/3 items)		
Bid Contact Santiago Mas santiagomas@nobox.com Ph 786-427-5900	Address 3390 Mary Street MIAMI, FL 33129	
Bid Notes Hello GFLCVB team, Thank you for the opportunity to participate in this first round of the RFP! As South Florida locals and passionate advertising professionals, it would be an honor and a pleasure to work in partnership with you. After we got a positive response in the Q&A section, we decided to prepare a deck as our reply to the Evaluation points instead of a Word or Excel file, as we thought it would better illustrate our capabilities. The file is called: "NOBOX PROPOSAL I GFLCVB Bid #GEN2116476P1 - Advertising Agency Services.pdf" As requested in the Q&A section, we uploaded the Local Presence Form as one of the check boxes didn't exist in the digital form (BidSync). Looking forward to receiving your comments and next steps. Feel free to reach out with any questions or additional request. Warm Regards and Miles of Blessings, The Nobox Team.		
Agency Notes:	Supplier Notes: Hello GFLCVB team, Thank you for the opportunity to participate in this first	Head Attch: 

round of the RFP! As South Florida locals and passionate advertising professionals, it would be an honor and a pleasure to work in partnership with you. After we got a positive response in the Q&A section, we decided to prepare a deck as our reply to the Evaluation points instead of a Word or Excel file, as we thought it would better illustrate our capabilities. The file is called: "NOBOX PROPOSAL I GFLCVB Bid #GEN2116476P1 - Advertising Agency Services.pdf" As requested in the Q&A section, we uploaded the Local Presence Form as one of the check boxes didn't exist in the digital form (BidSync). Looking forward to receiving your comments and next steps. Feel free to reach out with any questions or additional request.

Warm Regards and Miles of Blessings,  
The Nobox Team.

f BVK		\$10,499,999.76 (3/3 items)
Bid Contact	Mary DeLong mary.delong@bvk.com Ph 813-251-0398	Address TAMPA, FL 33606
Agency Notes:	Supplier Notes:	Head Attch: 
f Paradise Advertising		\$10,499,999.76 (3/3 items)
Bid Contact	Rudy Webb rwebb@paradiseadv.com Ph 727-821-5155	Address Saint Petersburg, FL 33701
Agency Notes:	Supplier Notes:	Head Attch: 
f Lightship Studios		\$23,514,984.00 (3/3 items)
Bid Contact	Andrew Perrott andy@lightshipstudios.com Ph 954-621-1350	Address 4030 NE 6th Avenue Oakland Park, FL 33334
Qualifications	SB	
Agency Notes:	Supplier Notes:	Head Attch: 

\* \*

## Cactus Marketing Communications

Bid Contact **Kristen Taylor Smith**  
**kristen@cactusinc.com**  
**Ph 303-455-7545**

Address **2128 15th. Street**  
**Denver, CO 80202**

Bid Notes **Thank you, please enjoy!**

Item #	Line Item	Notes	Unit Price	Qty/Unit	Attch.	Docs
GEN2116476P1--01-01	Flat Fee Services - Year 1	<b>Supplier</b> <b>Product</b> <b>Code:</b> <b>Supplier</b> <b>Notes:</b> Proposed monthly fee (Flat Fee Services) including all creative development fees, project management, copy writing, digital media and content strategy, media buying, etc. Total Annual Hours: 6,898 Total Monthly Hours: 575	First Offer - \$80,000.00	12 / month \$960,000.00	Y	Y
GEN2116476P1--01-02	Flat Fee Services - Year 2	<b>Supplier</b> <b>Product</b> <b>Code:</b> <b>Supplier</b> <b>Notes:</b> Total Annual Hours: 6,022 Total Monthly Hours: 502	First Offer - \$70,000.00	12 / month \$840,000.00		Y
GEN2116476P1--01-03	Flat Fee Services - Year 3	<b>Supplier</b> <b>Product</b> <b>Code:</b> <b>Supplier</b> <b>Notes:</b> Total Annual Hours: 6,022 Total Monthly Hours: 502	First Offer - \$70,000.00	12 / month \$840,000.00		Y

Supplier Total \$2,640,000.00

**Cactus Marketing Communications**

Item: **Flat Fee Services - Year 1**

**Attachments**

Vendor\_Reference\_Verification\_Form,\_GEN2116476P1 CACU.pdf

Vendor\_Reference\_Verification\_Form,\_GEN2116476P1 Lottery.pdf

Vendor\_Reference\_Verification\_Form,\_GEN2116476P1 VLMD.pdf

Local Preference\_Tie Breaker Certification Form.pdf

Cactus\_Broward County Proposal.pdf



### **Vendor Reference Verification Form**

Vendor is required to submit completed Reference Verification Forms for previous projects referenced in its submittal. Vendor should provide the **Vendor Reference Verification Form** to its reference organization/firm to complete and return to the Vendor's attention. Vendor should submit the completed Vendor Reference Form with its response by the solicitation's deadline. The County will verify references provided as part of the review process. Provide a minimum of three (3) non-Broward County Board of County Commissioners' references.



## Vendor Reference Verification Form

Broward County Solicitation No. and Title:

Reference for:

Organization/Firm Name providing reference:

Contact Name:

Title:

Reference date:

Contact Email:

Contact Phone:

Name of Referenced Project:

Contract No.

Date Services Provided:

Project Amount:

to

Vendor's role in Project: Prime Vendor Subconsultant/Subcontractor

Would you use this vendor again? Yes No If No, please specify in Additional Comments (below).

### Description of services provided by Vendor:

**Please rate your experience with the referenced Vendor:**

**Needs  
Improvement**

**Satisfactory**

**Excellent**

**Not  
Applicable**

1. Vendor's Quality of Service
  - a. Responsive
  - b. Accuracy
  - c. Deliverables
2. Vendor's Organization:
  - a. Staff expertise
  - b. Professionalism
  - c. Turnover
3. Timeliness of:
  - a. Project
  - b. Deliverables
4. Project completed within budget
5. Cooperation with:
  - a. Your Firm
  - b. Subcontractor(s)/Subconsultant(s)
  - c. Regulatory Agency(ies)

**Additional Comments:** (provide on additional sheet if needed)

\*\*\*THIS SECTION FOR COUNTY USE ONLY\*\*\*

Verified via: ☐ EMAIL ☐ VERBAL Verified by: \_\_\_\_\_ Division: \_\_\_\_\_ Date: \_\_\_\_\_

### **Vendor Reference Verification Form**

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## Vendor Reference Verification Form

Broward County Solicitation No. and Title:

Reference for:

Organization/Firm Name providing reference:

Contact Name:

Title:

Reference date:

Contact Email:

Contact Phone:

Name of Referenced Project:

Contract No.

Date Services Provided:

Project Amount:

to

Vendor's role in Project: Prime Vendor Subconsultant/Subcontractor

Would you use this vendor again? Yes No If No, please specify in Additional Comments (below).

### Description of services provided by Vendor:

**Please rate your experience with the referenced Vendor:**

**Needs  
Improvement**

**Satisfactory**

**Excellent**

**Not  
Applicable**

1. Vendor's Quality of Service
  - a. Responsive
  - b. Accuracy
  - c. Deliverables
2. Vendor's Organization:
  - a. Staff expertise
  - b. Professionalism
  - c. Turnover
3. Timeliness of:
  - a. Project
  - b. Deliverables
4. Project completed within budget
5. Cooperation with:
  - a. Your Firm
  - b. Subcontractor(s)/Subconsultant(s)
  - c. Regulatory Agency(ies)

**Additional Comments:** (provide on additional sheet if needed)

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Verified via: ☐ EMAIL ☐ VERBAL Verified by: \_\_\_\_\_ Division: \_\_\_\_\_ Date: \_\_\_\_\_

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## Vendor Reference Verification Form

Broward County Solicitation No. and Title:

Reference for:

Organization/Firm Name providing reference:

Contact Name:

Title:

Reference date:

Contact Email:

Contact Phone:

Name of Referenced Project:

Contract No.

Date Services Provided:

Project Amount:

to

Vendor's role in Project: Prime Vendor Subconsultant/Subcontractor

Would you use this vendor again? Yes No If No, please specify in Additional Comments (below).

### Description of services provided by Vendor:

**Please rate your experience with the referenced Vendor:**

**Needs  
Improvement**

**Satisfactory**

**Excellent**

**Not  
Applicable**

1. Vendor's Quality of Service
  - a. Responsive
  - b. Accuracy
  - c. Deliverables
2. Vendor's Organization:
  - a. Staff expertise
  - b. Professionalism
  - c. Turnover
3. Timeliness of:
  - a. Project
  - b. Deliverables
4. Project completed within budget
5. Cooperation with:
  - a. Your Firm
  - b. Subcontractor(s)/Subconsultant(s)
  - c. Regulatory Agency(ies)

**Additional Comments:** (provide on additional sheet if needed)

\*\*\*THIS SECTION FOR COUNTY USE ONLY\*\*\*

Verified via: ☐ EMAIL ☐ VERBAL Verified by: \_\_\_\_\_ Division: \_\_\_\_\_ Date: \_\_\_\_\_

**RFP-RLI-RFQ LOCAL PREFERENCE AND TIE BREAKER CERTIFICATION FORM**

The completed and signed form should be returned with the Vendor's submittal to determine Local Preference eligibility, however it must be returned at time of solicitation submittal to qualify for the Tie Break criteria. If not provided with submittal, the Vendor must submit within three business days of County's request for evaluation of Local Preference. Proof of a local business tax should be submitted with this form. Failure to timely submit this form or local business tax receipt may render the business ineligible for application of the Local Preference or Tie Break Criteria.

In accordance with Section 21.31.d. of the Broward County Procurement Code, to qualify for the Tie Break Criteria, the undersigned Vendor hereby certifies that (check box if applicable):

☐ The Vendor is a local Vendor in Broward County and:

- a. has a valid Broward County local business tax receipt;
- b. has been in existence for at least six-months prior to the solicitation opening;
- c. at a business address physically located within Broward County;
- d. in an area zoned for such business;
- e. provides services from this location on a day-to-day basis, and
- f. services provided from this location are a substantial component of the services offered in the Vendor's proposal.

In accordance with Local Preference, Section 1-74, et. seq., Broward County Code of Ordinances, a local business meeting the below requirements is eligible for Local Preference. To qualify for the Local Preference, the undersigned Vendor hereby certifies that (check box if applicable):

☐ The Vendor is a local Vendor in Broward and:

- a. has a valid Broward County local business tax receipt issued at least one year prior to solicitation opening;
- b. has been in existence for at least one-year prior to the solicitation opening;
- c. provides services on a day-to-day basis, at a business address physically located within the Broward County limits in an area zoned for such business; and
- d. the services provided from this location are a substantial component of the services offered in the Vendor's proposal.



Local Business Address:

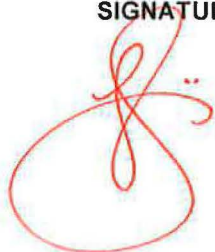
Vendor does not qualify for Tie Break Criteria or Local Preference, in accordance with the above requirements. The undersigned Vendor hereby certifies that (check box if applicable): The Vendor is not a local Vendor in Broward County.

**AUTHORIZED  
SIGNATURE/NAME**

**TITLE**

**COMPANY**

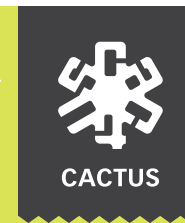
**DATE**



Strategy & Marketing  
Project Manager

Cactus Mktg  
Communications

3-20-19



# BROWARD COUNTY + CACTUS

**RFP RESPONSE . 3.20.19**



# HI. WE'RE CACTUS

We exist to grow brands that help people thrive. And we can think of no better place for people to thrive than among the vibrant communities, countless discoveries, and the energetic, welcoming people of Broward County. We firmly believe that your story is one worth boasting about. And we'd be honored to have the opportunity to help you tell it well.

We're passionate about destination marketing, and we've had our eye on Broward County. We've followed your intentional evolution from a laid-back beach community to a vibrant cosmopolitan city that offers a wealth of authentic experiences and culture. We're big fans of the Greater Together platform, and we couldn't be more excited about the opportunity to help the Greater Fort Lauderdale Convention & Visitors Bureau (GFLCVB) realize the platform's full potential in attracting new and diverse visitors, increasing their length of stay, and helping them discover all the area has to offer beyond the beach. Cactus is perfectly positioned to help the GFLCVB fulfill your vision of developing a revitalized personality and refreshed brand image in order to drive continual economic prosperity for the entire Broward County community, including all 31 of your municipalities.

***Thank you for considering Cactus as your agency partner. We look forward to earning your trust.***



ABOUT CACTUS

OUR VITALS

LEGAL ENTITY NAME:

CACTUS MARKETING COMMUNICATIONS  
2128 15TH STREET  
DENVER, CO 80202  
303.455.7545  
[WWW.CACTUSINC.COM](http://WWW.CACTUSINC.COM)

COMPANY FACILITIES:

OUR HEADQUARTERS IN DENVER, COLORADO  
IS THE ONLY COMPANY FACILITY.

YEAR FOUNDED:

1990

STATE OF  
INCORPORATION:

COLORADO

LEGAL COMPANY  
STRUCTURE:

CACTUS IS AN S CORPORATION

OUR OWNERSHIP

FOUNDER AND CHIEF  
EXECUTIVE OFFICER:

JOE CONRAD

PARTNER AND CHIEF  
CREATIVE OFFICER:

NORM SHEARER





# CACTUS TEAM

## 1. CACTUS TEAM

1. Describe the qualifications and relevant experience of the Project Manager and all key staff that are intended to be assigned to this project. Include resumes for the Project Manager and all key staff described, including staffing to support media planning and buying. Include the qualifications and relevant experience of all subconsultants' key staff to be assigned to this project.

# YOUR FULL CACTUS TEAM.

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Your Cactus team, including a unique mix of strategists, media planners and buyers, art directors, copywriters, designers, technologists, developers and producers, will be assigned to each individual campaign and project, giving us the ability to provide you with the most appropriate resources to solve each assignment. This team structure enables you to receive consistent day-to-day leadership from your core team who knows your industry, history, preferences, philosophies and tastes, complemented by additional team members who regularly bring new perspectives, ideas and points of view to your account.

***The Cactus team provides the experience, capabilities and resources you need to build your brand and drive your business forward. Your integrated team will be dedicated to partnering together to develop effective ideas and solutions for you and with you.***

## 1. CACTUS TEAM

# YOUR CORE CACTI.

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Your core Cactus team will be comprised of an account director, account manager, media director, project manager and creative director. This core team will lead your business and relationship with the agency, serving as your primary day-to-day points of contact. This team serves as the consistent thread throughout our client/agency relationship, overseeing all agency activities, as well as collaboration with your team, other marketing partners and county departments or divisions, to ensure quality and brand continuity across every aspect of the work we produce. And you can rely on our word and our reputation to be confident that you'll always receive proactive thinking, responsive action and the utmost accountability throughout every aspect of our relationship and every part of our process – from strategy and creative development, to production, launch and evaluation.

***We'd like you to meet the team leading the charge.***

## 1. CACTUS TEAM

# OUR OWNERS

**JOE CONRAD***FOUNDER & CHIEF EXECUTIVE OFFICER*

Since its founding, Joe has been the driving force behind the agency's vision and mission, putting his thought leadership and strategic talents to work for clients spanning tourism to healthcare. Under his leadership, the agency has created award-winning, results-driven campaigns for clients in the public, private, government and non-profit arenas. Joe spearheads Cactus' strategic planning process – directing research, uncovering key creative and operational insights, crafting winning positions and developing integrated marketing communications campaigns. For more than 28 years, Joe has been on the front line, working with clients to figure out how to do more with less, to be innovative, to outsmart the competition, to break through and to make connections with their audiences. Throughout Cactus' history, Joe has worked on all of the agency's travel and tourism accounts.

**NORM SHEARER***PARTNER & CHIEF CREATIVE OFFICER*

After joining Cactus in 2003 as a creative director, Norm quickly became a champion of the agency's mission and goals, leading him to become a co-owner in 2007. His passion, inspiration, creativity and contagious energy are what fuel the team around him. As head of the creative department, Norm oversees the precise execution of all creative work, making sure that no idea is left unspoken and that no creative path is left untraveled. He's just as concerned with implementing a solid strategy as he is with producing a powerful creative message – ensuring that each piece of messaging we create is engaging, effective and on-strategy. With deep and expansive experience in the travel and tourism sector, Norm has worked on clients such as Downtown Denver Partnership, Globus Family of Brands, Jackson Hole Travel and Tourism, Keystone Resort, Breckenridge Resort and Winter Park Resort.

**1.**  
**CACTUS TEAM**

# STRATEGY



**MIKE LEE**

*VP, STRATEGY*

For the past 22 years, including nine at Cactus, Mike has worked tirelessly to develop overarching strategies for our clients to solve marketing challenges from an integrated and unified perspective. As a big picture thinker who excels at blending big data with audience insights to craft proven strategies that resonate with consumers and help clients achieve their brand and business objectives, Mike is an expert at taking complex ideas and boiling them down into easy to understand concepts. Over the years, Mike has contributed his strategic thinking to a number of travel and tourism clients including Winter Park Resort, Vail Resorts, Breckenridge, Globus Family of Brands, Washington County Tourism, and Jackson Hole Travel and Tourism.



**MOLLY KATZ**

*ACCOUNT PLANNING DIRECTOR*

Molly is a skilled market researcher with a love for data and an expertise in both qualitative and quantitative research. Her department is responsible for representing your target audiences – keeping their needs and perspectives top-of-mind, while providing our teams with insights as to what motivates them, where to find them and how best to connect with them in a meaningful way. Combining research with strategic thinking to develop consumer insights, Molly works closely with our strategic, creative and communications teams to create distinct and relevant messaging platforms that resonate deeply with audiences. Her category experience includes Jackson Hole Travel and Tourism, Vail Resorts, Vail Local Marketing District, Washington County Tourism and Barbados Tourism.

**1.**  
**CACTUS TEAM**

# ACCOUNT SERVICE



**AINSLIE FORTUNE**

*VP, ACCOUNT SERVICE*

For more than 20 years, including nine years at Cactus, Ainslie has been dedicated to making her clients and their brands thrive. As head of client services, she oversees the account and strategy teams to deliver insights that further advance business objectives in growth and profitability for all of Cactus' clients and accounts. She has worked with an impressive list of travel and tourism brands, including the Globus Family of Brands, Jackson Hole Travel and Tourism, Vail Resorts, The North Face, Washington County Tourism, Steamboat Ski Resort and Vail Local Marketing District. Ainslie will be supported by Account Manager, Hannah Green, working hand-in-hand to handle all client contact and account management activities.



**DAY-TO-DAY  
CONTACT**

**HANNAH GREEN**

*ACCOUNT MANAGER*

Hannah is known for doing whatever it takes to provide exceptional client service while simultaneously ensuring Cactus produces the highest quality work. Hannah's strategic thinking and quick wit complement her congenial nature, making her a true partner to her Cactus team and to her clients. Her experience working with clients such as CommunityAmerica Credit Union, Vail Mountain and Vail Local Marketing District perfectly position her to be a strong lead for the Broward County account. Hannah will support Ainslie on all daily account management activities, including client communication, coordinating and managing all reviews and approvals, status reports, project and campaign briefs, and staying in step with Cactus' internal teams to manage brand consistency, project schedules and budgets.



## 1. CACTUS TEAM

# MEDIA COMMUNICATIONS



**LISA HUBBARD**

MEDIA DIRECTOR

Lisa began her career more than 13 years ago, and has worked with clients in almost every category. Her cross-platform media strategy, planning and buying talents are put to work daily, making her well versed in both traditional and non-traditional media planning. Results-oriented, she prides herself on developing strong, trusting relationships with her clients, and her team. Lisa leads a team of media planners, buyers and analysts, overseeing communications strategy and planning to provide the roadmap for all campaign efforts. She and her team are constantly looking for new ways to use paid media to solve business problems, to determine the most effective strategies and tactics to connect with audiences and achieve objectives, and to apply data analysis to optimize campaigns for future work. Lisa's category experience can be seen through her work on clients such as Washington County Tourism, Vail Resorts and Visit Denver, on both the consumer and meetings/convention sides of the business.

***Lisa will be supported by a team of savvy media planners and buyers to assist with day-to-day duties related to media strategy, general planning and buying, and all integrated communications efforts.***

**1.**  
**CACTUS TEAM**

# CREATIVE



**JEFF STRAHL**

*CREATIVE DIRECTOR*

Jeff has been leading the creative charge with clients for more than 20 years. With his passion and fierce integrity for producing innovative creative, he directs, encourages and works with our teams throughout all aspects of creative development and implementation. He is able to combine traditional advertising and design practices with emerging digital technologies in unique ways to create a common bond between brands and their audiences. Jeff brings strong travel and tourism experience working on clients such as Colorado Tourism Office, Exclusive Resorts, Washington County Tourism, Jackson Hole Travel and Tourism, and Winter Park Resort.



**ANDREW BAKER**

*CREATIVE TECHNOLOGY DIRECTOR*

Andrew inspires and guides the creative application of digital technology within each campaign, project and tactic Cactus produces for our clients while staying on the cutting edge of new technologies. Directly overseeing our digital designers and developers, and as a multi-disciplinary designer and front-end developer himself, Andrew's focus is on building exceptional, user-centered digital solutions that are born from research, consumer insights and brand strategy. Andrew's travel and tourism experience includes Colorado Tourism and Visit Denver.

## 1. CACTUS TEAM

# CREATIVE OPERATIONS



**LISA VAN SOMEREN**

*VP, CREATIVE OPERATIONS*

With more than 25 years of advertising and marketing experience, including 22 at Cactus and time spent in the fields of public relations, account management, traffic and production, Lisa understands the workings and processes of an effective agency like few others do. With her extensive background, she is an expert at managing both small- and large-scale client projects and campaigns, and leading her project management and production teams in doing the same. As the one who is ultimately responsible for the agency's performance of on-scope, on-time and on-budget services, Lisa establishes and enforces agency process and procedure, and plays a lead role in the management of each client's budgets, guiding the preparation of estimates, scopes, budgets and statements of work for all major agency initiatives. Throughout her tenure at Cactus, Lisa has had the opportunity to work on nearly every travel and tourism client on the agency's roster.

## 1. CACTUS TEAM

# CREATIVE OPERATIONS CONTINUED



**JAMIE LAMORA**

PROJECT MANAGEMENT DIRECTOR

Jamie puts the phrase “get stuff done” to shame. With 10 years of experience, a background in production, and a keen eye for the details, Jamie is equipped to manage the most complex of campaigns and budgets. Jamie leads the day-to-day project management activities for our clients, developing and overseeing schedules, budgets and the successful execution of every project and campaign. The project management team’s focus is on outlining and tracking the scope of work, budgets, deliverables and deadlines as they smoothly and efficiently guide the work through the agency with exceptional attention to detail along the way. She has worked on travel and tourism accounts including Jackson Hole Travel and Tourism, and Globus Family of Brands.

***Lisa and Jamie will be supported by a team of project coordinators who will help handle day-to-day project management activities for all Broward County projects and campaigns.***



**BROOKE WOODRUFF**

PRODUCTION DIRECTOR

Brooke provides daily leadership to Cactus’ production team, overseeing integrated print, broadcast/video, out-of-home, experiential and digital producers. Bolstered by nearly 15 years of extensive and wide-ranging experience as a broadcast and video producer, Brooke leads our team’s efforts in sourcing and procuring production services, as well as managing external partners and in-house production resources to ensure technical specs are adhered to and creative excellence is attained. Brooke has produced campaigns for travel and tourism clients including Vail Resorts and Vail Local Marketing District.

***Brooke will be supported by subject-matter-expert producers in print, broadcast/video, and digital to manage the production of all Broward County projects.***

## 1. CACTUS TEAM

# BUSINESS OPERATIONS



**KRIS BYERS**

*VP, BUSINESS OPERATIONS*

Kris brings more than 25 years of accounting and business management experience, and is responsible for managing and processing all contractual and financial aspects of the work we produce on behalf of our clients. This includes overseeing agency financials, managing all client and vendor billing, administering our company benefits programs and insurance matters, troubleshooting and updating agency computer and network systems, and keeping our team well outfitted with equipment and supplies. Kris has been at Cactus for 12 years, providing a firm foundation for all of our operations.

## **1.** **CACTUS TEAM**

# SUBCONSULTANTS

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Cactus will be responsible for all work associated with this contract. While Cactus has not made any formal agreements with subconsultants or partners to provide specific services listed in the RFP, we will leverage our strong relationships with top consultants, research, media and production partners throughout the region, nation, and world to develop and implement the best solutions on your behalf. And we will always work to keep your interests, expectations, budgets, and timelines at the forefront.

# 2. PROJECT APPROACH

## 2. PROJECT APPROACH

*2. Describe the prime Vendor's approach to the project (message platform, channel strategy, integration). Include how the prime Vendor will use subconsultants in the project.*

# INSIGHT-DRIVEN STRATEGY, STRATEGY-DRIVEN CREATIVE, CREATIVE-DRIVEN RESULTS.

**At Cactus we have a proven process for collaborating with destination partners to develop, deploy and optimize highly effective tourism marketing campaigns. It's a process that enables us to create work that breaks through the clutter, connects with target audiences, and generates bottom-line impact.**

Successfully customizing our approach to the unique needs of Broward County begins with gaining a holistic understanding of the Broward County travel industry, including how to maximize revenue for Greater Fort Lauderdale tourism businesses, airport, and port. In beginning that process, we'll consider how to most effectively measure success through conversion data and lodging metrics (such as ADR, RevPAR, occupancy, and tax revenue), as well as through metrics such as community buy-in and engagement with our tourism brand and campaign.

A second key aspect of our holistic understanding will come through collaborating with partners to quickly identify how our prospective travelers discover a destination, how they plan and book, how they arrive, where they spend money, and how long they stay. We'll develop actionable insights by gaining deep information about who our current visitors are, as well as an awareness of who we desire our future visitors to be – discovering why they travel, and how we can develop relevant, arresting creative that will inspire them to visit and to stay longer.



## 2. PROJECT APPROACH

# WE'LL APPLY OUR RELEVANT EXPERIENCE TO CREATE CUSTOMIZED SOLUTIONS.

Cactus will bring a proven process and approach, deep experience in travel and tourism marketing, and some of the most talented strategic and creative thinkers in the industry. We also bring a unique perspective on your current situation, bolstered by the experience of having helped destination communities that were in similar situations. On behalf of the GFLCVB, Cactus will focus the effectiveness of our unique perspective, experience, talent and approach on the goal of maximizing revenue while romancing the community's youthful, energetic vibe, and the rewarding discoveries that await each traveler.

Not only is Cactus significantly experienced in tourism marketing, but we also have a proven track record of working with tourism boards and DMOs that are in a similar position to that of the GFLCVB. We know firsthand the challenges of having a highly competitive market immediately adjacent to you, and we know how to overcome those challenges. Together, we will develop a unique and strategically crafted brand identity that helps Broward County rise above the threat of being overshadowed or overlooked.

- + We've helped multiple iconic travel brands successfully evolve from a visitor mix that's hindered by the limitations of outdated perceptions, and into a more inclusive mix of visitors who stay longer and spend more.
- + We know what it means for a DMO to be historically defined by a single aspect of its tourism product, and we understand the unique challenges that come with evolving a destination brand and shifting traveler perceptions.
- + We understand how to navigate the pressures that commonly exist in a fast growing, highly desirable destination community – specifically the tension between businesses that rely on tourism dollars and residents who don't really want tourists in their backyard.
- + We're skilled at developing comprehensive community-wide data strategies to not only drive marketing efficiency through ongoing evaluation and optimization, but also to support data driven decision-making.
- + We have a deep understanding of tourists, especially those who favor unique and local experiences, and who are seeking a sense of meaning from their vacation.
- + We know how to craft highly effective campaigns that benefit the entire community, not just one or two businesses. We're committed to engaging the community at every stage of our process, from insights and planning, all the way through to execution, including training on how they can use our efforts to support their own business success.

## 2. PROJECT APPROACH

# OUR PROCESS:

From account and strategy, to creative and production, to media planning and buying, the Cactus team is experienced and strong. Our in-house processes are organized, practiced, proven, and productive – and collaborative communication between our teams, your teams, and those of key stakeholders is prioritized and implemented at every phase.

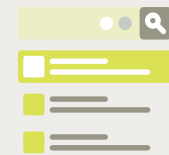


## 2. PROJECT APPROACH



### PHASE 1: ONBOARDING

We begin every client relationship with an onboarding that's designed to get us acquainted with your tourism product and fully up to speed as quickly as possible. This two- to three-day session is an immersive experience to understand the inner workings of your organization, your team, your community, and your goals. The agenda is carefully and collaboratively crafted with you to ensure we are making the most of our time together. Additionally, we'll use this as an opportunity to introduce you to your core Cactus team and to discuss the details, processes, and preferences of our working relationship.



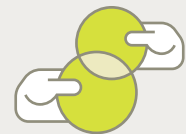
### PHASE 2: RESEARCH & STRATEGY

As a consumer-centric agency, we approach every marketing strategy, campaign, and individual tactic with a user-experience-like approach. Using a blend of research, tourism stakeholder input, experience, and proprietary data, we look for the intersection between your audiences, society and culture, and the Fort Lauderdale brand. It's at this intersection where we discover the core truth we'll use to inform our brand architecture and strategic messaging platform.

The research and strategy phase will be a highly collaborative process that includes:

- + Input and discovery sessions with GFLCVB members, as well as key tourism stakeholders, to gather insights, collaborate, gain consensus, and set expectations.
- + Conducting brand, category, and channel audits.
- + Exploring existing data and secondary research.
- + Identifying goals, objectives, metrics, and key performance indicators (KPIs).
- + Identifying and developing an understanding of key audiences.
- + Developing key brand, consumer, category, and cultural insights.
- + Conducting additional research as needed among key stakeholders and tourism-focused businesses within the Greater Fort Lauderdale area.  
(Research may include surveys, focus groups, interviews, meetings, and/or advisory councils.)
- + Workshopping with GFLCVB stakeholders to create the brand architecture, including the overall positioning, brand pillars, and the brand tone/voice.
- + Presenting all research findings and key insights, as well as the brand architecture and strategic platform, to the GFLCVB and key partners/stakeholders.

## 2. PROJECT APPROACH



### PHASE 3: BRAND ARCHITECTURE & IDENTITY REFINEMENT

*For examples of brand architecture, see question 2.1.c*

Using the insights gathered through discovery, we'll build upon the existing Greater Fort Lauderdale / Sunny brand with a refined brand platform, positioning, and identity. Most importantly, we'll define a meaningful brand story that differentiates Greater Fort Lauderdale from the competition, drives your business goals, and resonates with your core target audiences. This refined brand will provide clarity and consistency, will support your mission and values, and will serve as a road map for the brand and business as it's brought to life through future marketing efforts. We will also identify any needs for a new branding and visual identity. If needed, this will be developed under optional services.

This phase includes review of the following:

- + Architecture:
  - Brand vision
  - Brand mission
  - Brand platform
  - Brand manifesto
  - Brand character / archetype
  - Brand tone
  - Brand look and feel
- + Identity:
  - Logo
  - Tagline
  - Color palette
  - Brand visual design elements (i.e., icons, patterns, photography guidelines, etc.)
  - Fonts / typography



### PHASE 4: CREATIVE CONCEPT DEVELOPMENT

Equipped with our strategic insights, brand architecture, and fundamental brand messages, we then engage our integrated creative, digital, and production teams to generate compelling creative platforms and campaign concepts, along with simple and effective stories that are tailor-made to reach and motivate specific audiences. We take great pride in developing ideas that move your audiences into action by connecting with both the head and the heart, the rational and emotional. We produce marketing campaigns and digital experiences that are human, evocative, and clearly tied to your objectives.

Throughout the creation and execution of each campaign, we believe in continued communication and collaboration with our clients and stakeholders. Your account and project management teams will continue implementing additional check-ins and partner meetings in order to garner buy-in, report on progress, and ensure we remain on the right track from beginning to end.

The creative concept development phase includes:

- + Developing a creative brief that's reviewed with the GFLCVB team for approval.
- + Inputting Cactus' creative and production teams.
- + Developing creative campaign concepts.
- + Conducting internal Cactus creative review meetings.
- + Presenting creative campaign concepts to the GFLCVB.
- + Refining creative ideas as needed based on feedback.
- + Aligning on a chosen creative campaign concept platform.

## 2. PROJECT APPROACH



### PHASE 5: CHANNEL COMMUNICATIONS STRATEGY & PLANNING

With a focus on delivering truly integrated channel communications that create personal interactions with your target audiences, our communications strategists and media planners will work in tandem with the creative team to bring our campaigns to life through intelligent channel strategies and arresting placements and tactics. We take an integrated approach, considering every angle and opportunity – including paid, earned, and owned channels – and ensuring each campaign is implemented efficiently and effectively. Together with you, we'll finalize our communications strategy and plan, and we'll determine how best to define and measure success.

The channel communications strategy and planning phase includes:

- + Developing a communications brief that is reviewed with the GFLCVB for approval.
- + Inputting Cactus' integrated teams.
- + Conducting market, category, channel, and audience analyses (inclusive of media consumption habits).
- + Developing strategic insights.
- + Developing a communications strategy (inclusive of paid, earned, and owned channels), as well as a tactical mix designed to reach the right people, with the right message, at the right time.
- + Further defining metrics and KPIs.
- + Conducting internal communications strategy review meetings.
- + Presenting the communications strategy and tactical mix to the GFLCVB.
- + Refining the communications strategy and tactical mix as needed based on feedback.
- + Aligning on a communications strategy and tactical plan.



### PHASE 6: CREATIVE EXECUTION & PRODUCTION

Our creative and production teams are highly skilled and fully committed to delivering excellence in creative execution. Storytelling is at the heart of human connections as well as every great piece of marketing communications that we produce. Through a mix of cutting-edge creative ideas and tactics, along with sound project management skills, proven production techniques, and valued vendor partnerships, our work demands attention and inspires action.

Fulfilling the potential of a creative concept through flawless execution and production is one of Cactus' hallmarks. Our art directors, copywriters, designers, technologists, developers, and producers devote themselves to the details and see to it that every idea and tactic is delivered with exceptional execution. Working in concert with our creative development process, our project management and production teams diligently manage schedules, budgets, and the overall process along the way.

The creative and production phase includes:

- + Conducting a creative / production kick-off meeting to align on the specifications and deliverables identified in the plan.
- + Copywriting and editing of all tactics.
- + Designing and art direction of all tactics.
- + Cross-platform creative production, including sourcing, bidding, involvement, oversight, and management of all video, print, paid social, digital, email newsletters, digital and printed collateral, out-of-home, radio, and co-op materials.
- + Trafficking all creative assets and deliverables to media outlets and partners for distribution and launch.

## 2. PROJECT APPROACH



### PHASE 7: MEDIA BUYING & COMMUNICATIONS EXECUTION

Based on the approved channel strategy and tactical mix from phase five, our media communications team will proceed with executing the buy and developing earned media components. Our communications team purchases millions of paid media dollars each year in markets across the nation, including the latest in traditional, digital, social, programmatic, immersive digital, and AI-driven approaches to efficiently and effectively maximize budgets. Our buyers work hard to leverage opportunities and negotiate added value with every deal made – researching, analyzing, planning, and placing buys across all paid channels. Of course, consumers don’t differentiate between paid, owned, and earned media, so neither do we. Our paid efforts are always thoughtfully paired with public relations, social media, community outreach, strategic partnerships, grassroots activations, and owned communications channels to create a seamless experience that activates diverse audiences.

This phase of our process includes:

- + Exploring, contacting, planning and negotiating paid media with specific outlets.
- + Developing a tactical media flowchart that identifies all recommended placements, including the timing, reach, frequency, and costs for each.
- + Presenting a tactical media flowchart to the GFLCVB to secure approval.
- + Negotiating and confirming all media buy details, placements, and contracts.
- + Putting in place any tracking measures associated with the buy.
- + Gathering all production specs for paid media and sharing them with our creative, project management, and production teams.
- + Supporting our project management and production teams in trafficking all paid media assets to outlets.



### PHASE 8: LAUNCHING, TRACKING, OPTIMIZING & EVALUATING

When the campaign tactics launch, our team monitors paid media placements as they go live, ensuring proof of performance and that everything runs as planned. As campaigns are in market, we keep an eye on every detail – monitoring results in real-time, optimizing as needed, and reporting on pre-determined metrics and KPIs. By evaluating this information together with you, we gain a shared understanding of what’s working, what isn’t, and why. We then use these insights to optimize and advance our current and future work.

Ultimately, it’s the results that count. That’s why tracking, optimizing, and evaluating results is an essential part of our process for ensuring intelligent, effective, and highly adaptive campaigns. In order to effectively measure and evaluate effectiveness, it’s key that we collaboratively gain alignment on expectations early in the process, clearly defining benchmarks for success and agreeing on metrics, key performance indicators, and the measurement tools we’ll use. Together we’ll establish a framework for which tools we’ll use, exactly how we’ll measure success, when we’ll optimize, and what we’ll optimize toward, crafting the right methodology, process, timelines, and reporting tools for our campaigns throughout the year.

## 2. PROJECT APPROACH

### PHASE 8: LAUNCHING, TRACKING, OPTIMIZING & EVALUATING (CONTD.)

In our experience, the overall impact of DMO marketing efforts can be a difficult metric to track, so we recommend evaluating on three levels: short-, mid- and long-term outcomes.

In the **short-term**, we'll assess impact on as many fronts as possible from immediately available metrics across paid, earned, and owned channels.

- + Paid media metrics may include media impressions delivered, click-thru rates (CTRs), videos completions, etc.
- + Earned media metrics may include stories placed, influencers hosted, FAMS, etc.
- + Owned channel metrics may include monthly email opens, CTRs, website visits, time-on-site, social channel engagement, hashtag use, Visitor Guide distribution, requests for information, etc.

**Mid-term** impact is tracked by tourism-related metrics such as:

- + Lodging: Occupancy, ADR, RevPar, average number of days, etc.
- + General County Metrics: Events and Attraction numbers, Parks & Rec numbers, average daily spend, sales tax revenue, lodging tax revenue, etc. (calculated by third parties such as Adara Impact, VisaVue, etc.)
- + Meetings & Convention Metrics: Groups booked, room nights, economic impact, Convention Center metrics, etc.
- + Travel Metrics: Passenger numbers from Fort Lauderdale-Hollywood International Airport and Port of the Everglades, car rentals, etc.

**Long-term** outcomes are measured by looking at metrics such as Net Promoter Scores, brand awareness, and perceptions and attitudes, with data coming from surveys and social sentiment tracking. In combination, these metrics will paint a strong picture of performance and help to guide our future decisions.

The launching, tracking, optimizing, and evaluating phase includes:

- + Agreeing upon and establishing benchmarks for short-, mid- and long-term metrics.
- + Launching the campaign across paid media, as well as earned and owned channels.
- + Monitoring and optimizing creative and paid media placements.
- + Providing support and materials for ongoing events and community outreach.
- + Creating performance reports for co-op partners.
- + Developing a dashboard to monitor results and provide reporting while the campaign is in market.
- + Developing a wrap report following the conclusion of the campaign which outlines overall performance and reporting on agreed-upon metrics and KPIs.



## YEAR ONE TIMELINE

. 44



2.

TIMELINE

BROWARD COUNTY

YEARS TWO & THREE TIMELINE

BROWARD COUNTY		YEARS TWO & THREE TIMELINE																2020 / 2021																2021 / 2022																															
																		OCTOBER				NOVEMBER				DECEMBER				JANUARY				FEBRUARY				MARCH				APRIL				MAY				JUNE				JULY				AUGUST				SEPTEMBER			
																		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4								
		Week																																																															
1	ANNUAL RESEARCH & STRATEGY	Conduct Annual Research & Account Planning (as determined with GFLCVB)																																																															
2	ADDITIONAL CAMPAIGN(S) CONCEPT DEVELOPMENT	Brief, Input, Concept New/Refreshed Advertising Creative as Needed																																																															
3	ADVERTISING CAMPAIGN(S) CREATIVE EXECUTION & PRODUCTION	Creative Asset Production (copywriting, design, art direction, photography, illustration, video production, printing, digital development, production management, etc.)																																																															
4	PROJECT CREATIVE EXECUTION & PRODUCTION	Collateral Projects, Support & Promotional Materials (as outlined with GFLCVB)																																																															
5	ANNUAL CHANNEL COMMUNICATIONS STRATEGY & PLANNING	Conduct Annual Communications & Media Planning																																																															
6	MEDIA BUYING & COMMUNICATIONS EXECUTION	Tactical Media Planning & Buying																																																															
7	LAUNCHING, TRACKING, OPTIMIZING & EVALUATING	Launching, Tracking, Optimizing, Reporting, Evaluating																																																															
	ONGOING: GENERAL ACCOUNT MANAGEMENT, MEETINGS, REPORTING, CONSULTING																																																																

## 2. BUDGETING APPROACH

*2. Describe how the team would develop cost estimates and controls, indicating how they are updated, providing specific examples of successful recommendations implemented and cost containment strategies used to maintain project budget without sacrificing quality.*

# OUR APPROACH TO BUDGETING

As an agency, our responsibility is to consistently produce top-notch, quality work that achieves bottom-line results for our clients. No one-size-fits-all approach to budgeting and agency compensation is appropriate for all clients, so we cater the arrangement to each client's needs.

Based on the information we have so far, Cactus has outlined an annual flat fee structure for compensation of agency services, which will be billed as a monthly retainer fee. This compensation model allows us to maintain a consistent level of resources and services throughout the year, providing responsiveness, accountability and top-notch customer service to meet your needs and requests.

Our method for accurately budgeting and pricing agency fees begins by working with your team and other stakeholders/partners to conduct annual planning, set objectives and align on expected results. From there, we'll together outline and agree upon a detailed scope of work and services to be provided within the agency retainer agreement. Defining parameters is key, as the scope of work for individual research, strategic initiatives, campaigns, projects and deliverables is scalable and can vary significantly based on factors such as the amount and type of research, planning outcomes, final communications plans and tactical mix, number of deliverables and versions, required approval processes, rounds of expected client review and revisions, and design and production specifications, etc., as well as clearly defined roles and responsibilities for all parties.

## **2. BUDGETING APPROACH**

**WE'LL**  
**MANAGE YOUR**  
**FINANCES AS**  
**RESPONSIBLY**  
**AS WE MANAGE**  
**OUR OWN**

Our team has extensive experience with financial oversight, monitoring and managing budgets on behalf of our clients, and making sure that we're complying with all client requests and contractual requirements.

Through our in-house project management software, Cactus monitors and manages all agency staff time, project expenses and monthly billing against agreed upon client budgets. All third-party, out-of-pocket expenses will be estimated and approved by you in advance. Our media, production and project management teams effectively manage all subcontracted vendors to ensure budgets are adhered to and quality is maintained. We follow detailed monthly invoicing processes including monitoring and reconciling all media purchases for accuracy and proof of performance, detailed review of all agency time and expenses incurred in the month prior, and tracking budgets to actuals on all activities. Cactus keeps detailed records and back-up to verify all monthly billing, and submits to an annual financial audit for other government contracts.

Cactus will reconcile and provide detailed budget summaries for the annual budget which outlines any updates to the overall budget breakdown, and ensures the retainer agreement remains equitable for both parties and costs are within allocated budgets.

## 2.1. CREATIVE PORTFOLIO

*a. Provide samples of creative portfolio under agency's current management as a measure of creative capabilities and quality (include printed and digital collateral, out-of-home, broadcast).*

# CREATIVE PORTFOLIO

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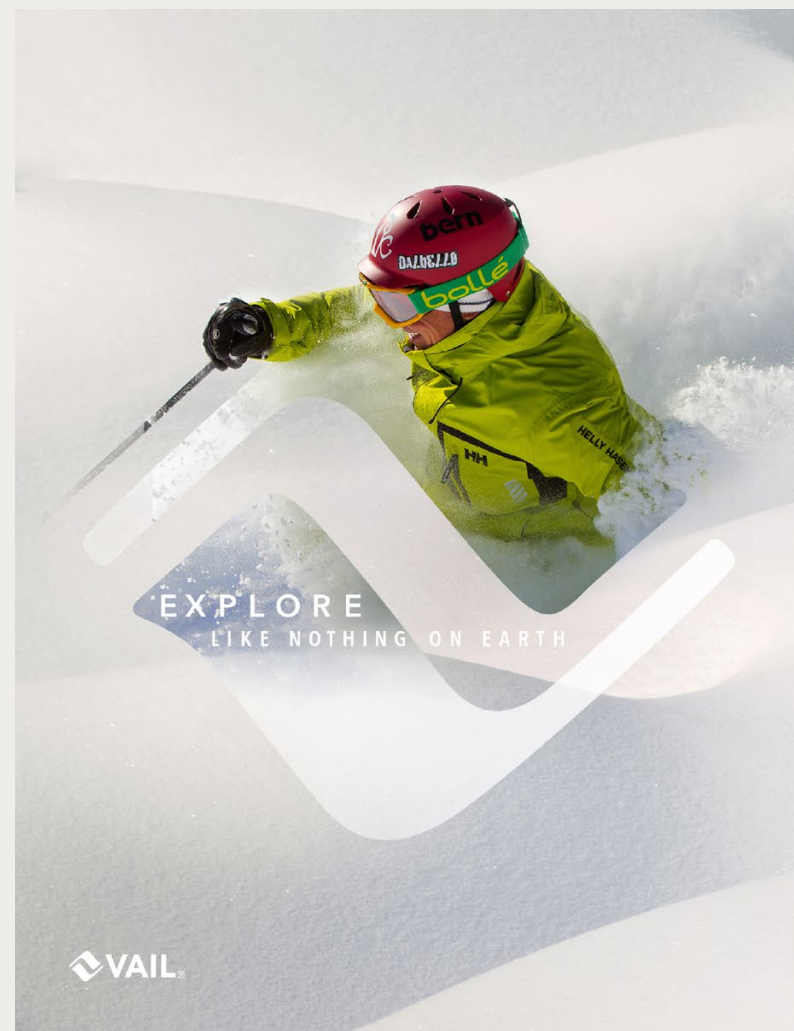
*Effective brand campaigns translate the simple, meaningful truths of your brand into compelling, resonant creative executions that motivate audiences to action. Easy to say; a challenge to consistently achieve. Here are just a few examples of how we've achieved that for our clients.*

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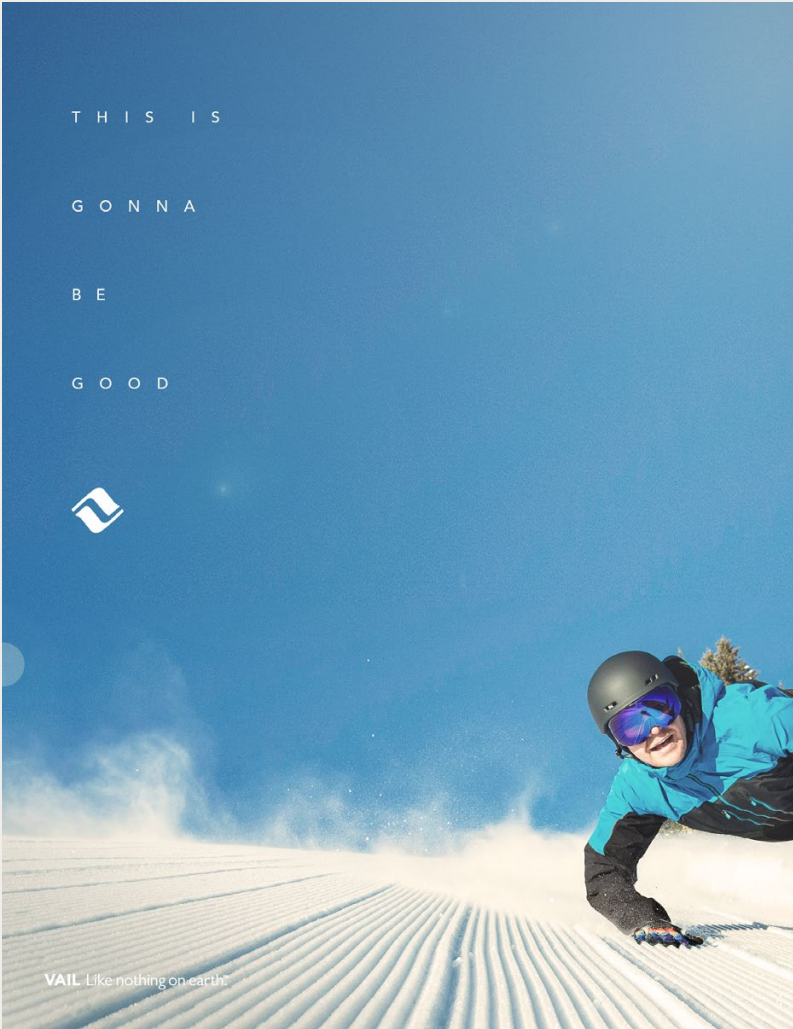
## 2.1. CREATIVE PORTFOLIO

# VAIL PRINT COLLATERAL





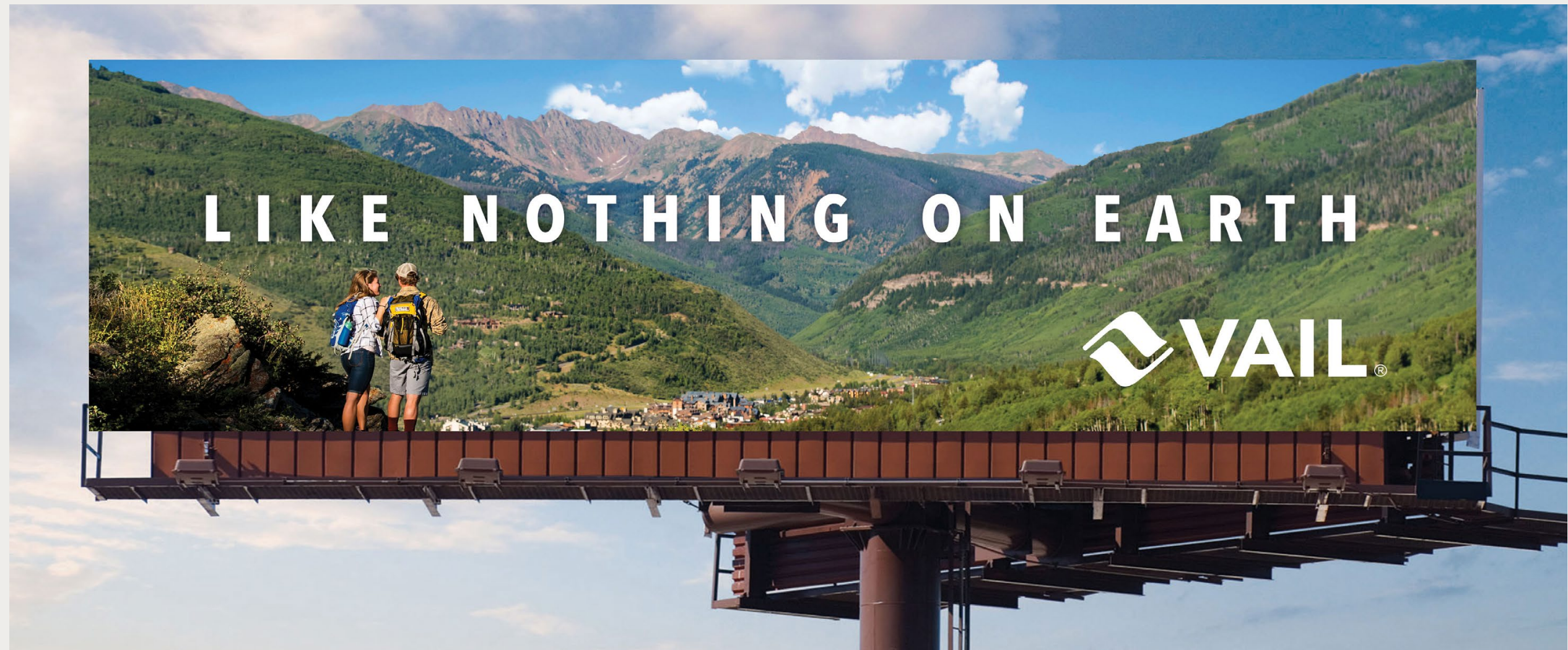
**2.1.**  
**CREATIVE PORTFOLIO**





## 2.1. CREATIVE PORTFOLIO

# VAIL OUT-OF-HOME





## 2.1. CREATIVE PORTFOLIO





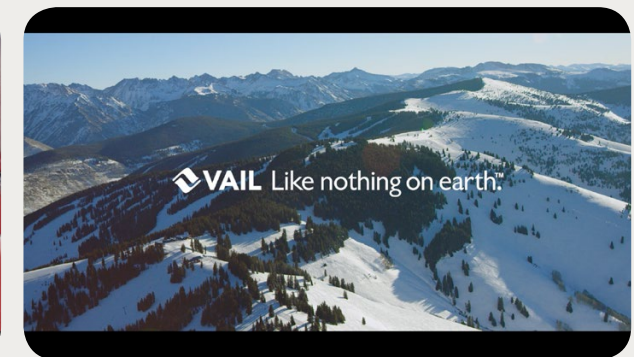
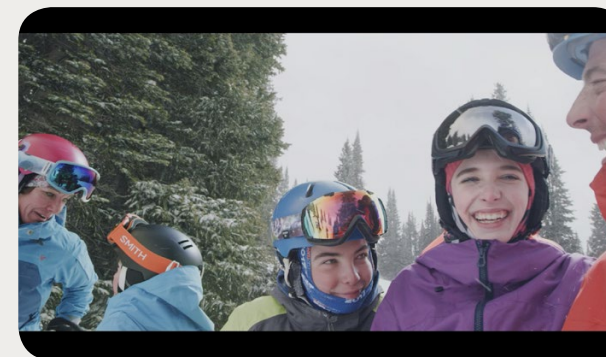
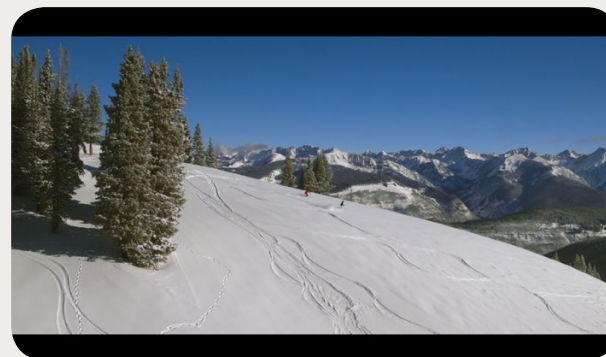
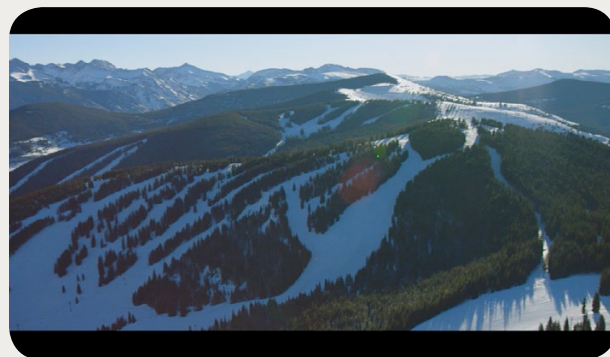
## 2.1. CREATIVE PORTFOLIO

# VAIL BROADCAST

Vail "Brand Anthem" [VIEW](#)

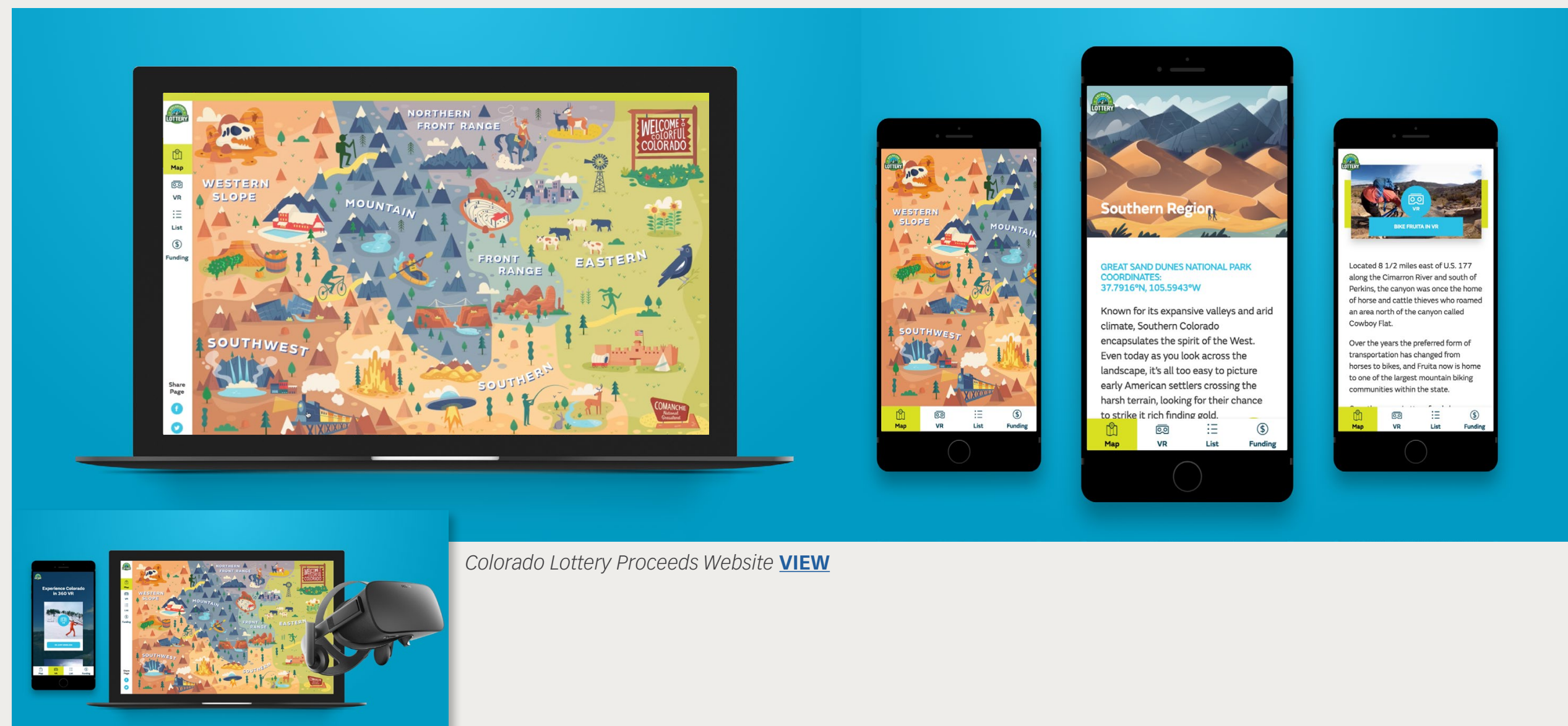


Vail "Never Settle" [VIEW](#)



## 2.1. CREATIVE PORTFOLIO

# COLORADO LOTTERY DIGITAL & PRINT COLLATERAL

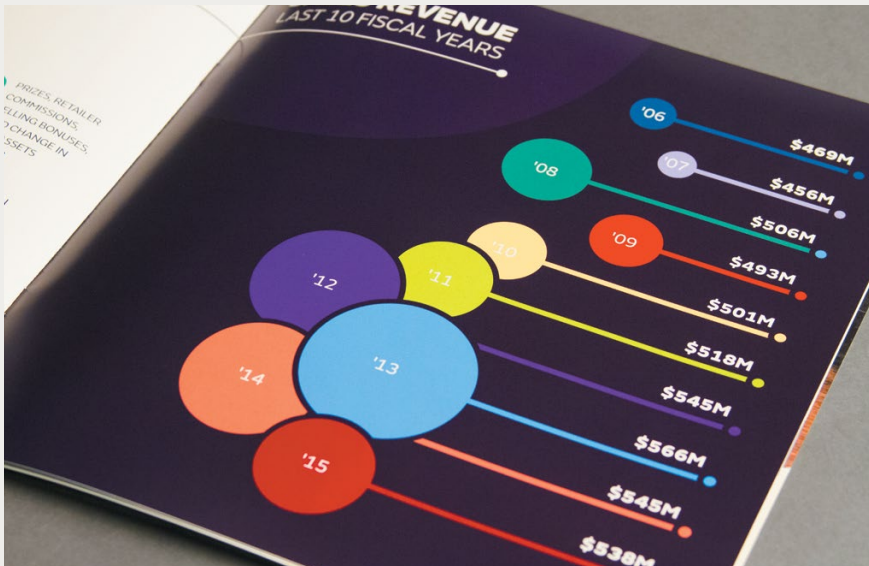


Colorado Lottery Proceeds Website [VIEW](#)



**2.1.**  
**CREATIVE PORTFOLIO**

Colorado Lottery Annual Report





**2.1.**  
**CREATIVE PORTFOLIO**

# COLORADO LOTTERY OUT-OF-HOME





2.1.

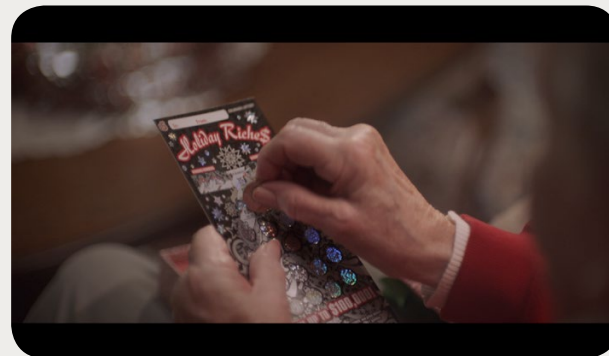
CREATIVE PORTFOLIO



## 2.1. CREATIVE PORTFOLIO

# COLORADO LOTTERY BROADCAST

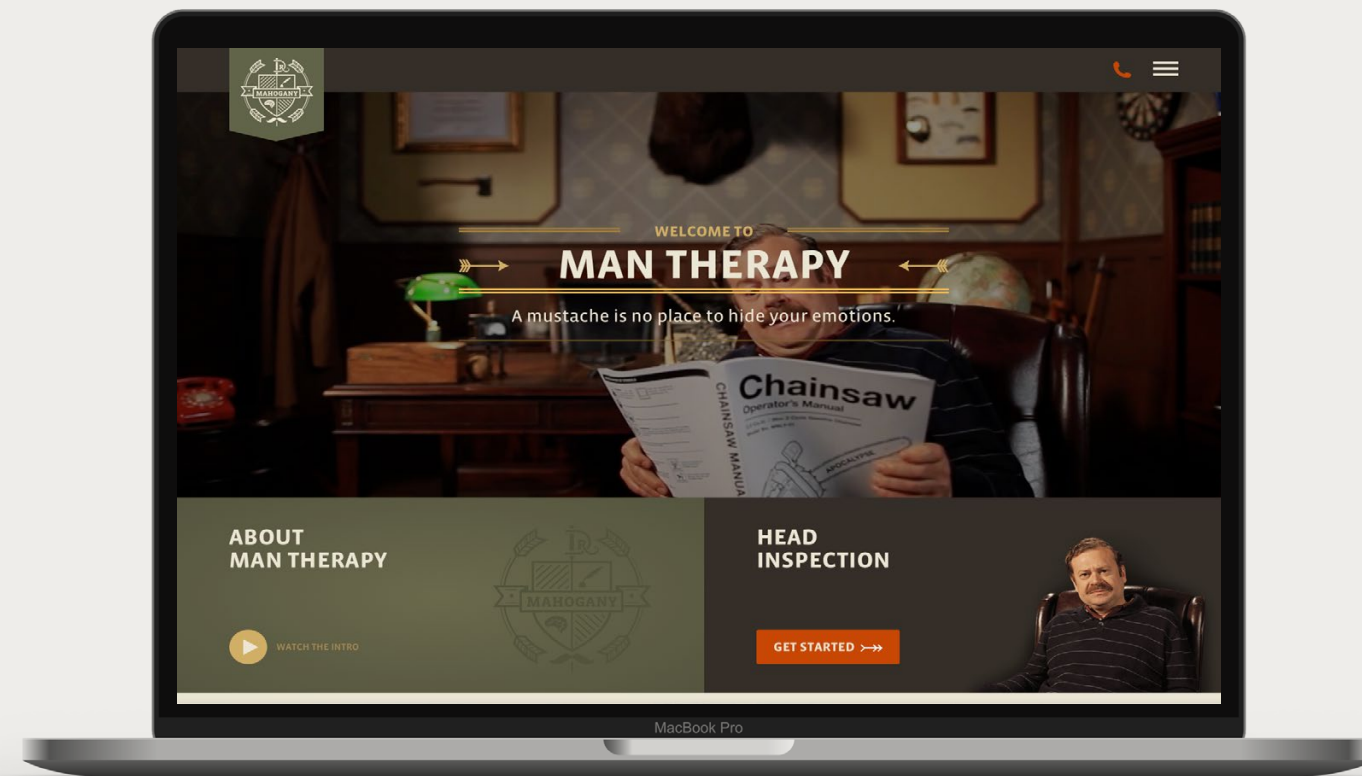
Colorado Lottery "Joy of Giving" [VIEW](#)





## 2.1. CREATIVE PORTFOLIO

# MAN THERAPY DIGITAL & PRINT COLLATERAL

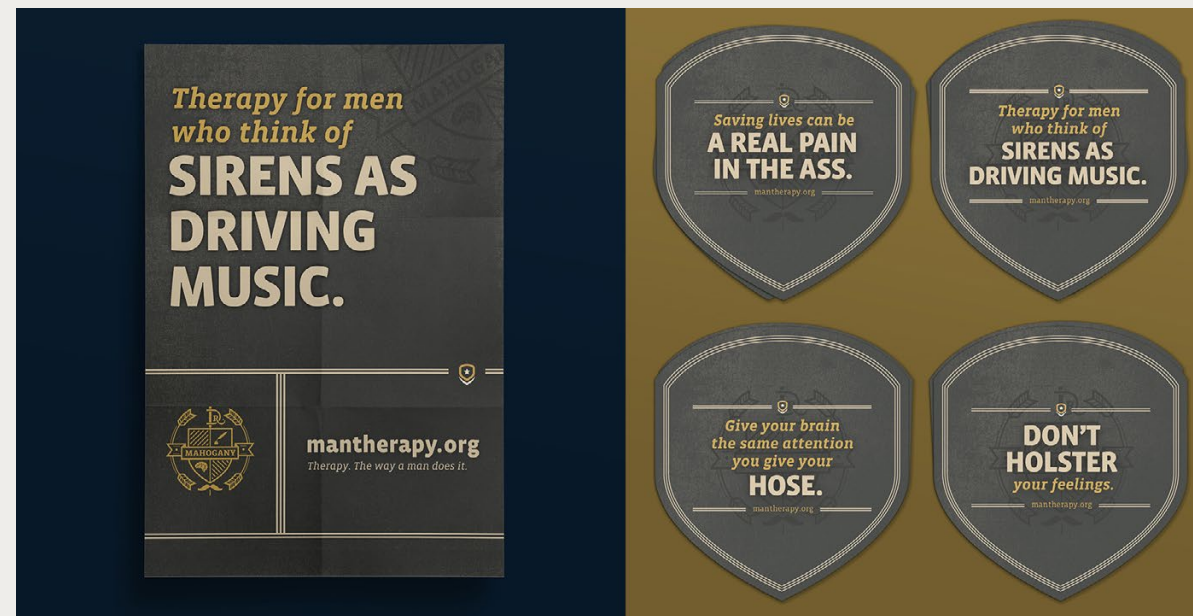


Man Therapy Website [VIEW](#)



Man Therapy Primary Care Kit

## 2.1. CREATIVE PORTFOLIO



Man Therapy Veteran and First Responder Collateral



**2.1.**  
**CREATIVE PORTFOLIO**

# MAN THERAPY OUT-OF-HOME



## 2.1. CREATIVE PORTFOLIO

# MAN THERAPY BROADCAST

Man Therapy PSA [VIEW](#)



## 2.1. CREATIVE PORTFOLIO

*b. Provide tourism case studies that measure return on investment (ROI) on work developed under the agency's existing executive or creative management.*

# WE KNOW TRAVEL AND TOURISM

The Cactus team is comprised of marketing specialists who not only bring their specific area of expertise to work for our clients, but also bring a tremendous amount of industry experience. Our team has collective experience gained at Cactus and from other agencies and corporations, working with brands from every sector of the destination travel, tourism and hospitality industry including state tourism offices, destination marketing organizations, hotels, real estate, resorts, travel sites, transportation, industry associations, entertainment and attractions. Our work has spanned a wide variety of marketing tactics including traditional advertising (TV, radio, print, out-of-home), digital and social, video, events and promotions, public relations, websites, SEO/SEM, direct marketing, collateral and design. Together, we bring experience that has promoted destinations and driven revenue from leisure and business customers, meeting planners, and tour and travel representatives.

## **2.1.** **CREATIVE PORTFOLIO**

# **OVER CACTUS' 29-YEAR HISTORY, WE HAVE HAD THE HONOR OF REPRESENTING THE FOLLOWING TRAVEL, TOURISM AND ATTRACTIONS BRANDS:**

---

VAIL MOUNTAIN

JACKSON HOLE TRAVEL AND TOURISM

JACKSON HOLE MOUNTAIN RESORT

VAIL LOCAL MARKETING DISTRICT

WINTER PARK RESORT

KEYSTONE RESORT

DENVER ZOO

GRAY LINE TOURS

AVALON WATERWAYS

GLOBUS

COSMOS

MONOGRAMS

COLORADO SKI COUNTRY

DENVER ART MUSEUM

VAIL RESORTS (destinations including Park City, Breckenridge, Beaver Creek)

THE BROWN PALACE HOTEL

DENVER CENTER THEATRE COMPANY

DENVER MUSEUM OF NATURE & SCIENCE

WASHINGTON COUNTY, UTAH TRAVEL & TOURISM



## 2.1. CREATIVE PORTFOLIO

# JACKSON HOLE TRAVEL AND TOURISM

### CHALLENGE

Cactus was selected by the Teton County Travel and Tourism Board to attract new visitors to the beautiful northwest corner of Wyoming during the fall, winter and spring seasons, with a budget comparable to the GFLCVB. Comprised of more than 870 businesses representing a wide-ranging spectrum of consumer interests, needs and experiences, the Jackson Hole community offers every level of visitor experience imaginable. From outfitters, galleries and guides to restaurants, retail and resorts; and from luxurious, high-end and pampered to modest, rustic and adventuresome, the businesses within this small community cater to visitors of all kinds. And to top it all off, Teton County also happens to be home to three ski resorts, two iconic national parks, a national forest and the National Elk Refuge. The problem the community faced was competition – both internal and external. For years, the businesses and attractions of the Jackson Hole community had been marketing to prospective destination visitors individually, and oftentimes in direct competition with one another. At the same time, even with the implementation of a new lodging tax, Jackson Hole was being outspent by other premier winter destinations at a rate of up to three to one. To overcome these challenges, Cactus worked with the community to create a long-term strategy that could collectively leverage every business within Teton County to support our seasonal campaigns and dramatically increase overnight lodging, especially during the winter ski season.

### LONG TERM STRATEGY | COMMUNITY PARTNERSHIPS

First, we dove into Jackson Hole's key target audiences and mapped out their specific travel decision-making cycles. In the early stages of the decision-making process, potential travelers are looking for digital content to inspire and entice them to visit. Tactics that showcase the destination experience and content from trusted friends and family are especially influential. Therefore, with each campaign, we not only focused on high-impact mediums such as out-of-home and print, we also relied on rich media and consumer-driven social engagement opportunities. Second, we launched a multi-year series of community trainings and workshops designed to empower Jackson Hole businesses to directly participate in and support our seasonal campaigns through social and digital tactics at strategic points along the traveler decision-making journey. Unlike many tourism conferences that overload participants with information, our trainings strategically focused on key platforms and concepts that build over time and, in turn, played a vital role in our campaigns each year.

## 2.1. CREATIVE PORTFOLIO

### SEASONAL STRATEGY | WINTER

Complementing our long-term strategy, we also developed a seasonal strategy to uniquely address Teton County's seasonal challenges. While best known for its world-renowned skiing, Jackson Hole has so much more to offer during the winter – activities like snowshoeing, dog sledding, and snowmobiling, as well as a variety of cultural arts and events. The offerings were there, but our target audiences didn't know about them. We knew we needed to communicate these attractions in a manner consistent with the Jackson Hole brand experience. We knew we needed to stand out in a crowded field of winter destinations. And we knew our voice alone wouldn't be sufficient. We needed the voices of every business in Jackson Hole working in concert to deliver relevant messages to relevant audiences. So we zeroed in on the Adventure Traveler segment – an affluent audience that values experiences over 'stuff' and desires once-in-a-lifetime adventures that provide luxury in the wild. They place a high value on how they spend time during their vacations, enjoying every moment instead of speeding through the moments like a ride at Disneyland. The Adventure Traveler is looking for a deeper, richer vacation experience. Skiing might be their primary motivator for traveling in the winter, but it certainly wasn't the only thing they wanted to do on their 'ski' vacation.



Out-of-Home





2.1.

CREATIVE PORTFOLIO

THE WORK | THERE'S MORE TO WINTER

Our audience insights led us to focus on the power of imagery to influence consumers when making travel choices, especially during the inspiration phase. So we set out to enable potential visitors to experience Jackson Hole through the eyes of people who are already there by building our campaign around Instagram. Through our community trainings, we introduced the hashtag #JacksonHole on Instagram so we could begin aggregating photos from both visitors and residents and feed them directly into our paid, owned and earned media channels. By creating a near real-time look at Jackson Hole, visitors were able to get a real sense of the place, as it looked right then, not as it looked on a particularly snowy day last spring. This strategy enabled us to inspire in-the-moment motivation within our Adventure Traveler audience, and authentically communicate the variety of winter activities available in Jackson Hole beyond skiing and snowboarding.



Print Ad



Print Ads



2.1.

CREATIVE PORTFOLIO

MEDIA & CHANNEL STRATEGY

All paid placements were geographically targeted to fly markets and behaviorally targeted to winter ski travelers. High-impact, awareness tactics including print, out-of-home and video were used to draw in our audience using stunning visuals and culturally relevant and emotive messages; while booking incentives and time sensitive messages were delivered digitally. Through display conversion tracking, we were able to see which digital placements were driving the most traffic to the booking site. This performance was reviewed and optimized once a week to be sure that we were maximizing spend and impressions with the highest performing placements. When it comes to winter resort tourism, snowfall equals revenue. So we put paid support behind Jackson Hole’s consistently strong snowfall story by incorporating dynamic weather banners into the paid digital tactical mix. This enabled us to not only geo-target regions where our snow story was superior, but also immediately capitalize on weather patterns that were moving in and dumping serious powder. And with near real-time Instagram-driven assets, our creative always matched our messaging. Additionally, we used digital magazine consumption on tablets to create a multi-layered, multi-sensory and multi-activity iPad ad unit, enabling us to further leverage content gathered from Instagram.

YEAR 1	YEAR 2	YEAR 3	YEAR 4
<b>TRAINING</b> visitors and local businesses to use #JacksonHole	<b>AGGREGATING</b> the conversation to display visual nature of JH	<b>ACTIVATING</b> influencers to bring to life all that Jackson Hole offers	Leverage photo and video to <b>INSPIRE</b> visitors at every stage of trip planning
TWITTER & FACEBOOK	TWITTER & FACEBOOK	TWITTER & FACEBOOK	TWITTER & FACEBOOK
	INSTAGRAM	INSTAGRAM	INSTAGRAM
		INFLUENCERS / TRIPADVISOR	INFLUENCERS / TRIPADVISOR
			ONLINE VIDEO
			PRINT
			OUT-OF-HOME



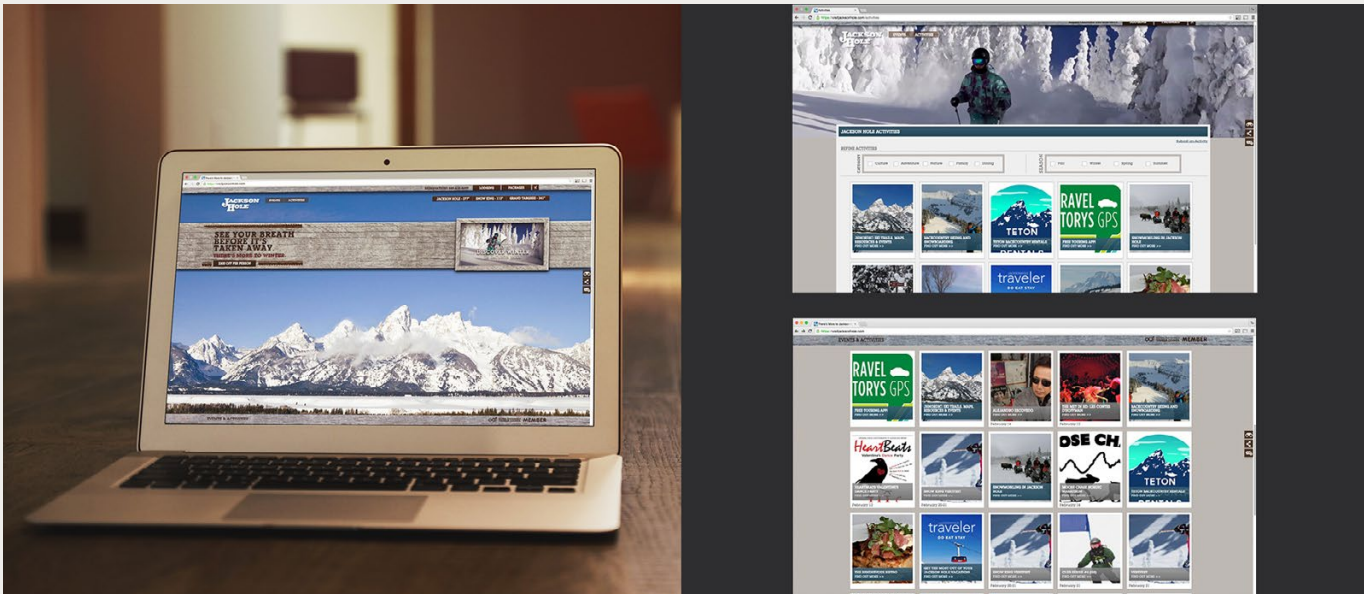
2.1.

CREATIVE PORTFOLIO

MEASURING ROI

Despite annual snowfall being down nearly 100 inches, Jackson Hole businesses bucked the trend by delivering across-the-board increases in destination spending and visits, and Jackson Hole Mountain Resort experienced a record-breaking year, surpassing 500,000 skier visits for the first time in history.

- + Jackson Hole Mountain Resort recorded highest skier/snowboarder visits in history
- + Ranked #1 ski resort in North America, 2014 by Ski Magazine
- + 5% increase in sales tax
- + 2% increase in overnight lodging
- + 2% increase in load factor = \$3 million in incremental revenue



Website



Out-of-Home



## 2.1. CREATIVE PORTFOLIO

# GLOBUS FAMILY OF BRANDS

For more than 80 years, the Globus family of brands has been providing a variety of vacations that address the needs of diverse travelers, from fully escorted and premium travel to independent budget and river cruise vacations. The Globus family of brands is comprised of:

## GLOBUS

The world leader in first-class escorted travel with more than 80 years of experience providing a variety of travel styles.

## COSMOS

With more than 45 years of experience, Cosmos combines the freedom of independent travel with the benefits of group travel, all at an unbelievable value.

## MONOGRAMS

Monograms combines the unparalleled freedom of independent travel with helpful expert assistance, so you get more fun and less hassle from your vacation.

## AVALON WATERWAYS

Avalon sets the standard in river and small ship cruising with the newest fleet and amazing itineraries. Unpack only once, relax and take in the sights.

## 2.1. CREATIVE PORTFOLIO

### BUSINESS CHALLENGE

Our challenge was to drive unique brand awareness and bookings among both consumers and trade for each of the Globus family of brands – Globus, Cosmos, Monograms and Avalon Waterways – while simultaneously developing a unified trade campaign that strengthens the bond between the entire family of brands and the vital travel agent network.

Cactus was hired by the Globus family of brands to differentiate and grow sales of each unique brand, with its own product offerings and target audiences, in the highly competitive packaged travel category, comprised of fully escorted, premium, independent, and river cruise vacations. The problem is, the category is jam-packed with competitors that promise many of the same things as the Globus family of brands. In addition to the challenges of standing out in a crowded market, the Globus family of brands must also account for the fact that the number of international travelers has increased by nearly 80 percent in the last 10 years while the number of travel agencies has decreased by half. At the same time, 85 percent of all trips sold by the Globus family of brands are booked through travel agents. Travel agents are bombarded with messages from airlines, hotels, cruise lines, and everything in between, encouraging booking through promotions, offers, and a variety of incentives. The travel agents are overwhelmed – emails pile up in their inboxes, trade publications stack up in their mailbox and for the most part they only have time and inclination to sort through it all when their customers ask for specific information. We knew that we had to develop an innovative campaign that could break

through all of the messages bombarding travel agents, and strengthen their bond with the entire Globus family of brands.

Since travel agents alone don't sell trips, we also knew that we had to reach the target consumer for each of the brands with highly targeted branding efforts to ensure that they were specifically requesting information from their travel agent about Globus, Cosmos, Monograms and Avalon Waterways.

### TO ACHIEVE THESE GOALS, CACTUS DEVELOPED A TWO-PRONGED APPROACH:

1. First, it was clear that we needed to develop a trade-focused campaign that reinforced the Globus family of brands' overall commitment to the vital travel agent network, allowed the sales team to adopt and use campaign elements in their daily interactions with travel agents, would break through the clutter and drive connection with travel agents bombarded by offers, deals and incentives on a daily basis, and above all else, would drive sales.
2. Second, since each brand has a unique identity, product and target audience, we set out to develop individual campaigns that leveraged the overall Globus family brand when appropriate, differentiated each brand from competitors and each other without cannibalizing customers, supported cross sell, resonated with both trade and consumers through highly targeted messaging and tactics, and most importantly, drove bookings.



2.1.

CREATIVE PORTFOLIO

TRAVEL AGENT & TRADE FOCUSED CAMPAIGN

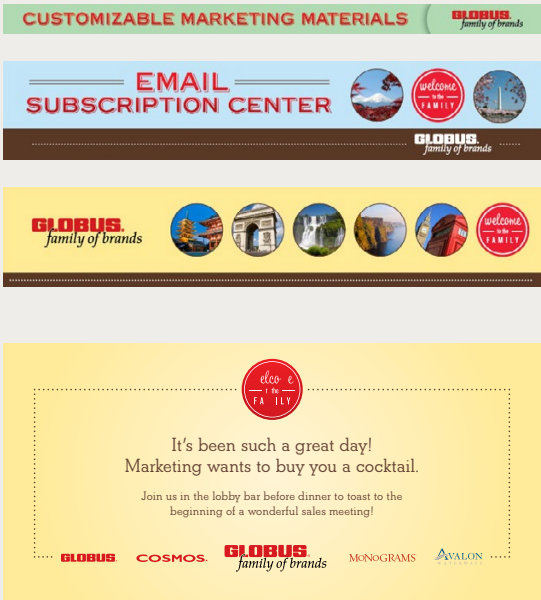
Cactus began by analyzing the Globus family of brands’ travel agent target audience – overwhelmingly female, age mid-50s, with varying levels of business acumen. For the campaign to resonate, it had to include a balance of business benefits messaging (how the Globus family of brands helps them make more profit through a compounding commission structure), and emotional reasons to sell each of the family’s products (a commitment to travel agents that the Globus family of brands will be there to support them and their clients through 24/7 support). The Globus family of brands had to make the overworked, pressed for- time travel agent understand all of the brands’ differentiators in as little as one, simple line.



Print Ad



Digital Banners

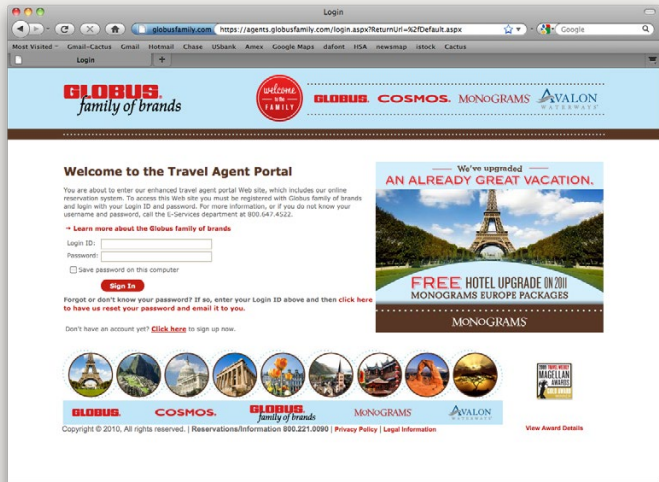


Digital Banners

WELCOME TO THE FAMILY

Cactus created the Welcome to the Family campaign which embodied the spirit of confidence, unity and collaboration that the Globus family of brands adopts with all its travel agent partners, while reinforcing the Globus family of brands’ unique differentiators. This trade-focused campaign was executed across print and online paid media, as well as collateral and at sales kickoff events.

This campaign was one of the most well received, earning accolades from the sales team about its usability and resonance with their travel agent clients.



Website

2.1.

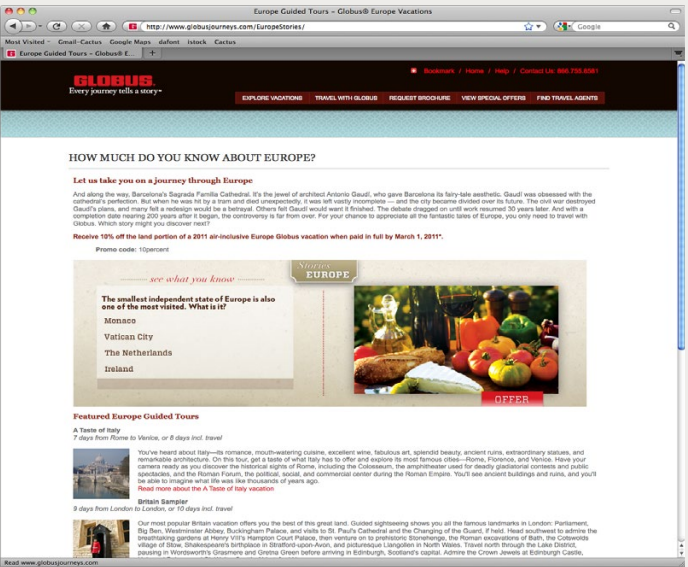
CREATIVE PORTFOLIO

BRAND CAMPAIGNS

In keeping with the second prong of the strategic marketing approach, Cactus focused on how to strengthen and expand each brand and cross-promote when appropriate.

GLOBUS

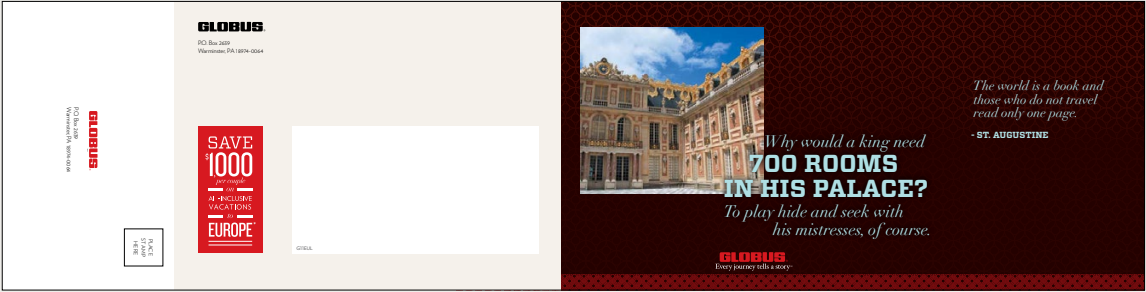
Globus provides high-end escorted tours, conducted by a tour director who takes care of all services from beginning to end. The tours include flights, hotels, transportation, transfers to and from the airport/hotel, most meals and sightseeing, and are typically conducted by motor coach. Escorted travel is a commodity market and travel agents and consumers perceive only minor differences between brands. We needed to find a way to tout the fact that Globus has been in the escorted tour business for more than 80 years; they are an industry leader and the expert in the market. The solution was in their engaging, experienced tour guides, and bringing to life the promise of their tagline, “Every Journey Tells a Story.” We partnered with some of the world’s foremost history experts and award-winning authors to uncover the “hidden” stories behind the places Globus visits. Armed with these stories, Cactus evolved the Globus campaign to leverage these stories to generate new demand and differentiate the Globus brand. The tone and personality of the campaign lived within the established Globus identity.



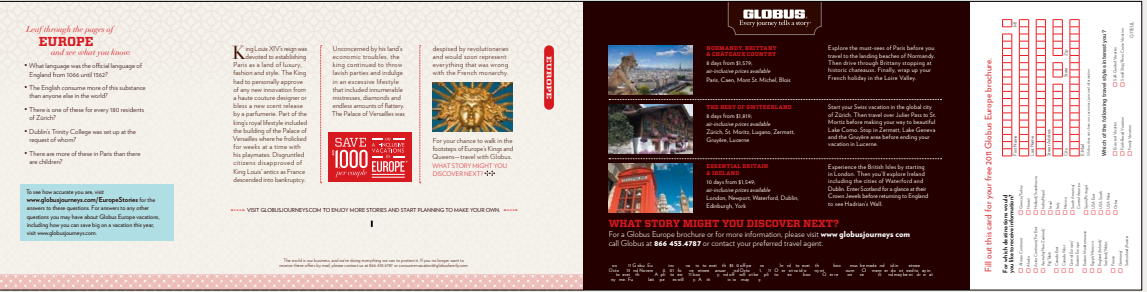
Website



Print Ad



Direct Mail



Direct Mail



2.1.

CREATIVE PORTFOLIO

COSMOS

Cosmos vacations combine the freedom of independent travel with the benefits of group travel. Similar to Globus in itineraries, Cosmos offers a more affordable option to the traveler interested in escorted travel. Cosmos is the forgotten child of the family of brands. Monograms and Avalon are the new kids on the block, taking the lion’s share of the overall marketing dollars. Globus has been an industry leader for 80 years, enjoying high travel agent favorability. How do we continue to grow the Cosmos brand with limited resources? Recognizing desire for “value” is at an all-time high, we needed to remind consumers that Cosmos is a value-touring brand, offering great vacations for affordable prices. We identified 10 Cosmos vacations under \$1,000, and incorporated them into all materials.

GREEK ODYSSEY

8 DAYS FROM \$939\*

IRISH EXPLORER

9 DAYS FROM \$999\*

BRITISH PANORAMA

9 DAYS FROM \$929\*

JEWELS OF FRANCE

8 DAYS FROM \$919\*

THE MAGIC OF THE ITALIAN LAKES

8 DAYS FROM \$999\*

PRAGUE, VIENNA & BUDAPEST

9 DAYS FROM \$899\*

JEWELS OF MOROCCO

10 DAYS FROM \$789\*

TUNISIAN ADVENTURE

8 DAYS FROM \$889\*

JEWELS OF SPAIN & PORTUGAL

9 DAYS FROM \$949\*

10 VACATIONS UNDER \$1,000

With Cosmos, smart, practical travelers can enjoy the benefits of group and independent travel at an unbelievable value. We put international travel within reach. Whether you prefer the lush landscapes of Britain & Ireland, the exotic flavors of Spain, or the ancient wonders of Greece, Cosmos can turn your travel dreams into reality.

866.285.9183 | [www.cosmos.com](http://www.cosmos.com)  
contact your preferred travel agent

CO MO

TURNING TRAVEL DREAMS INTO REALITY.

\*Land only prices. Air-inclusive prices available.

Print Ad

TEA & CRUMPETS

ME & YOU

10 VACATIONS UNDER \$1,000

Britain & Ireland

COSMOS

TURNING TRAVEL DREAMS INTO REALITY.

The splendor of EUROPE at a splendidly low price.

From the regal charm of Britain & Ireland to the captivating history of Spain, Europe is a celebration of the finer things in life. Cosmos gives you the freedom to explore the best of the continent at an unbeatable price. Make Europe yours today.

10 VACATIONS UNDER \$1,000

TUNISIAN ADVENTURE

8 days, starting at \$899\*

JEWELS OF FRANCE

8 days, starting at \$919\*

GREEK ODYSSEY

8 days, starting at \$939\*

CAIRO, ALEXANDRIA & THE MEDITERRANEAN

8 days, starting at \$999\*

THE MAGIC OF THE ITALIAN LAKES

8 days, starting at \$999\*

BRITISH PANORAMA

9 days, starting at \$929\*

PRAGUE, VIENNA & BUDAPEST

9 days, starting at \$899\*

JEWELS OF SPAIN & PORTUGAL

9 days, starting at \$949\*

IRISH EXPLORER

9 days, starting at \$999\*

JEWELS OF MOROCCO

10 days, starting at \$789\*

866.603.1315 | [www.cosmos.com](http://www.cosmos.com) | contact your preferred travel agent

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COSMOS

Digital Banner

55

3/22/2019

BidSync

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## Website



Monograms provides a product for travelers who want the freedom of independent travel but who prefer the convenience of a package that takes care of all the details, such as reserving hotels, air arrangements, airport transfers, and even guidance at their destination. Escorted touring is a dying market and more and more people are using online resources to book their travel plans. They want their vacations to be tailored to their needs and desires and not be given a set itinerary, however they do have some reservations about planning the perfect vacation. Globus family of brands is thought of as an escorted travel company and is known for the Globus and Cosmos brands. Customers are not aware of the Monograms brand and the solution that it provides to customers who are looking for more independent travel, while still leaving the details to an expert. While foreign independent travel is a growing market, there is still fear and uneasiness among consumers to book their first international vacation on their own. While a travel agent may not be their ideal solution, they would also like a trusted source to help them plan a vacation to a new destination. With the growth of online shopping, travelers have so many more options and resources to create their own vacation. Blogs and travel ratings give travelers the tools and power to book their own transportation, lodging and activities with relative confidence before their trip begins. What Monograms offers is the flexibility of choosing your itinerary, while providing the confidence of knowing that all of the details have been taken care of. Cactus developed an integrated campaign designed to saturate two mid-sized test markets. By booking a vacation themselves, travelers don't always recognize the complications and potential headaches they may face: poor hotel location, long lines at tourist sites, transport delays, language barrier, etc. With Monograms, all the details are handled with just one source, while you have the freedom to explore your destination with the confidence of Globus' 80 years of experience behind you. Television, print, direct mail and online tactics were created to demonstrate the simplicity of utilizing Monograms to plan a vacation.



2.1.

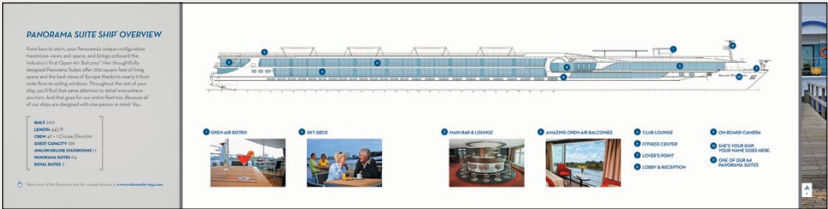
CREATIVE PORTFOLIO

AVALON WATERWAYS

Avalon Waterways offers travelers a river and small-ship cruise experience. River cruising provides a unique traveling experience as cruisers enjoy visiting a country the way it was born – along its waterways. Within the last few years, Avalon and its competitors have invested energy and resources to help educate the trade and consumers of the benefits and features of a river cruising experience. Awareness and understanding have been accomplished, particularly among the trade audience. However, while agents can speak knowledgeably to customers about river cruising, most do not differentiate between brands. It is a relatively even playing field, but establishing position in the category becomes more difficult as the industry matures. Now was the time for Avalon to break free from the crowd and become a leader in the category, securing advantage in the short-term and a strong market position for years to come. Avalon unveiled the launch of its newest ship, the all-suite Panorama. This was truly a groundbreaking design that was built entirely around the traveler to enhance the river cruising experience. From an open-air balcony to premium bedding in the suites, every detail was considered for the optimal journey. The attention to detail for this ship was the perfect catalyst to portray the kind of experience that can be expected from any Avalon Waterways river cruise. Using the Panorama as inspiration, Cactus created an Avalon campaign that exemplified the difference a traveler would experience on an Avalon river cruise. Each and every marketing tactic was seen as an opportunity to drive a sale and leave a lasting impression with key audiences, as well as establish a consistent way for them to describe what makes Avalon unique.



Print Ad



Direct Mail



Digital Banners



## 2.1. CREATIVE PORTFOLIO



Direct Mail

### MEASURING ROI

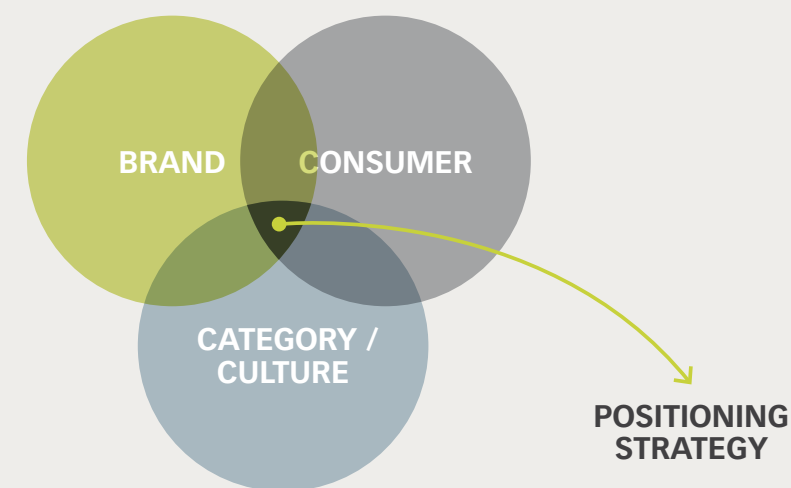
- + Globus family of brands:
  - 125M impressions delivered
  - 1.5M travel guides distributed
  - 310K+ inquiries from paid media
- + Globus:
  - 15% year-over-year sales increase
  - 10% increase in traffic to Globus site
- + Cosmos: 15% year-over-year sales increase
- + Monograms:
  - passenger growth of 50%+
  - 50% increase in traffic to Monograms site
- + Avalon Waterways: The Panorama launch resulted in a 67 percent increase in year-over-year sales in the United States.

## 2.1. CREATIVE PORTFOLIO

*c. Provide explanations and samples of how the team approaches the development of brand architecture for a destination or travel product.*

Having developed the brand positioning and architecture for dozens of clients across various industries, including travel and tourism, we have a clear point of view on a branding process that works.

As a consumer-centric agency, it's our job to persuade the hearts and minds of human beings. So we begin with an insightful understanding of the real people we intend to reach. Our strategic process starts with a multi-disciplinary team diving in to uncover the core truths that live at the intersection of consumer insights, category trends and the broader culture impacting your brand. We then put those truths to work, translating them into insightful strategies and custom-crafted solutions that engage hearts and minds in order to drive measurable results. Those strategies then provide the foundation for which brand positioning and brand architecture are built upon.



The following showcases examples of our output for other clients. For our complete brand architecture development process, please see Question 2, Phase 3.

2.1.

CREATIVE PORTFOLIO

VAIL



Brand Standards Guide

BRAND PROMISE:

A brand's stated purpose and strategy to succeed in a category relative to our consumers

THERE'S SOMETHING ABOUT BEING IN VAIL THAT JUST CAN'T BE PUT INTO WORDS. SOMETHING THAT MAKES US SURRENDER TO BEING FULLY PRESENT IN THIS PLACE. SOMETHING THAT IMMEDIATELY DISCONNECTS US FROM OUR EVERYDAY, WHILE SIMULTANEOUSLY RECONNECTING US WITH FAMILY, FRIENDS AND TO PARTS OF OURSELVES LONG FORGOTTEN. SOMETHING THAT REMINDS US OF WHAT WE LIVE FOR, WHAT WE WORK FOR, AND WHAT IT'S LIKE TO FORGET EVERYTHING ELSE BUT THE MOMENT WE'RE IN. BEING IN VAIL PUTS US BACK IN TOUCH WITH OUR SENSE OF AWE AND FALLS US WITH APPRECIATION FOR BEING AMAZED, FOR BEING A PART OF SOMETHING MAJESTIC, AND FOR JUST SIMPLY BEING. FROM EXPANSIVE AND EXHILARATING MOUNTAIN ADVENTURES BY DAY, TO LIVELY AND LUXURIOUS VILLAGE EXPERIENCES BY NIGHT, BEING IN VAIL RESURRECTS WITHIN US A CHILDLIKE SENSE OF JOY, AWE AND WONDER THAT TURNS EVEN THE SIMPLEST MOMENTS INTO TREASURED MEMORIES. VAIL IS LIKE NOTHING ON EARTH.

POSITIONING STATEMENT:

A unique, credible statement that concisely represents how our brand uniquely fits a customer need for our core audience

TO DISCERNING INDIVIDUALS WHO DESIRE PREMIUM EXPERIENCES, VAIL IS THE PINNACLE MOUNTAIN DESTINATION  
THAT INSPIRES AWE AND WONDER AT EVERY TURN  
SO YOU CAN CREATE AND SHARE EXHILARATING AND LUXURIOUS EXPERIENCES WITH FAMILY AND FRIENDS  
BECAUSE ONLY VAIL DELIVERS THE BEST OF MOUNTAIN RECREATION AND VILLAGE SOPHISTICATION IN A UNIQUE CULTURAL ATMOSPHERE

BRAND STORY:

A short form narrative written to help internal stakeholders understand the brand's story, intended to inspire them to become brand ambassadors

FOR MILLIONS OF YEARS, THE AUSTERE BEAUTY OF WHAT IS NOW VAIL SAT PATIENTLY. THROUGH WIND, THROUGH RAIN, THROUGH SUN AND SNOW. SEASON AFTER SEASON, YEAR AFTER YEAR. WAITING.  
  
WAITING FOR SOMEONE TO COME. TO SEE ITS BEAUTY AND TO FLOURISH IN IT.  
  
VAIL WAS FOUNDED ON THE IDEA THAT A PLACE COULD MIRROR THE MAJESTY OF ITS MOUNTAINS. THAT IT COULD MATCH THE EXCELLENCE AND AWE OF WHAT NATURE HAD PROVIDED.  
  
THAT WE COULD CREATE A PLACE TO SATISFY OUR DEEP HUMAN LONGING TO NOT MERELY LIVE, BUT TO FEEL ALIVE. SO WE SCULPTED A MOUNTAIN, ESTABLISHED A VILLAGE, AND CARVED OUT A WAY OF LIFE. A LIFE OF EXHILARATION AND ADVENTURE. OF LUXURY AND WONDER.  
  
FOR IT'S THIS FEELING OF TRUE JOY—OF NOT LIVING, BUT THRIVING—THAT CONNECTS US, BRINGS US TOGETHER, TAKES US NEW PLACES, AND BRINGS US BACK TO THE PLACES WE LOVE.  
  
IT'S WHY WE WORK. IT'S WHY WE PLAY. IT'S WHY WE EXIST.  
  
WE FORGED A MOUNTAIN THAT INSPIRES AWE. SO WE CREATED A MOUNTAIN EXPERIENCE THAT DOES THE SAME. THIS IS A PLACE EACH OF US WAS BORN TO EXPERIENCE.  
  
THIS IS VAIL. AND IT'S LIKE NOTHING ON EARTH.

BRAND VOICE:

SAMPLE HEADLINES:

APRÈS. LIKE NOTHING ON EARTH.  
REVEL. LIKE NOTHING ON EARTH.  
MARVEL. LIKE NOTHING ON EARTH.  
EXHILARATION. LIKE NOTHING ON EARTH.  
EXPLORE. LIKE NOTHING ON EARTH.  
LUXURY. LIKE NOTHING ON EARTH.  
BLISS. LIKE NOTHING ON EARTH.  
WONDER. LIKE NOTHING ON EARTH.  
SPLENDOR. LIKE NOTHING ON EARTH.  
SOAR. LIKE NOTHING ON EARTH.

ADDITIONAL HEADLINES AND BODY COPY:

THE MOUNTAIN

HEADLINE: COME ALIVE.  
BODY COPY: Seven legendary back bowls. 5,000+ skiable acres. A luxurious mountain village. And the feeling of knowing you're truly alive. Explore spring break packages at Vail.com.

THE VILLAGE

HEADLINE: AHH, APRÈS.  
BODY COPY: Technically, après means after. But done right, it's a whole new beginning. Start your après at Vail.com.

ADVENTURE RIDGE

HEADLINE: WINTER'S PLAYGROUND DESERVES A PLAYGROUND ALL ITS OWN.  
BODY COPY: Adventure Ridge. Where wonder and joy comes as naturally as a sunset over the back bowls. Start your adventure at Vail.com.

SKI SCHOOL

HEADLINE: HERE, YOU DON'T JUST EXPERIENCE A MOUNTAIN LIKE NO OTHER, YOU LEARN HOW TO TRULY EXPLORE IT.  
BODY COPY: Find your guide at Vail.com.

GENERAL

HEADLINE: MILLIONS OF YEARS OF GEOLOGY. ALL FOR ONE PERFECT MOMENT.  
THERE'S NOTHING QUITE LIKE THE FEELING OF HAVING IT ALL.  
DISCOVER THE BIRTHPLACE OF AWE.  
PREPARE TO RUN OUT OF ADJECTIVES.  
THERE'S LIVING, AND THERE'S FEELING ALIVE.

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3/22/2019

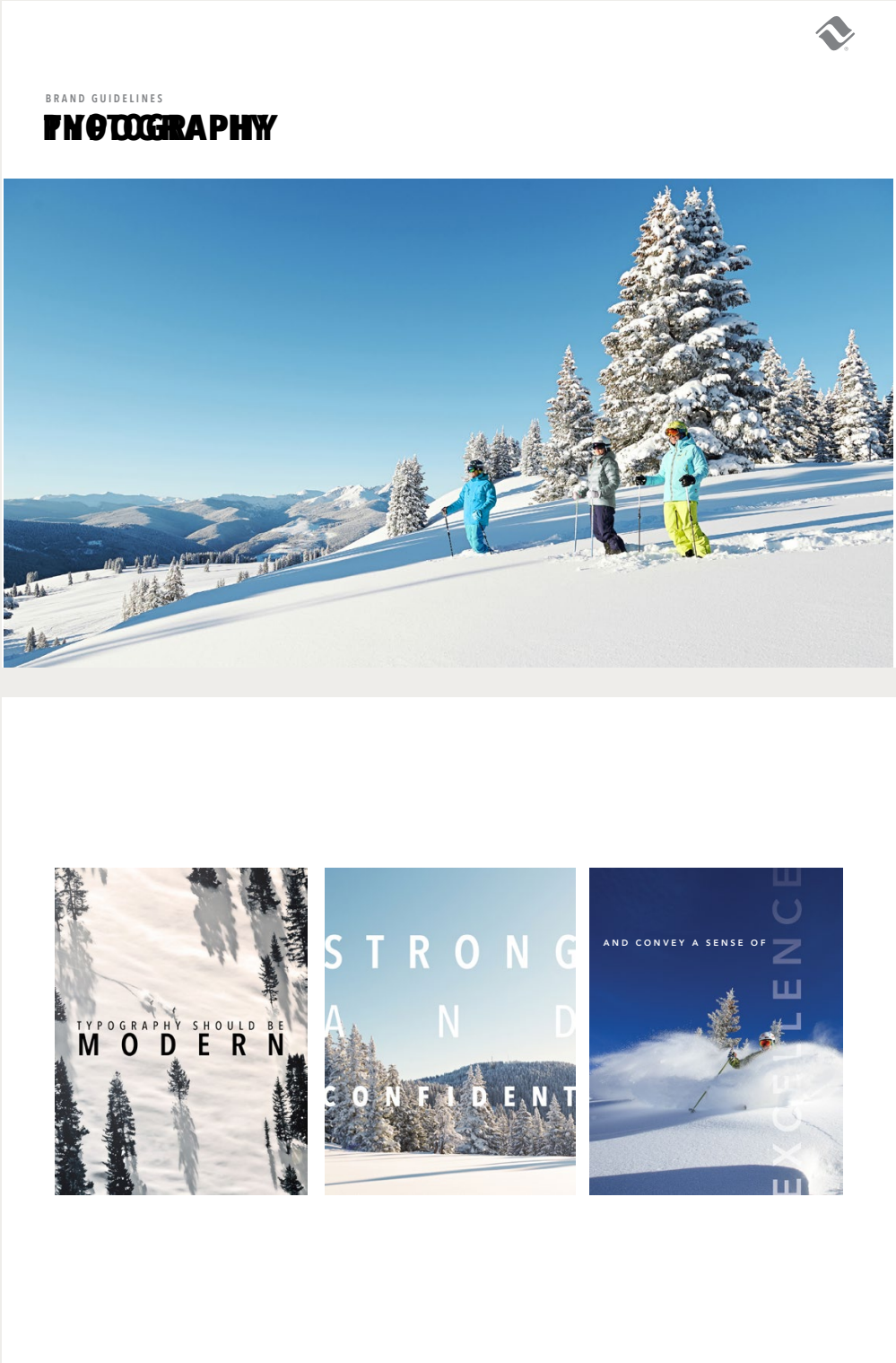
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2.1.

CREATIVE PORTFOLIO

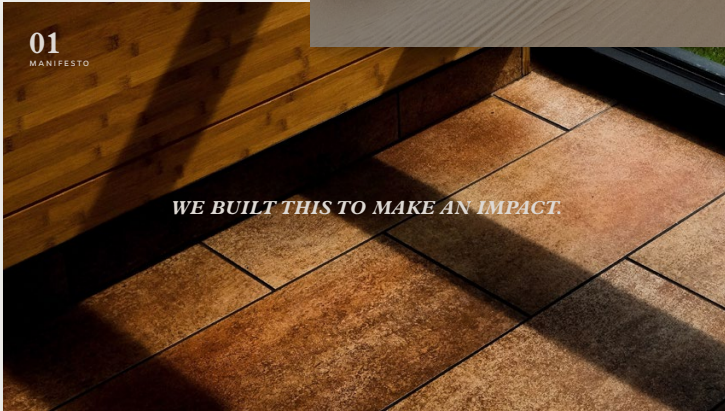
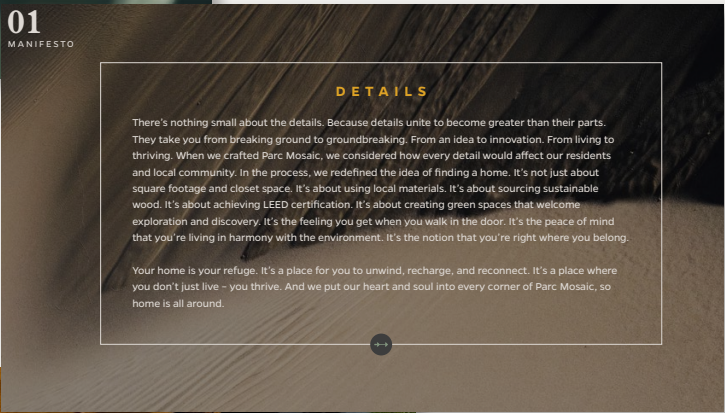


2.1.  
CREATIVE PORTFOLIO

PARC MOSAIC



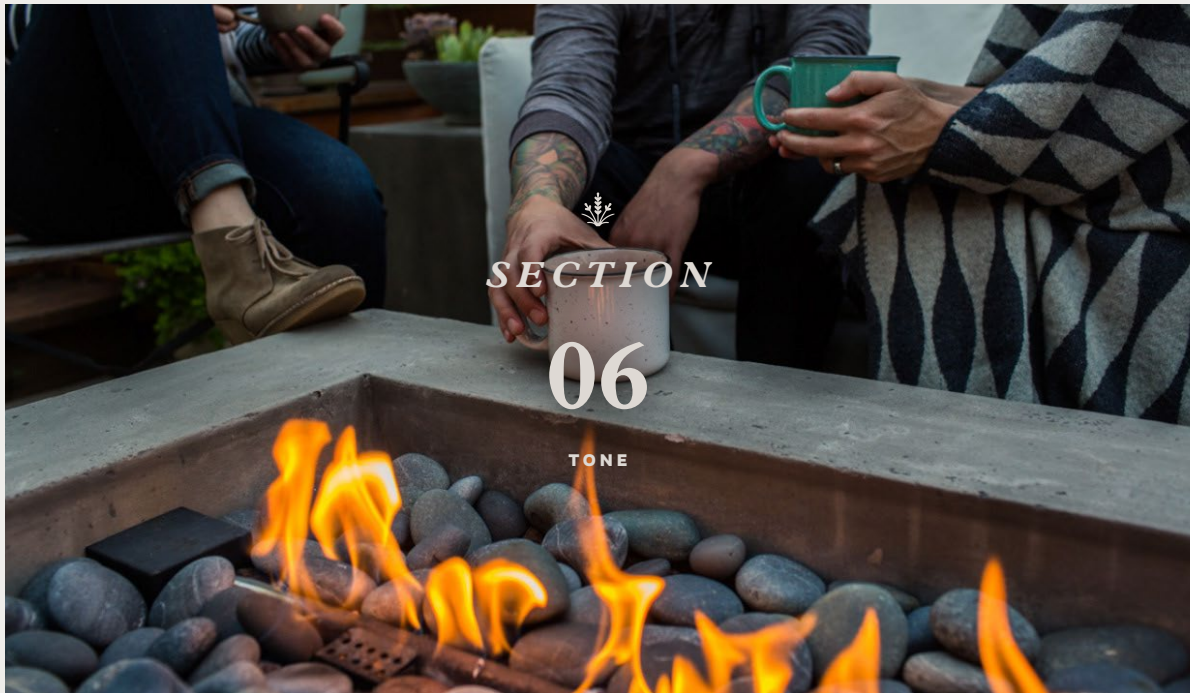
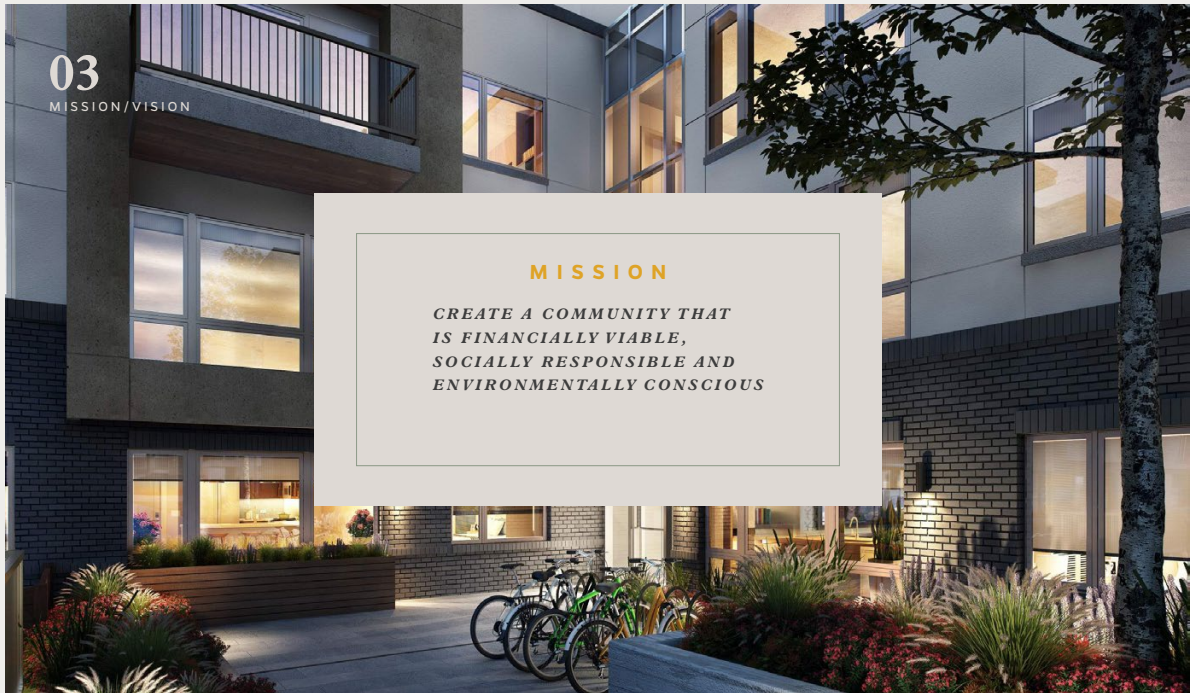
Brand Standards Guide





2.1.

CREATIVE PORTFOLIO





## 06 TONE

These are hypothetical copy examples that embody the tone and personality of our brand.

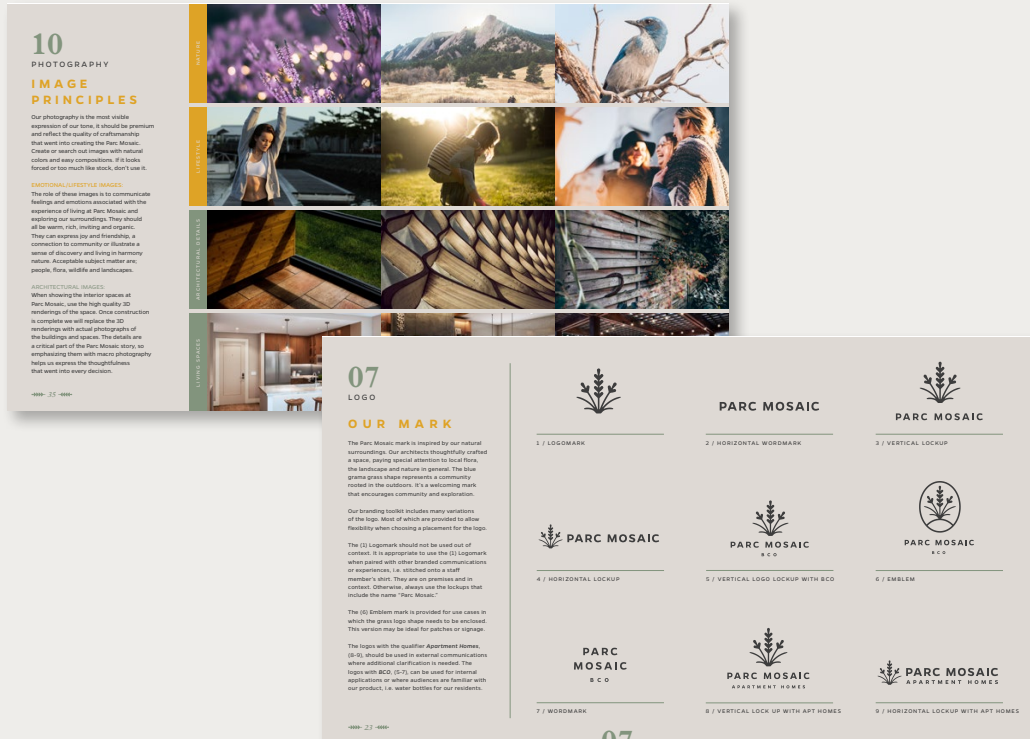
## GROUP HIKE

## RECYCLING CHALLENGE

PROSPECT AD

PROSPECT AD #2

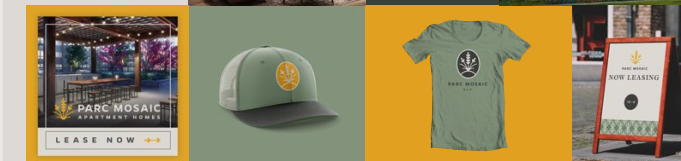
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## 11

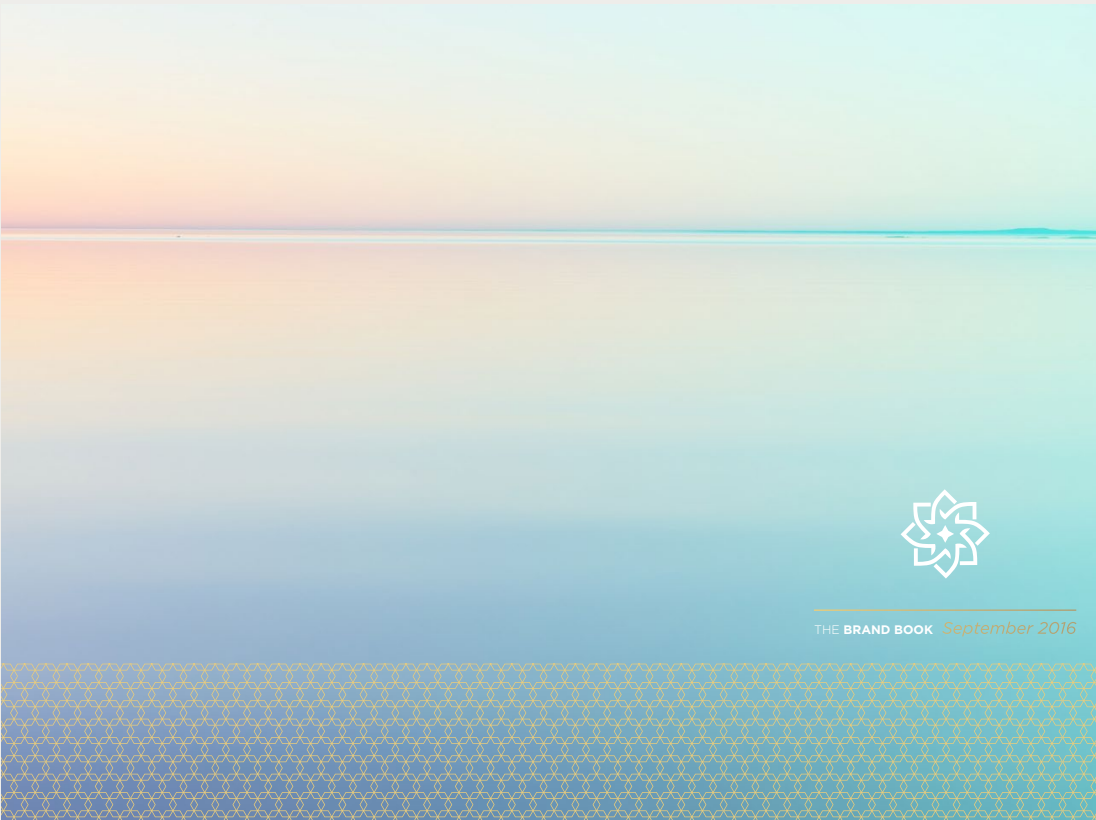
### USE CASE EXAMPLES

These examples illustrate the flexibility of the brand toolkit as applied to various surfaces, situations and environments. As new assets are created, they will be added to this section.

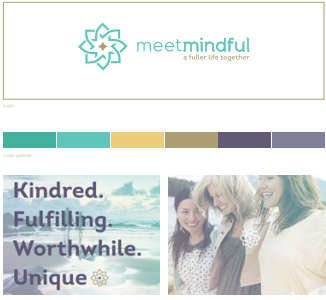
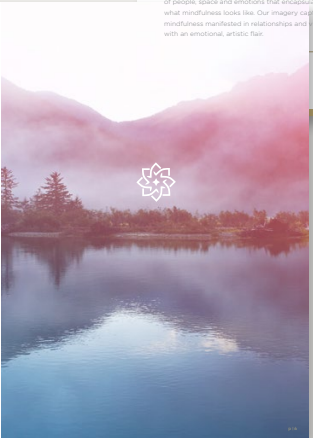
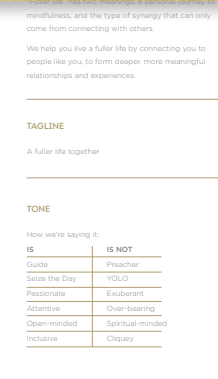
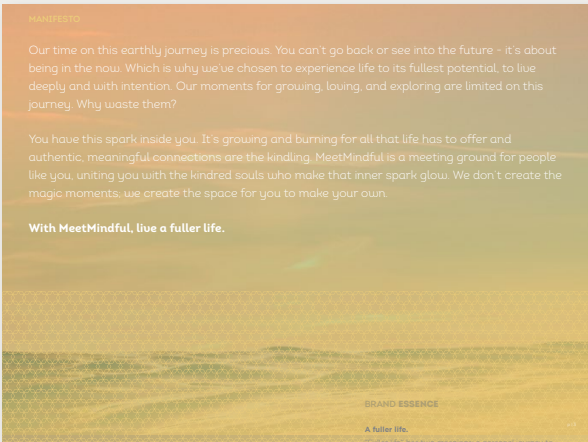


2.1.  
CREATIVE PORTFOLIO

# MEET MINDFUL



Brand Standards Guide




2.1.


CREATIVE PORTFOLIO

COLOR VARIATION (cont'd)

Single Color. No Tagline.










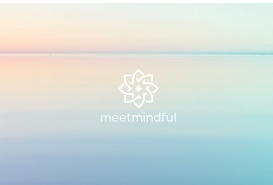


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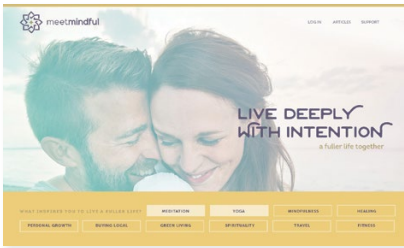


IMAGE PRINCIPLES

We use imagery to tell not only the story of our brand but also the most compelling stories about the lifestyle for which our brand stands. Our visual system utilizes an authentic, raw aesthetic style to capture the essence of the MeetMindful Tribe. Photography is bucketed into three distinct themes: people, emotions, and spaces. These buckets help establish the MeetMindful narrative, and can be used across all communication pieces to inform the brand's identity.

*Image Guidelines:*  
White backgrounds  
Clean, Strong, Bold, Confident.  
Natural Energy  
Color wash on photography



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## 2.1. CREATIVE PORTFOLIO

*d. Provide explanations  
and samples of how  
the team approaches  
group sales marketing  
for a destination or  
travel product.*

# WE KNOW THAT IN ORDER TO BE IN THE CONSIDERATION SET FOR MEETING AND EVENT PLANNERS, WE FIRST HAVE TO CHECK A NUMBER OF BOXES:

- ☒ *an easily accessible destination that offers accommodations to fit any budget*
- ☒ *a wide variety of unique teambuilding opportunities*
- ☒ *exceptional meeting space / venues*
- ☒ *highly responsive and flexible staff*
- ☒ *a safe and controlled environment*



## 2.1. CREATIVE PORTFOLIO

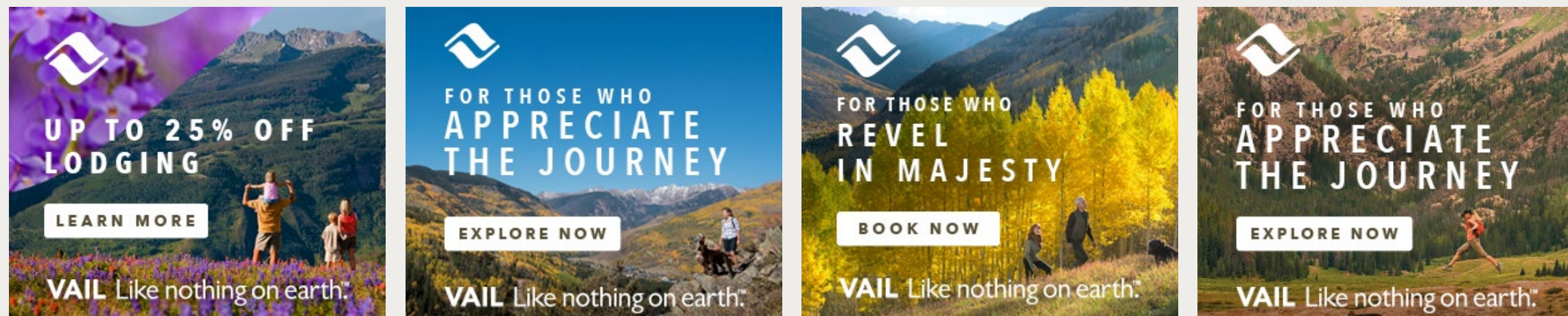
But we also know that many are looking to create unique and memorable experiences and to elevate their meetings or events away from the normal boardroom or ballroom. Our approach is to quickly check the boxes (rational) so that we can focus on the emotional aspects of a planner's decision, leveraging emotive targeted creative that helps planners envision their ideal convention, meeting or event in our location.

As highly skilled storytellers, we are adept at crafting powerful marketing executions that artfully blend rational box-checking information with inspiring creative. In addition, we have a long history of working closely with the Group Sales teams at our destination clients to leverage the creative assets from our brand campaigns to support their specific outreach goals. This includes engaging them early in the creative and communications planning process to identify how, when and where we can dovetail our efforts to maximize impact and ensure messaging and brand unity.

In the following examples, you will see how we worked with the Vail Valley Partnership and Vail's Group Management team to translate the Vail brand into specific group messaging and outreach.



Digital Banners



## 2.2. ACCOUNT MANAGEMENT

*a. Indicate how the team will handle account management of the annual advertising budget, including creative production, digital production, and media placements.*

# WE PRIORITIZE TRUST, TRANSPARENCY AND PARTNERSHIP.

---

These traits are at the core of our client service philosophy, and provide the heartbeat that sustains our client/agency relationships. We hold a high standard for account and project management, ensuring our teams are well-staffed, well-trained and well-organized in order to produce projects that are on-strategy, on-time and on-budget. As part of our onboarding process we'll collaborate with the GFLCVB team, as well as other relevant marketing partners, to align on systems and methods of communication. And throughout our partnership we'll always keep your interests – meeting expectations, budgets and timelines – at the forefront by maintaining open, honest, and frequent communication.

---



## 2.2. ACCOUNT MANAGEMENT

### ***WHAT DOES THIS LOOK LIKE DAY-TO-DAY?***

Our account management team will work with you at the outset of each initiative, asking the right questions to ensure we're aligned on input, strategy, scope of work, timelines and budgets. We'll start by setting clear expectations upfront, and then partner that with day-to-day project management tools, systems and processes to keep us on track with creative production, digital production and media placements.

Our strategy, media, production, digital and project management teams are subject matter experts who will search for the highest-quality and most cost-efficient vendors to subcontract with in order to execute the work, and meet the specifications and parameters of each individual project. This includes researching and thoroughly vetting all vendors through the procurement process and managing execution of the project from hand-off to final delivery. Our team is well versed and extremely savvy in negotiating and managing relationships with sub-contracted vendors to maximize your investment and provide the greatest value for every dollar spent. We'll leverage our relationships with expert consultants and research vendors to develop and implement innovative and effective solutions, partner with top media outlets to find the right communications channel, and source top-tier talent in broadcast, video, animation, photography, illustration, digital development, printing and fulfillment to ensure excellence in production quality and tactical execution. And finally, we'll never enlist an outside partner to engage with us on the GFLCVB business without including you in the process and securing your approval on all media flowcharts, production estimates, research costs, and other sub-contractor expenses prior to purchases.

**Throughout every project we'll maintain mutually clear expectations via:**

- + Daily check-ins for hot items
- + Weekly status calls/meetings
- + Regular in-person meetings with the GFLCVB internal marketing team, stakeholders, boards and committees
- + Highly responsive email and phone communications
- + Detailed project schedules
- + Clear approval processes
- + Action reports and recaps of next steps after each project milestone
- + Daily account and project management using Workamajig (cloud-based, real-time software system to manage all schedules, assignments, resourcing, time tracking, budgets and billing)
- + Use of additional project management tools such as Basecamp and Google Drive to share information and keep projects flowing smoothly through the agency and with our clients
- + Monthly billing reports with required back-up
- + Quarterly budget to actuals tracking reports
- + Use of Strata software for all broadcast media buying, placement and reconciliation
- + Media buy audits and proof of performance
- + Monthly analytics reporting and recommendations for optimization
- + Additional real-time analytics and measurement reporting through Datorama, a data management platform which aggregates data points across channels (including website stats, paid advertising, social platforms, sales and eCRM data)

***TOGETHER, WE'LL ENSURE THAT WE'RE CONTINUALLY MOVING IN THE SAME DIRECTION, PROVIDING PROACTIVE THINKING, RESPONSIVE ACTION AND THE UTMOST ACCOUNTABILITY THROUGHOUT EVERY PART OF OUR PROCESS – FROM STRATEGY, TO CREATIVE DEVELOPMENT, TO PRODUCTION, LAUNCH AND EVALUATION.***

## 2.2. ACCOUNT MANAGEMENT

*b. Indicate research, overall business intelligence and tourism industry knowledge specific to destination marketing organizations (DMOs) or a tourism product.*

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*At Cactus we believe in insight-driven strategies, strategic-driven creative and creative-driven results. Our approach begins with the philosophy that every project, every campaign, and every tactic starts with a solid understanding of three key areas: your target audiences; current industry and competitive trends; and your business and brand. As part of this approach, we're committed to not only staying current on the latest trends in consumer behavior and the travel and tourism industry, but also to leveraging our insights, experience, and technological innovation to identify the forces that will continue to shape the industry in the future.*

***Here are the trends we believe will impact the GFLCVB in 2019 and beyond:***

---



## 2.2. ACCOUNT MANAGEMENT

# SHIFTING PATH TO PURCHASE

It's no surprise that the rapid rise in mobile, digital, and social media – as well as differences in generations and life stages – has had a tremendous impact on travel and tourism. These shifts have fractured the way consumers engage in their travel inspiration and decision-making processes. Today, a person is just as likely to find travel inspiration from an influencer post shared on Instagram or Weibo as they are from reading a story in USA Today's travel section. To explore a destination further, they might search YouTube videos, engage with a Chabot, or read a review on TripAdvisor. According to Millward Brown, travelers visit up to 40 different websites in the six weeks leading up to booking a trip. When we add in subsequent phases of intent, such as research and exploration, Google/Ipsos found that people visit up to 380 different web pages during the entire process. It's clear that the sheer number of channels that travel brands need to consider in regard to when and where to connect with their travel prospect has become immense.

Throughout the travel decision-making cycle, consumers expect to engage on their terms – from any device, on any platform, at any time. Tourism organizations can no longer rely on a predictable funnel for consumer engagement, and data from each phase of the traveler decision process needs to be carefully reviewed and considered. According to Phocuswright, 57 percent of travelers feel that brands should tailor their information based on their preferences or past behavior.

Destination marketing organizations (DMOs) face particular challenges in this area – they often do not have a system for central reservations where the majority of bookings occur, meaning actionable conversion data can be hard to come by. This can present challenges in communicating the return on investment and economic impact of a DMO's activities, and also reduces the effectiveness of dynamic optimization efforts. Innovative partners like Adara Impact can help address this on the front-end through a co-op of opted-in lodging, air, and car rental partners, and machine learning can leverage the power of big data to ensure personalized experiences

throughout the travel decision-making cycle. However, to truly build a comprehensive data model, DMOs often have to build strategic alliances and partnerships to monitor and improve the traveler experience at every phase, from inspiration and booking to experience and sharing.

**Inspiration:** Inspiration for travel can be triggered at any time, and comes largely from visual media such as videos and photos. According to Ipsos, 65 percent of leisure travelers are inspired by online sources, most notably through social/video sites and search, while 42 percent of travelers are inspired to travel by YouTube content.

For DMOs, bringing the destination brand to life at the top of the funnel is crucial. While many lower-funnel partners are focused more on experiences, dining, and places to stay, the DMO's marketing efforts need to help the brand stand out in the highly competitive field of travel experiences. To accomplish this, the DMO needs to craft a brand that simultaneously resonates with target audiences, while remaining broad enough to represent the entire tourism product. For many DMOs, this leads to an

## 2.2. ACCOUNT MANAGEMENT

“everything to everyone” approach to marketing that fails to connect with consumers’ core travel motivations. But the most successful DMOs are able to connect the fundamental and unique characteristics of the communities they represent, to the travel dreams and aspirations of their target markets.

**Research:** According to TripAdvisor, people are turning to travel review websites (69 percent) more than personal recommendations from family and friends (43 percent). Why? Because prospective visitors have thousands of reviews at their fingertips and the opinions of thousands overshadow the handful of experiences that can be offered by friends and family. Photos, ratings, and reviews help travelers understand Fort Lauderdale through the experiences of others, and further spur their desire to explore this evolving community.

For DMOs, this can also present a unique challenge. A destination’s brand identity is no longer able to be shaped exclusively by the brand itself; it’s being shaped by a broad mix of variables – everything from user-generated content and reviews, to marketing, travel infrastructure, and even the inclusiveness or exclusiveness of a community’s policies and laws.

Driven by Millennials, travelers today are seeking authentic and local experiences. As a result, many DMOs are focusing an increasing amount of effort and attention on cultivating the tourism products that are in demand for their target audiences. In essence, they are shifting to become Destination Marketing and Management Organizations. At the same time, many travelers are asking the question “is this a place where I belong and will feel welcomed?” For DMOs, this presents a unique opportunity to connect with mindful travelers to ensure they feel welcomed to a destination via everything from marketing and PR to their actual experience. This is an area where GFLCVB is already ahead of the curve.

Greater Fort Lauderdale has a prominent and long-standing national reputation for championing and embracing the LGBT+ community. As Florida’s LGBT+ capital, Greater Fort Lauderdale is the proud home to hundreds of LGBT-owned and operated businesses, and is the host of the largest trans conference in North America. Members of the LGBT+ community consider numerous factors and resources when choosing a travel destination, which include, among others, the values of: inclusiveness, family, fun, and adventure, which are inherent within the Greater Fort Lauderdale area.

**Booking:** In 2018, 45 percent of online travel bookings were via mobile devices. As people become more comfortable booking on mobile devices, on-the-go booking will increasingly become the norm. Rather than having to plan the trip’s itinerary beforehand, consumers will be able to evolve their trip plans and book their activities from wherever they are, allowing them to discover more on the fly. This means a brand’s job isn’t done when the consumer first books their vacation. Destination brands must have a robust social and mobile presence to support the visitor throughout the booking and travel portions of their vacations.

**Traveling:** Travelers are always connected, packing an average of four web-enabled devices when they travel. They bring tablets, laptops, and smartphones to share their experiences on social media, find the cheapest fuel en route, book last-minute hotel rooms or activities, find Wi-Fi hotspots, and even explore the inside of a museum or airport. In fact, according to Google, 70 percent of travelers say they always use their smart phone when traveling.

Travel-related searches with the terms “tonight” or “today” have jumped 150 percent over the past two years, and with NFC payment options (tap to pay) like GooglePay and

## 2.2. ACCOUNT MANAGEMENT

ApplePay, many travelers are not only making plans in the moment, they're also paying, checking into hotels, and even unlocking their hotel rooms with their mobile devices. Mobile device usage is changing how people explore and experience a destination, and it's also creating new windows of opportunity for engagement to drive discovery and last-minute inspiration.

**Sharing:** Today, travel experiences have become a form of social currency, with posts garnering likes, comments, and admiration from individuals' social networks. We know that 50 percent of U.S. travelers who access the Internet via mobile use it to update their social network with trip-related posts which, in turn, serve as inspiration and a planning tool for others.

With the shifts in how consumers receive and process travel information – along with today's dense and fragmented media environment – consumers have in many ways taken control and ultimate ownership of brands. Brands are no longer able to have a single, one-way, controlled conversation with the consumer. As a result, consumers are able to interpret a brand the way they see it. For a DMO, this presents a big opportunity to provide value to all tourism stakeholders by providing community trainings on everything from how to leverage and participate in the destination campaign, to best practices for influencer and social media engagement.

---

*“Driven by Millennials, travelers today are seeking authentic and local experiences. As a result, many DMOs are focusing an increasing amount of effort and attention on cultivating the tourism products that are in demand for their target audiences. In essence, they are shifting to become Destination Marketing and Management Organizations.”*

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**2.3****MEDIA PLANNING & BUYING**

# WE'LL MAKE SURE EVERY DOLLAR YOU SPEND DELIVERS IMPACT.

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*As one of the largest independent media planning and buying agencies in Colorado, we don't just recognize what it means to be good stewards of public funds, we practice it. When it comes to maximizing media investments, our media planners and buyers are tenacious, and our communications strategists are some of the very best in the travel and tourism game. In addition to our experienced, top-notch talent, we also utilize proven analytical tools and processes to inform our team and our clients of the impact of every media dollar spent. We're able to review and evaluate performance in real time, giving us the agile ability to adjust and optimize on the fly, ensuring that we're delivering the greatest return on your advertising spend.*

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## 2.3

### MEDIA PLANNING & BUYING

*a. Indicate how the team can leverage value-added opportunities.*

Cactus' media communications team is extensively experienced, planning and purchasing millions of dollars of media each year, nationwide. Our planners and buyers work hard to leverage opportunities and negotiate added-value with every deal made – regularly researching, analyzing, planning, and placing buys across all paid media channels.

At Cactus, we leverage added-value opportunities for our clients in a variety of ways, including in the form of: bonus spots or impressions; premium positioning (this includes not just premium placements in print, but also first-in-pod spot placement for TV, cable and radio); additional savings beyond typical negotiations; special content alignment where applicable; participation in events or promotions held by our vendors; and on-air talent partnerships, which add an organic media component to our clients' campaigns.

Our team's strong negotiating power results in added-value and cost-savings averages of 30-50 percent for our clients. We skillfully employ every aspect of paid media to efficiently and effectively maximize budgets, including the latest in digital, social, programmatic, immersive digital, dynamic creative, and AI-driven approaches.

## 2.3

### MEDIA PLANNING & BUYING

*b. Indicate how the team would handle industry co-op advertising opportunities and leverage media buys and sponsorships.*

Co-op advertising opportunities are an effective way for DMOs to increase exposure to their target audience(s), while also being efficient with their budget. County DMOs can participate in co-ops offered at the state level, or offer a county-level co-op program, which is meant to include community stakeholders (such as local lodging, attraction, or restaurant partners) in order to leverage a larger combined media or sponsorship budget.

If the co-op offering lies at the state-level, Cactus would evaluate the program(s) made available by the state to help determine the value of the offering(s) and assist in any application process as necessary. This assistance could include providing an overarching approach along with details as to how the co-op funds would be spent, or even providing an anticipated return on ad spend. If state co-op funds are granted, Cactus would then help manage any media evaluation and creative needs moving forward.

At the county-level, when offering and managing a co-op program, Cactus would work with the GFLCVB to determine the overall goals and scope of the co-op campaign and would manage the co-op media planning and buying on behalf of the DMO and the co-op. Centralizing negotiations through Cactus allows for maximum leverage of the combined media or sponsorship budget, thus yielding the most efficient buy for the co-op. From there, Cactus would work with the GFLCVB to determine how best to approach the resell of the co-op space to community partners. In some cases, the client will lead the resell of co-op media space, as they may hold the greatest understanding of the breadth of needs of the community partners. In other cases, the media partner may assist in reselling the space to local partners, as they often have preexisting relationships with the community partners. In either case, Cactus would provide support by coordinating co-op partners, as well as providing recommendations for how best to allocate media space and effectively message to the audience.

3.

# PAST PERFORMANCE EVIDENCE OF KNOWLEDGE AND EXPERIENCE

**3.**

**PAST PERFORMANCE EVIDENCE  
OF KNOWLEDGE AND EXPERTISE**



# VAIL LOCAL MARKETING DISTRICT

## UNIFYING A BRAND YEAR-ROUND

*3. Describe prime Vendor's experience on projects of similar nature, scope and duration, along with evidence of satisfactory completion, both on time and within budget, for the past five years. Provide a minimum of three projects with references.*

**Client Reference:**

**MIA VLAAR**

Economic Development Director  
970.479.2454  
mvlaar@vailgov.com

***Please see Vendor Reference  
Verification Form for  
complete information.***

**Key Professionals Involved:**

- + Ainslie Fortune, VP, Account Service
- + Mike Lee, VP, Strategy
- + Molly Katz, Account Planning Director
- + Jeff Strahl, Creative Director
- + Sarah Berkheimer, Design Director
- + Lisa Hubbard, Media Director
- + Katie Harker, Digital Media Planner & Buyer
- + Lisa Van Someren, VP, Creative Operations
- + Brooke Woodruff, Production Director
- + Hannah Green, Account Manager

**Scope of Services Provided:**

- + General Account & Project Management; Partner Oversight
- + Research, Insights & Planning
- + Brand Architecture
- + Creative Development & Production
- + Communications Strategy & Planning
- + Media Planning, Buying & Reporting

**Account Processes:**

- + Contract Structure: Agency of Record
- + Billing: Monthly
- + Communication Protocols: Weekly Status Calls, Monthly Board Meeting, Daily Email/Phone



### 3. PAST PERFORMANCE EVIDENCE OF KNOWLEDGE AND EXPERTISE

#### SITUATION

The Vail Local Marketing District Advisory Council (VLMDAC) is led by a nine-person board, has a comparable marketing budget to the GFLCVB, and reports directly to the Vail Town Council. The VLMDAC approached Cactus to create continuity between the historically disparate summer, shoulder-season and winter marketing efforts.

#### CHALLENGE

While creating this continuity was a seemingly simple request on its surface, the challenge came from the reality that entirely different marketing teams with entirely different objectives were responsible for the development of Vail's spring, summer, fall and winter marketing programs. In order to be successful, Cactus would need to find the unifying elements that could bring these distinct seasons together and ensure that the resulting platform would resonate with all of Vail's destination tourist audiences.

#### INSIGHT

We began by collecting primary and secondary research specific to Vail, as well as for travel in general. In order to develop deep understanding of the brand across a variety of viewpoints, the primary research methodology included key stakeholder interviews and collaborative work sessions, as well as additional consumer, brand and trend investigations. Through this research we discovered that:

- + The Vail brand had strong awareness and was top-of-mind as a winter destination, but lacked the same recognition for the summer and shoulder seasons
- + Vail was seen as a leader for mountain destination vacations
- + Target audiences were nearly identical across seasons
- + Regardless of season, consumers recognized Vail as a singular destination, and thus a singular platform should unite the seasons

Armed with these insights we developed personas that would be receptive to discovering all of the ways in which Vail is a destination like nothing on earth, regardless of the time of year. Using MRI and Mosaics data in combination with demographic data, travel motivators and buying behaviors, we identified three robust target audience personas to whom we could market: Dynamic Families, Active Professionals and Super Boomers.

#### SOLUTION

With our insights and audience personas in-hand, we developed campaigns that invited like-minded consumers to join us in Vail. We knew the campaigns needed to be flexible, as our messaging had to communicate a multitude of activities and events, while simultaneously resonating with each persona's emotional motivators.

2016's 'Step In' campaign was developed to lean in to the existing Vail winter positioning of Like Nothing on Earth, and leverage the mountain town's existing brand equity by elevating the logo mark as a central element within creative executions and using the blue and white color palette for which Vail has long been known.

Then, in the spring of 2017, we introduced 'For Those Who', a campaign that continued to leverage the previous season's fundamental elements, but also allowed each of our target audiences to see themselves as among those who uniquely belong in Vail.

Most recently, in addition to our ongoing persona efforts, we developed a campaign layer that focused specifically on destination families with teens as a way to further boost occupancy and length of stay, and focused on those individuals who reported higher Net Promoter Score and that had a targetable audience of children ages 13 to 17 who help in travel decision making. This hyper-targeted effort focused on coming-of-age messages that resonate with both parents and their teen children alike.

### **3. PAST PERFORMANCE EVIDENCE OF KNOWLEDGE AND EXPERTISE**

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#### ***MEDIA STRATEGY***

Over the past three years, our approach has included an integrated, national media campaign inclusive of television/video, out-of-home, digital, social media, public relations and influencer efforts. Media is selected and placements are customized to suit each of our audiences, delivering a branded experience when and where consumers are identified as being most receptive to Vail messaging.

With a limited selling season, it is imperative that our media tactics work as hard as possible for the short time they are in the market. Therefore, we employed Datorama, a results aggregation tool that gives us the ability to monitor results on a weekly basis and to optimize the campaign by making strategic enhancements and tactical shifts in real time.

#### ***INTERNATIONAL***

The campaign included efforts for both the U.S. domestic audience as well as international markets including Mexico. For the Mexico effort, the campaign was transcreated and used an open and inviting tone to ensure that while the political climate shifted, these travelers always felt welcome in Vail.

#### ***CO-OP***

Over the course of the relationship, Cactus has worked closely with both group sales and event producers to extend our paid, earned and owned efforts. Our entire media ecosystem was designed on a co-op model, partnering with signature events throughout the spring, summer and fall travel seasons. The creative executions were built to simultaneously drive brand awareness among our target audiences, while also promoting each event to their relevant markets during the appropriate time periods. Our co-op model was mapped to the traveler consideration journeys of our target audiences to deliver not only “Why Vail,” but also “Why Vail Now.” This flexible co-op model enabled us to leverage the destination brand and significantly improve the efficiency of our ad spend while also delivering far greater reach and impact for our co-op partners.

In addition to our co-op model, we partnered with group sales to identify and target groups and events that would align with the teen strategy. Along with unified messaging and creative assets, this tight collaboration among the marketing, groups and events teams resulted in driving success across all metrics. By integrating our group sales and marketing efforts into our broader brand campaign, which in turn was crafted to create destination cohesion across all seasons and leverage the equity of the iconic Vail ski experience, we effectively elevated the traditional slower seasons to become major economic drivers for the Vail Valley.

**3.**  
**PAST PERFORMANCE EVIDENCE**  
**OF KNOWLEDGE AND EXPERTISE**

# RESULTS

By working closely with and coordinating efforts between VLMDAC’s existing partner agencies, Cactus has successfully developed and implemented three years of cohesive tactical plans and compelling, emotive creative assets that have delivered on the VLMDAC’s goals and objectives. Throughout this time, we’ve also attended and led monthly board presentations to share progress and successes at every step of the process. And the results we’ve achieved have been phenomenal, exceeding all expectations.

**Summer 2016**

- + 45.2 Million Impressions Served
- + Sales Tax Revenue 7%+
- + Destination Occupancy 5%+
- + Group Occupancy 30%+
- + Net Promoter Score 80

**Summer 2017**

- + Average Daily Rate 14%+
- + Sales Tax Revenue 2.8%+
- + 33.2 Million Digital Impressions Delivered
- + 2017 Digital KPIs Surpassed Industry and 2016 Performance Benchmark

**Summer 2018**

- + Total Average Daily Rate 1.32%+ and is 3%+ industry average
- + FIT Average Daily Rate 2.5%+
- + 61 Million Digital Impressions Delivered
- + 2018 Digital KPIs Surpassed Industry and 2016 and 2017 Performance Benchmarks
- + 13%+ Year-Over-Year Sales Tax Revenue
- + 19%+ Year-Over-Year Lodging tax revenue
- + Occupancy is 1%+ from industry average

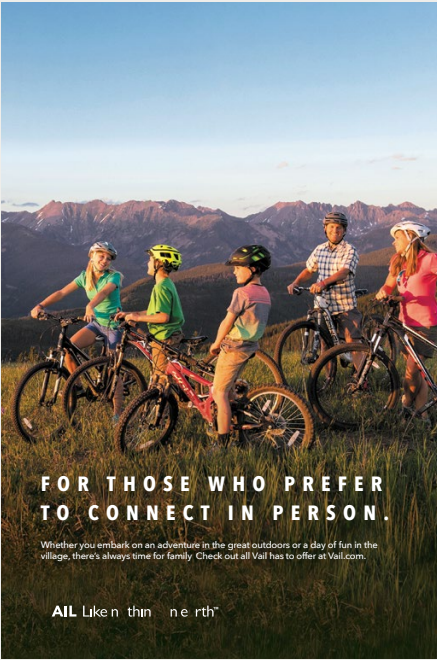


3.

PAST PERFORMANCE EVIDENCE  
OF KNOWLEDGE AND EXPERTISE



Out-of-Home



Print Ads



Social Posts



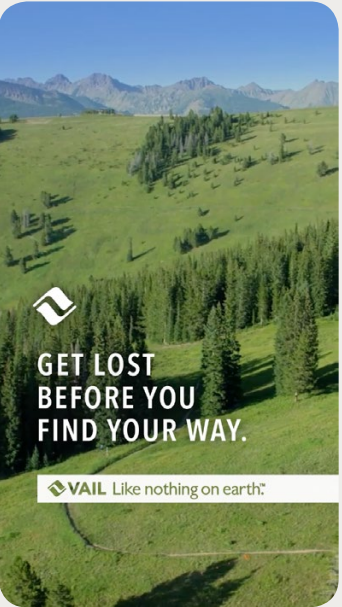
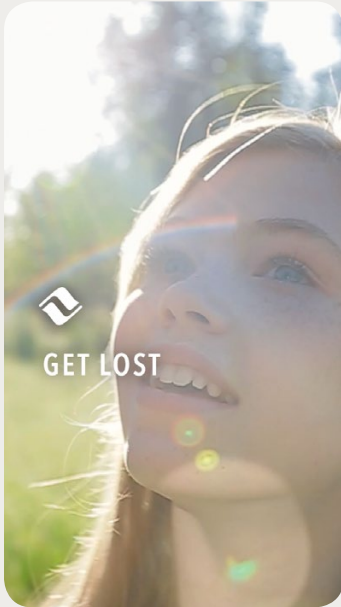
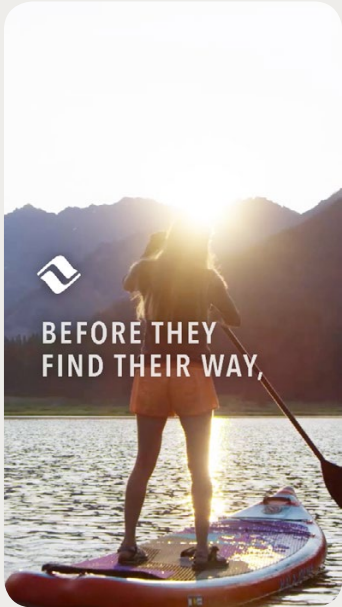
**3.**  
**PAST PERFORMANCE EVIDENCE**  
**OF KNOWLEDGE AND EXPERTISE**



Print Ad



Print Ads & Social Posts



Social Videos



3.

**PAST PERFORMANCE EVIDENCE  
OF KNOWLEDGE AND EXPERTISE**



# COMMUNITYAMERICA CREDIT UNION

## USING SPONSORSHIP TO DRIVE BRAND AND BUSINESS GROWTH

**Client Reference:**

**MATT JOHNSON**

VP, Marketing  
913.905.8219  
mcjohnson@cacu.com

***Please see Vendor Reference  
Verification Form for  
complete information.***

**Key Professionals Involved:**

- + Ainslie Fortune, VP, Account Service
- + Brian Watson, VP, Executive Creative Director
- + Mike Lee, VP, Strategy
- + Molly Katz, Account Planning Director
- + Andrew Baker, Creative Technology Director
- + Jamie Lamora, Project Management Director
- + Jon Barnett, Account Director
- + Hannah Green, Account Manager
- + Lisa Hubbard, Media Director
- + Katie Harker, Digital Media Planner & Buyer

**Scope of Services Provided:**

- + General Account & Project Management
- + Research, Insights & Planning
- + Brand Strategy & Positioning
- + Communications Strategy & Planning
- + Media Planning, Buying & Reporting
- + Digital / Web
- + Creative Development & Production
- + Multi-Channel, Integrated Campaigns  
including paid media, in-branch materials,  
corporate sponsorships, and social media  
strategy and content.

**Account Processes:**

- + Contract Structure: Agency of Record
- + Billing: Monthly
- + Communication Protocols: Weekly Status  
Calls, Daily Email/Phone

### **3.**

## **PAST PERFORMANCE EVIDENCE OF KNOWLEDGE AND EXPERTISE**

### **SITUATION**

CommunityAmerica Credit Union has long been a staple of the Kansas City community. However, prior to hiring Cactus as agency of record two years ago, brand awareness had plateaued, leading to sluggish membership growth. CommunityAmerica was also beginning its first year as the Official Banking Partner of the Kansas City Chiefs and was poised to launch a new product, Chiefs Checking. While not tourism related, this client is of similar size and scope to Broward County.

### **CHALLENGE**

Leverage the new sponsorship, and the associated Chiefs Checking product, to drive increased brand awareness, positive brand perception and significant growth in new member acquisition – primarily by gaining new checking accounts. It was no small feat, since we also knew that in order to acquire new members, we often had to convince Kansas Citians to switch financial providers.

### **INSIGHT**

We conducted primary and secondary research to better understand Kansas Citians and the relationships they hold with their banks and with their beloved Kansas City Chiefs. Through our research, we realized Chiefs fans are typically younger, wealthier and more educated than the average Kansas City adult. We also found that they value local businesses and find comfort in a personal relationship.

It was one shared value though, regardless of demographics, that would become the genesis for our marketing strategy: KC pride. Kansas Citians exude an extraordinarily deep pride for their city, their football team and their local institutions. As a purely local, member-owned credit union, CommunityAmerica not only shares this same KC pride, but the organization's sole reason for being is to serve the community it loves. By strongly connecting the CommunityAmerica brand to one of the most visceral aspects of KC pride, Chiefs fandom, we had the perfect strategic platform from which we could begin to tell the brand's story in a meaningful way.

### **3. PAST PERFORMANCE EVIDENCE OF KNOWLEDGE AND EXPERTISE**

#### **SOLUTION**

By identifying the simple, insightful and relevant truth that exists at CommunityAmerica's core, we developed an entirely new brand platform: WE KC. This platform enabled CommunityAmerica to more effectively connect with their audiences about who they are, what they offer, and why Kansas Citians should care.

In year one, our creative needed to showcase in-branch retail, ensuring that there was no mistaking CommunityAmerica as a local financial institution. The creative sought to illustrate CommunityAmerica's shared commitment to the Chiefs and greater Kansas City community, as embodied through its Chiefs sponsorship and marquee checking product. As the campaign evolved in year two, we enlisted a well-known superstar in Patrick Mahomes to help amplify our message, leveraging CommunityAmerica's scale and presence as the Official Banking Partner of the Chiefs to make an emotional connection through a very functional product. The campaigns have quickly created new momentum for the CommunityAmerica brand as they humorously expressed CommunityAmerica's shared bond of Chiefs fandom with all Kansas Citians.

The integrated campaigns blanketed Kansas City – bringing the CommunityAmerica brand to life through a combination of high reach awareness tactics (TV, out-of-home, radio, digital video and native placements), lower-funnel acquisition tactics (programmatic digital display, website takeovers, paid social and email marketing), and experiential activations at Arrowhead Stadium and inside CommunityAmerica branch locations.

As consumers moved through the marketing funnel, our campaign's messaging and placements became more focused and informed, having leveraged tools such as MRI, SRDS and Kantar to analyze consumer behavior and develop a seamless and optimal communications strategy. Knowing that 73 percent of Kansas Citians report having recently watched, listened to or attended a Chiefs game, we emphasized targeting Chiefs fans with product-centric messages that gave the campaign strong visibility throughout the region. And, having pre-determined KPIs that would effectively measure media performance and consumer behavior, tracking users from awareness to conversion, we employed Datorama, a data aggregation tool, to analyze the entirety of our marketing efforts and to inform real-time optimizations to our approach throughout the life of the campaign.



### 3. **PAST PERFORMANCE EVIDENCE OF KNOWLEDGE AND EXPERTISE**

## RESULTS

By meaningfully connecting CommunityAmerica to the people they serve, we've generated brand excitement for the new Chiefs Checking product that's resulted in record new membership acquisition.

#### **Our campaign helped to significantly grow CommunityAmerica's member base:**

- + Surpassed their high-end "reach" goal of 22,000 new checking accounts, adding 23,572 new accounts in 2017
- + Posted a record-breaking 27% year-over-year increase in new member growth, nearly 7x the rate of growth for credit unions
- + 11 of the 12 months in 2017 set records for the number of new checking accounts acquired

#### **Our campaign helped drive bottom-line results:**

- + Revenue increased by \$5.88 million

#### **Our digital placements drove action:**

- + 38% increase in first-time website visitors
- + 12.5% uptick in overall website sessions
- + .21% click-through-rate over the campaign period, nearly double the industry benchmark
- + 50% increase in conversions during the campaign period compared to the four months prior to campaign launch
- + In accordance with a strategic increase in the reach and frequency of our campaign's TV spots during Chiefs games, 75% of all game-day traffic to CommunityAmerica.com came from organic search channels

3.

PAST PERFORMANCE EVIDENCE  
OF KNOWLEDGE AND EXPERTISE



Out-of-Home



In-Stadium Promotions



Digital Banners

In-Stadium Display



**3.**  
**PAST PERFORMANCE EVIDENCE**  
**OF KNOWLEDGE AND EXPERTISE**



Out-of-Home



Out-of-Home



Digital Banner



Print Ad



**3.**  
**PAST PERFORMANCE EVIDENCE**  
**OF KNOWLEDGE AND EXPERTISE**



CommunityAmerica Credit Union TV Spot #1 [VIEW](#)



CommunityAmerica Credit Union TV Spot #2 [VIEW](#)



CommunityAmerica Credit Union TV Spot #3 [VIEW](#)



CommunityAmerica Credit Union TV Spot #4 [VIEW](#)



CommunityAmerica Credit Union "Closer to the Game" TV Spot [VIEW](#)





3.

**PAST PERFORMANCE EVIDENCE  
OF KNOWLEDGE AND EXPERTISE**



# COLORADO LOTTERY

**EXPECT THE UNEXPECTED**

**Client Reference:**

**CHRISTIAN HAWLEY**

Advertising Manager  
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Christian.hawley@state.co.us

***Please see Vendor Reference  
Verification Form for  
complete information.***

**Key Professionals Involved:**

- + Ainslie Fortune, VP, Account Service
- + Mike Lee, VP, Strategy
- + Molly Katz, Account Planning Director
- + Andrew Baker, Creative Technology Director
- + Jamie Lamora, Project Management Director
- + Summer Duncan, Account Director
- + Lisa Hubbard, Media Director
- + Katie Harker, Digital Media Planner & Buyer

**Scope of Services Provided:**

- + General Account & Project Management
- + Research, Insights & Planning
- + Brand Strategy & Positioning
- + Communications Strategy & Planning
- + Media Planning, Buying & Reporting
- + Digital / Web / Apps / Games
- + Creative Development & Production
- + Multi-Channel, Integrated Campaigns including paid media, retail materials, corporate sponsorships, and social media strategy and content.

**Account Processes:**

- + Contract Structure: Agency of Record
- + Billing: Monthly
- + Communication Protocols: Weekly Status Calls, Monthly Commission Meeting, Daily Email/Phone

### **3.**

## **PAST PERFORMANCE EVIDENCE OF KNOWLEDGE AND EXPERTISE**

### **SITUATION**

When the Lottery hired Cactus, they were suffering from what we call “the icky factor”: the perception that lotteries are nothing more than a tax on the poor and middle class. This perception issue can be a barrier that keeps otherwise promising audiences from playing, and prevent those who do play from doing so openly. The Lottery’s advertising and marketing efforts needed to make its brand and products more relevant and appealing to more people. While the Lottery’s media budget is larger than Broward County’s, the integrated scope of services Cactus provides is similar.

### **CHALLENGE**

- + Encourage trial to drive sales of Lottery products including Scratch tickets, Powerball, Mega Millions, Lotto, Cash 5 and Lucky for Life.
- + Increase acquisition of new players and retention of existing players, while also generating increased frequency of play.
- + Increase proceeds from Lottery sales to benefit Colorado parks, recreation projects, public buildings, environmental programs, wildlife preservation and acquiring open space and land.

### **INSIGHT**

Research revealed that the most effective way to flip negative perceptions into positive ones would be to provide our audiences with emotional experiences that equated the Colorado Lottery with fun and entertainment. We also expanded the Lottery’s strategic approach to simultaneously market the brand’s entire family of games, unifying a diverse product mix, while also effectively advertising specific game messages with targeted campaigns and promotions. And as media consumption habits have evolved over the last decade, so too have our strategies and methods of delivery, ensuring that we’re reaching the right people, with the right messages, in the right ways, at the right times.

### **SOLUTION**

Throughout our 11-year partnership as agency of record for the Colorado Lottery, Cactus has revitalized the Lottery brand and brought it to life through comprehensive, integrated campaigns and experiences that capture the sense of fun, excitement and optimism that Lottery games uniquely provide. We’ve also increased awareness of the Lottery’s proceeds mission in funding parks and recreation, in order to boost the brand’s image and get consumers to understand the impact the Lottery has in sustaining the Colorado lifestyle, ultimately moving our audience toward brand engagement and product purchase.

Our audiences have included the Dreamers, who are typically younger, hard working, and more ethnically diverse. They spend considerably more on Lottery games and engage with the Lottery in many ways, dream about what winning a big prize would look like, and have big plans for all the things they could do with their winnings. And then we have the Realists, who have a difficult time imagining winning a large prize, are less likely to believe they will win, and as a result are decidedly more restrained in terms of their Lottery play and are not easily motivated to purchase more tickets.

### 3. PAST PERFORMANCE EVIDENCE OF KNOWLEDGE AND EXPERTISE

Scratch game players are based more heavily on behaviors: playership, ticket preference/game appeal, and play habits outside of Lottery games. These players range from those who are excited to play every new game that comes out, to those who play reluctantly but still fairly consistently, and those who dabble in games that are almost as much for entertainment as they are for a chance of winning. Across these audience segments, our work has strived to be culturally relevant among economically and ethnically diverse audiences, including producing broadcast creative for the majority of campaigns in both English and Spanish languages.

Throughout our history of working with the Lottery, Cactus has conducted annual awareness and consumer research, provided insights and strategic marketing planning, and successfully re-branded the Colorado Lottery twice to better align with ever-evolving audiences and an ever-changing consumer mindset. Across all Lottery games our work has also included planning, developing and producing advertising, collateral, web content, retail marketing efforts, email marketing, social media strategy and content, experiential events and sponsorships, apps, games and virtual reality. And every month we work directly with the sales and retail teams to manage and deliver a complex retail system of point-of-sale (POS), promotions and additional tactics to support the needs of more than 3,000 retail locations across Colorado.

## RESULTS

While Cactus has led the Colorado Lottery's integrated branding, advertising, web, event and retail marketing efforts, we've achieved truly phenomenal results:

### BRAND REPUTATION

- + Brand favorability has increased significantly, up from 63% in 2008 to 86% today.
- + Unaided recall of the designated uses of Lottery proceeds funds increased by nearly 5%.
- + The number of Coloradans who agreed that the Colorado Lottery does a good job of funding parks and recreation throughout the state increased by 6%.

### PRODUCTS & SALES

- + Annual sales have increased by 34% (from \$456 million in FY07 to \$612 million at the end of FY18).
- + Jackpot and Scratch product sales have grown each year since we've held the account.
- + Achieved record-setting sales year-over-year.

- + The Colorado Lottery returned more than \$140 million in proceeds to the state in FY18, and more than \$3.2 billion in total has now been given back to the state of Colorado since the Lottery's inception.

### OWNED CHANNELS

- + Coloradolottery.com yields more than 4 million visitors each month.
- + The brand's My Lottery insiders club has surpassed more than 450K members.
- + The Colorado Lottery's Facebook page has grown to more than 61k likes, a 1600% increase since its introduction in 2011.
- + Proceeds campaigns generated a 103% increase in visits to the "Giving Back" page on the Lottery website.

**Following are highlights of just some of the work we've produced for the Colorado Lottery.**



3.

PAST PERFORMANCE EVIDENCE  
OF KNOWLEDGE AND EXPERTISE

BRAND CREATIVE



Out-of-Home



Out-of-Home



Point-of-Sale



TV Spot [VIEW](#)



**3.**  
**PAST PERFORMANCE EVIDENCE**  
**OF KNOWLEDGE AND EXPERTISE**

PROCEEDS CREATIVE



Print Ads



Out-of-Home





**3.**  
**PAST PERFORMANCE EVIDENCE**  
**OF KNOWLEDGE AND EXPERTISE**

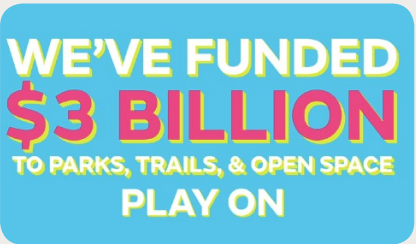
PROCEEDS CREATIVE (cont.)



Out-of-Home



Virtual Reality



Virtual Reality Video [VIEW](#)

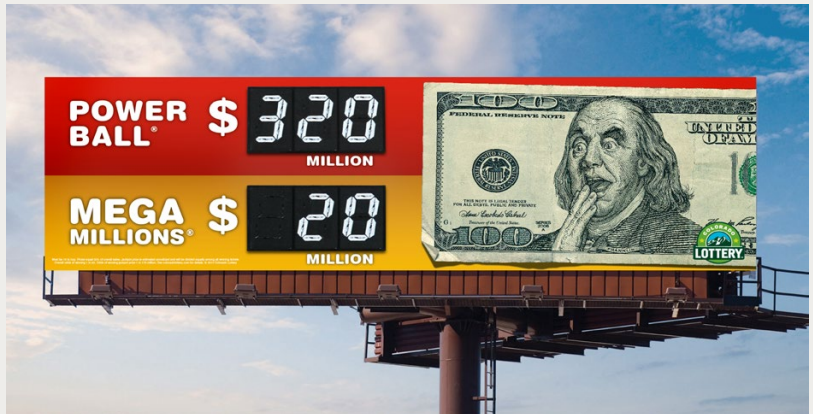


**3.**  
**PAST PERFORMANCE EVIDENCE**  
**OF KNOWLEDGE AND EXPERTISE**

**POWERBALL / MEGA MILLIONS CREATIVE**



Out-of-Home



TV Spot [VIEW](#)



TV Spot [VIEW](#)



TV Spot [VIEW](#)



**3.**  
**PAST PERFORMANCE EVIDENCE**  
**OF KNOWLEDGE AND EXPERTISE**

**SCRATCH CREATIVE**



Out-of-Home



Point-of-Sale



TV Spot [VIEW](#)



TV Spot [VIEW](#)



Website Content

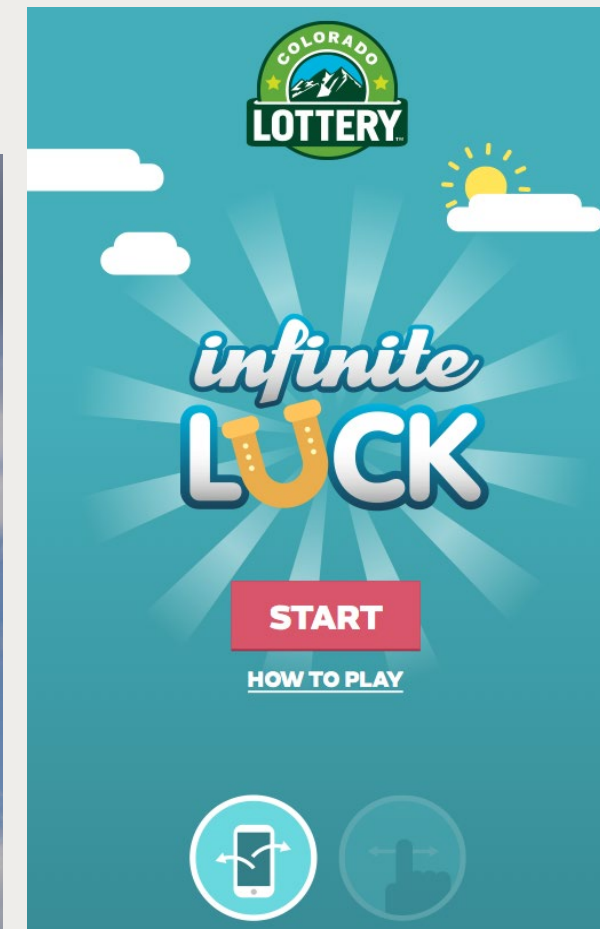


### 3. PAST PERFORMANCE EVIDENCE OF KNOWLEDGE AND EXPERTISE

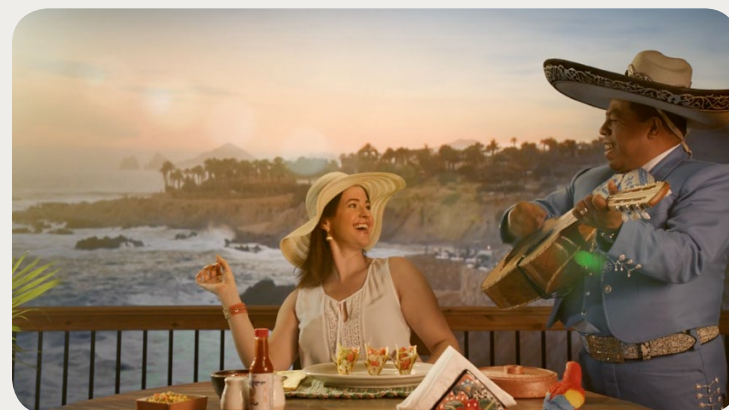
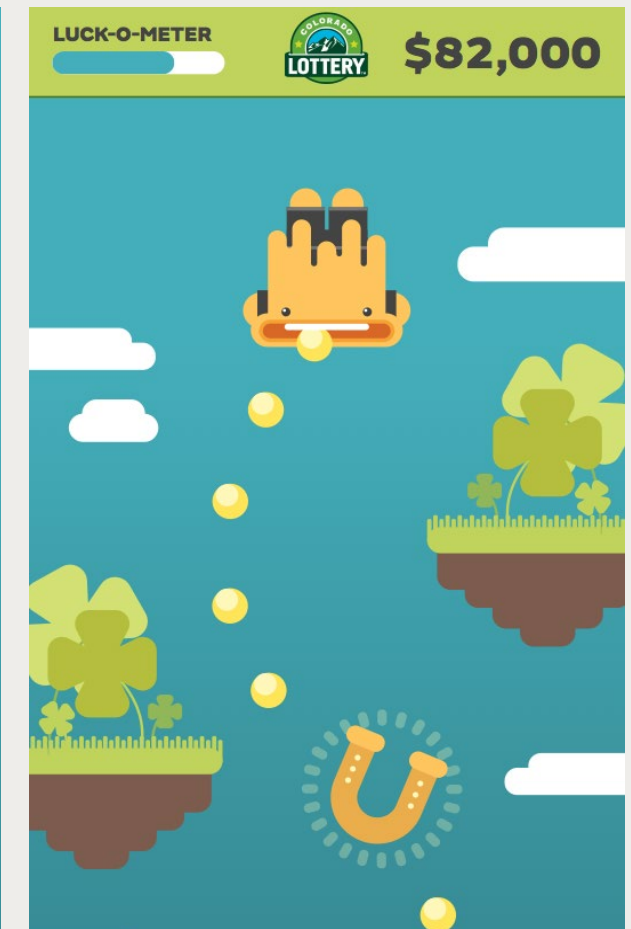
## LUCKY FOR LIFE CREATIVE



Out-of-Home



Lucky for Life Game [PLAY](#)



TV Spot [VIEW](#)



TV Spot [VIEW](#)



### 3. PAST PERFORMANCE EVIDENCE OF KNOWLEDGE AND EXPERTISE

## LOTTERY MASCOTS & SPONSORSHIPS

Cactus has handled a wide range of sponsorship responsibilities for the Lottery including strategic planning and concept development, contract negotiation, creative development and production, and management of in-venue and in-market activation. Our sponsorship campaigns work to increase brand awareness, brand recall, product trial and favorability by combining a strong visual presence with highly unique creative elements to keep the brand experience fresh, engaging and entertaining for consumers. We approach every opportunity seeking to maximize cost efficiency and relevancy, to ensure that every dollar spent reaches individuals in a meaningful and memorable way.

Cactus created a team of large, Lottery game ball costumes for use at a wide range of promotional and public relations events, as well as planned and executed unique, in-game/in-event promotional and experiential opportunities across various sports teams and venues, concerts, festivals, and the National Western Stock Show. Creative assets including LED in-venue signage, 3D projections, pre- and in-game/in-event features, promotional giveaways, contests, fan engagement programs, and an in-arena blimp that flies over crowds dropping free Colorado Lottery scratch tickets, have created engaging and memorable experiences for consumers.





### **3. PAST PERFORMANCE EVIDENCE OF KNOWLEDGE AND EXPERTISE**

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#### **ENSURING THE CAMPAIGN IS CULTURALLY RESPONSIVE**

While these particular case studies do not feature specific minority audiences, at Cactus we have extensive experience working with and developing campaigns that engage African American, LGBT+ and Latino markets.

Diversity comes in many forms – ethnicity, language, socioeconomic status, age, education, occupation, location and sexual identity. Our experience has taught us the importance of investing time and resources into conducting research and engaging individuals from various diverse communities in order to inform campaign messaging and implementation to achieve reach and resonance. Sometimes campaign messages and concepts need to speak to the common truths across all target audiences and be inclusive of everyone. Other times our campaigns need to leverage different tactics, messages and/or communications channels to reach a specific target audience. And in certain cases, we research, target and craft campaigns that are customized and tailored in every way to resonate with very specific audiences.

Throughout our history Cactus has conducted surveys, focus groups, ethnographic studies, online forums and both quantitative and qualitative research, to gain consumer insights and to help test and evaluate campaigns. We've crafted campaigns and messaging for individuals of varying age groups, ethnic backgrounds, languages, socioeconomic status, geographic locations, sexual orientation and gender identity.

# 4. AGENCY WORKLOAD

**4.**  
**AGENCY WORKLOAD**

4. For the prime Vendor only, list all completed and active projects that the Vendor has managed within the last five years. In addition, list all projected projects that Vendor will be working on in the near future. Identify any current or future clients with any potential conflicts of interest.

# PAST PROJECT WORKLOAD

*The Cactus team is flexible, talented and able to handle the workload outlined in this RFP. Within the last five years, Cactus has serviced the following clients and projects:*

**NUMBER OF CLIENTS:**



**NUMBER OF PROJECTS:**



**PROJECT TYPES:**

- + Qualitative & Quantitative Research
- + Brand Strategy / Architecture / Positioning
- + Media/Communications Planning & Buying
- + Creative Campaign Concept Development
- + TV, Radio, Print, OOH, Digital Advertising
- + Video Production
- + Brand Identity
- + Packaging Design
- + Point-of-Sale / Retail Display
- + Printed & Digital Collateral
- + Websites / Apps / Games
- + Email Marketing / eCRM
- + SEO / SEM
- + Social Media / Influencers
- + Public Relations, Community Relations
- + Events, Promotions & Sponsorships



## 4. AGENCY WORKLOAD

# PROJECTED PROJECT WORKLOAD

Currently, Cactus' projected workload for the upcoming year and the anticipated length of this contract is comparable to the previous years displayed in this proposal. If selected as Broward County's agency of record, Cactus will dedicate the necessary team members, services and hours outlined in our response, and does not foresee any issues with managing this workload going forward.

# CONFLICTS OF INTEREST

Cactus does not believe any current clients, or future clients under consideration for an award, pose a possible conflict of interest to the Broward County account.

# 5. LOCATION

## 5. LOCATION

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# CACTUS

is a full-service, integrated communications agency with its principal place of business in Denver, Colorado. Even though we do not meet the local business requirements as detailed in this RFP, we do believe Cactus is the right agency partner to lead Broward County and the GFLCVB into a prosperous future.

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# 6. PRICE

## 6. PRICE

*6. Provide proposed monthly fee for Flat Fee Services for the Initial Term (three years). Refer to ITEM RESPONSE FORM. Proposed monthly fee (Flat Fee Services) must include all creative development fees, project management, copy writing, digital media and content strategy, media buying, etc. Price must be submitted, in BidSync, by the time for the solicitation due date in order to be responsive to solicitation requirements.*

# PRICE

Cactus has provided a monthly fee for Flat Fee Agency Services for the Initial Term, years one through three, via the BidSync system. This monthly flat fee includes all agency services for the Scope of Services outlined in the RFP including brand strategy, account planning and research, creative development and production, account and project management, media planning and buying, reporting and evaluation.

While Cactus has provided an annual Flat Fee Services as requested, we welcome the opportunity to discuss and negotiate a compensation structure that is equitable for both parties, that works within the GFLCVB's overall marketing budget, and is based upon a scope of work and services that we define and agree upon together. We believe in building a true client/agency partnership, working each and every day to solve marketing problems, show value in everything we do, and produce meaningful work that makes a huge impact and yields powerful results.

# 7. PRICING SUPPORT



## 7. PRICING SUPPORT

7. Provide an average monthly projection of level of effort, including a breakdown of the hourly fees by job classification, for the proposed project team, totaling to the Flat Fee Services by month (proposed in item no. 6).

# PRICING SUPPORT

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*Following is an average monthly projection of level of effort and breakdown of hourly fees.*

7.

PRICING SUPPORT

MONTHLY RETAINER YEARS ONE - THREE

YEAR ONE: Average of 575 hours per month

	TOTAL HOURS	TOTAL FEES
Account Strategy & Leadership	575	\$106,875.00
Strategy / Account Planning	200	\$30,000.00
Account Management	1025	\$153,750.00
Project Management	555	\$69,375.00
Media Strategy, Planning, Buying	1050	\$167,500.00
Media Admin / Reporting	750	\$75,000.00
Creative Services	1155	\$185,625.00
Digital Services	351	\$61,425.00
Production Services & Management	637	\$86,450.00
Travel Time	600	\$24,000.00
TOTALS	6,898	\$960,000
Per Month	575	\$80,000

YEARS TWO & THREE: Average of 502 hours per month

	TOTAL HOURS	TOTAL FEES
Account Strategy & Leadership	406	\$75,550.00
Strategy / Account Planning	130	\$19,500.00
Account Management	895	\$134,250.00
Project Management	508	\$63,500.00
Media Strategy, Planning, Buying	965	\$153,250.00
Media Admin / Reporting	750	\$75,000.00
Creative Services	985	\$156,250.00
Digital Services	338	\$59,150.00
Production Services & Management	645	\$87,550.00
Travel Time	400	\$16,000.00
TOTALS	6,022	\$840,000
Per Month	502	\$70,000

**7.**  
**PRICING SUPPORT**

7. Provide salary rates for any positions not included in the Flat Fee Services that might be required in the provision of Optional Services, Adverse Impact Services, Initial Branding Services, Social Media Services, and Website Design Services.

**OPTIONAL  
SERVICES**

Following are the salary rates, by agency service, to be charged in the provision of Optional Services as outlined in the RFP’s Scope of Services.

**SERVICE**  
**HOURLY RATE**

Chief Strategy Officer / CEO:	\$300.00
Account Strategy / Leadership:	\$175.00
Account Management:	\$150.00
Account Planning / Research:	\$150.00
Project Management:	\$125.00
Media Communications Strategy / Planning:	\$175.00
Media Buying:	\$150.00
Public Relations / Community Relations:	\$150.00
Community Management / Social Execution:	\$100.00
Media Admin / Billing / Reporting:	\$100.00
Chief Creative Officer:	\$300.00
Creative Direction:	\$175.00
Art Direction / Design:	\$150.00
Copywriting:	\$150.00
Production Art / Design:	\$135.00
Retouching / Color Correction:	\$150.00
Video Editing:	\$140.00
Digital Programming / Development:	\$175.00
User Experience / UX:	\$175.00
Digital / Production Strategy:	\$175.00
Production Management:	\$150.00
Media Trafficking:	\$100.00
Spanish Translation:	\$100.00
Travel Time:	\$40.00
Administrative Support:	\$100.00



**MEANINGFUL  
WORK.  
HUGE IMPACT.**





## Supplier: **Cactus Marketing Communications**

### **Standard Instructions to Vendors Request for Proposals, Request for Qualifications, or Request for Letters of Interest**

Vendors are instructed to read and follow the instructions carefully, as any misinterpretation or failure to comply with instructions may lead to a Vendor's submittal being rejected.

**Vendor MUST submit its solicitation response electronically and MUST confirm its submittal in order for the County to receive a valid response through BidSync. Refer to the [Purchasing Division website](#) or contact BidSync for submittal instructions.**

#### **A. Responsiveness Criteria:**

In accordance with Broward County Procurement Code Section 21.8.b.65, a Responsive Bidder [Vendor] means a person who has submitted a proposal which conforms in all material respects to a solicitation. The solicitation submittal of a responsive Vendor must be submitted on the required forms, which contain all required information, signatures, notarizations, insurance, bonding, security, or other mandated requirements required by the solicitation documents to be submitted at the time of proposal opening.

Failure to provide the information required below at the time of submittal opening may result in a recommendation Vendor is non-responsive by the Director of Purchasing. The Selection or Evaluation Committee will determine whether the firm is responsive to the requirements specified herein. The County reserves the right to waive minor technicalities or irregularities as is in the best interest of the County in accordance with Section 21.30.f.1(c) of the Broward County Procurement Code.

Below are standard responsiveness criteria; refer to **Special Instructions to Vendors**, for Additional Responsiveness Criteria requirement(s).

#### **1. Lobbyist Registration Requirement Certification**

Refer to **Lobbyist Registration Requirement Certification**. The completed form should be submitted with the solicitation response but must be submitted within three business days of County's request. Vendor may be deemed non-responsive for failure to fully comply within stated timeframes.

#### **2. Addenda**

The County reserves the right to amend this solicitation prior to the due date. Any change(s) to this solicitation will be conveyed through the written addenda process. Only written addenda will be binding. If a "must" addendum is issued, Vendor must follow instructions and submit required information, forms, or acknowledge addendum, as instructed therein. It is the responsibility of all potential Vendors to monitor the solicitation for any changing information, prior to submitting their response.

#### **B. Responsibility Criteria:**

Definition of a Responsible Vendor: In accordance with Section 21.8.b.64 of the Broward County Procurement Code, a Responsible Vendor means a Vendor who has the capability in all respects to perform the contract requirements, and the integrity and reliability which will assure good faith performance.

The Selection or Evaluation Committee will recommend to the awarding authority a determination of



a Vendor's responsibility. At any time prior to award, the awarding authority may find that a Vendor is not responsible to receive a particular award.

Failure to provide any of this required information and in the manner required may result in a recommendation by the Director of Purchasing that the Vendor is non-responsive.

Below are standard responsibility criteria; refer to **Special Instructions to Vendors**, for Additional Responsibility Criteria requirement(s).

## 1. **Litigation History**

- a. All Vendors are required to disclose to the County all "material" cases filed, pending, or resolved during the last three (3) years prior to the solicitation response due date, whether such cases were brought by or against the Vendor, any parent or subsidiary of the Vendor, or any predecessor organization. Additionally, all Vendors are required to disclose to the County all "material" cases filed, pending, or resolved against any principal of Vendor, regardless of whether the principal was associated with Vendor at the time of the "material" cases against the principal, during the last three (3) years prior to the solicitation response. A case is considered to be "material" if it relates, in whole or in part, to any of the following:
  - i. A similar type of work that the vendor is seeking to perform for the County under the current solicitation;
  - ii. An allegation of fraud, negligence, error or omissions, or malpractice against the vendor or any of its principals or agents who would be performing work under the current solicitation;
  - iii. A vendor's default, termination, suspension, failure to perform, or improper performance in connection with any contract;
  - iv. The financial condition of the vendor, including any bankruptcy petition (voluntary and involuntary) or receivership; or
  - v. A criminal proceeding or hearing concerning business-related offenses in which the vendor or its principals (including officers) were/are defendants.
- b. For each material case, the Vendor is required to provide all information identified in the **Litigation History Form**. Additionally, the Vendor shall provide a copy of any judgment or settlement of any material case during the last three (3) years prior to the solicitation response. Redactions of any confidential portions of the settlement agreement are only permitted upon a certification by Vendor that all redactions are required under the express terms of a pre-existing confidentiality agreement or provision.
- c. The County will consider a Vendor's litigation history information in its review and determination of responsibility.
- d. If the Vendor is a joint venture, the information provided should encompass the joint venture and each of the entities forming the joint venture.
- e. A vendor is required to disclose to the County any and all cases(s) that exist between the County and any of the Vendor's subcontractors/subconsultants proposed to work on this project during the last five (5) years prior to the solicitation response.
- f. Failure to disclose any material case, including all requested information in connection with each such case, as well as failure to disclose the Vendor's subcontractors/subconsultants litigation history against the County, may result in the Vendor being deemed non-responsive.

## 2. **Financial Information**

- a. All Vendors are required to provide the Vendor's financial statements at the time of submittal

in order to demonstrate the Vendor's financial capabilities.

- b. Each Vendor shall submit its most recent two years of financial statements for review. The financial statements are not required to be audited financial statements. The annual financial statements will be in the form of:
  - i. Balance sheets, income statements and annual reports; or
  - ii. Tax returns; or
  - iii. SEC filings.

If tax returns are submitted, ensure it does not include any personal information (as defined under Florida Statutes Section 501.171, Florida Statutes), such as social security numbers, bank account or credit card numbers, or any personal pin numbers. If any personal information data is part of financial statements, redact information prior to submitting a response the County.

- c. If a Vendor has been in business for less than the number of years of required financial statements, then the Vendor must disclose all years that the Vendor has been in business, including any partial year-to-date financial statements.
- d. The County may consider the unavailability of the most recent year's financial statements and whether the Vendor acted in good faith in disclosing the financial documents in its evaluation.
- e. Any claim of confidentiality on financial statements should be asserted at the time of submittal. Refer to **Standard Instructions to Vendors**, Confidential Material/ Public Records and Exemptions for instructions on submitting confidential financial statements. The Vendor's failure to provide the information as instructed may lead to the information becoming public.
- f. Although the review of a Vendor's financial information is an issue of responsibility, the failure to either provide the financial documentation or correctly assert a confidentiality claim pursuant the Florida Public Records Law and the solicitation requirements (Confidential Material/ Public Records and Exemptions section) may result in a recommendation of non-responsiveness by the Director of Purchasing.

### 3. Authority to Conduct Business in Florida

- a. A Vendor must have the authority to transact business in the State of Florida and be in good standing with the Florida Secretary of State. For further information, contact the Florida Department of State, Division of Corporations.
- b. The County will review the Vendor's business status based on the information provided in response to this solicitation.
- c. It is the Vendor's responsibility to comply with all state and local business requirements.
- d. Vendor should list its active Florida Department of State Division of Corporations Document Number (or Registration No. for fictitious names) in the **Vendor Questionnaire**, Question No. 10.
- e. If a Vendor is an out-of-state or foreign corporation or partnership, the Vendor must obtain the authority to transact business in the State of Florida or show evidence of application for the authority to transact business in the State of Florida, upon request of the County.
- f. A Vendor that is not in good standing with the Florida Secretary of State at the time of a

submission to this solicitation may be deemed non-responsible.

- g. If successful in obtaining a contract award under this solicitation, the Vendor must remain in good standing throughout the contractual period of performance.

#### 4. Affiliated Entities of the Principal(s)

- a. All Vendors are required to disclose the names and addresses of “affiliated entities” of the Vendor’s principal(s) over the last five (5) years (from the solicitation opening deadline) that have acted as a prime Vendor with the County. The Vendor is required to provide all information required on the **Affiliated Entities of the Principal(s) Certification Form**.
- b. The County will review all affiliated entities of the Vendor’s principal(s) for contract performance evaluations and the compliance history with the County’s Small Business Program, including CBE, DBE and SBE goal attainment requirements. “Affiliated entities” of the principal(s) are those entities related to the Vendor by the sharing of stock or other means of control, including but not limited to a subsidiary, parent or sibling entity.
- c. The County will consider the contract performance evaluations and the compliance history of the affiliated entities of the Vendor’s principals in its review and determination of responsibility.

#### 5. Insurance Requirements

The **Insurance Requirement Form** reflects the insurance requirements deemed necessary for this project. It is not necessary to have this level of insurance in effect at the time of submittal, but it is necessary to submit certificates indicating that the Vendor currently carries the insurance or to submit a letter from the carrier indicating it can provide insurance coverages.

#### C. Additional Information and Certifications

The following forms and supporting information (if applicable) should be returned with Vendor’s submittal. If not provided with submittal, the Vendor must submit within three business days of County’s request. Failure to timely submit may affect Vendor’s evaluation.

##### 1. Vendor Questionnaire

Vendor is required to submit detailed information on their firm. Refer to the **Vendor Questionnaire** and submit as instructed.

##### 2. Standard Certifications

Vendor is required to certify to the below requirements. Refer to the **Standard Certifications** and submit as instructed.

- a. **Cone of Silence Requirement Certification**
- b. **Drug-Free Workplace Certification**
- c. **Non-Collusion Certification**
- d. **Public Entities Crimes Certification**
- e. **Scrutinized Companies List Certification**

##### 3. Subcontractors/Subconsultants/Suppliers Requirement

The Vendor shall submit a listing of all subcontractors, subconsultants, and major material suppliers, if any, and the portion of the contract they will perform. Vendors must follow the instructions included on the **Subcontractors/Subconsultants/Suppliers Information Form** and submit as instructed.



#### D. Standard Agreement Language Requirements

1. The acceptance of or any exceptions taken to the terms and conditions of the County's Agreement shall be considered a part of a Vendor's submittal and will be considered by the Selection or Evaluation Committee.
2. The applicable Agreement terms and conditions for this solicitation are indicated in the **Special Instructions to Vendors**.
3. Vendors are required to review the applicable terms and conditions and submit the **Agreement Exception Form**. If the **Agreement Exception Form** is not provided with the submittal, it shall be deemed an affirmation by the Vendor that it accepts the Agreement terms and conditions as disclosed in the solicitation.
4. If exceptions are taken, the Vendor must specifically identify each term and condition with which it is taking an exception. Any exception not specifically listed is deemed waived. Simply identifying a section or article number is not sufficient to state an exception. Provide either a redlined version of the specific change(s) or specific proposed alternative language. Additionally, a brief justification specifically addressing each provision to which an exception is taken should be provided.
5. Submission of any exceptions to the Agreement does not denote acceptance by the County. Furthermore, taking exceptions to the County's terms and conditions may be viewed unfavorably by the Selection or Evaluation Committee and ultimately may impact the overall evaluation of a Vendor's submittal.

#### E. Evaluation Criteria

1. The Selection or Evaluation Committee will evaluate Vendors as per the **Evaluation Criteria**. The County reserves the right to obtain additional information from a Vendor.
2. Vendor has a continuing obligation to inform the County in writing of any material changes to the information it has previously submitted. The County reserves the right to request additional information from Vendor at any time.
3. For Request for Proposals, the following shall apply:
  - a. The Director of Purchasing may recommend to the Evaluation Committee to short list the most qualified firms prior to the Final Evaluation.
  - b. The Evaluation Criteria identifies points available; a total of 100 points is available.
  - c. If the Evaluation Criteria includes a request for pricing, the total points awarded for price is determined by applying the following formula:
$$\frac{(\text{Lowest Proposed Price}/\text{Vendor's Price}) \times (\text{Maximum Number of Points for Price})}{= \text{Price Score}}$$
  - d. After completion of scoring, the County may negotiate pricing as in its best interest.
4. For Requests for Letters of Interest or Request for Qualifications, the following shall apply:
  - a. The Selection or Evaluation Committee will create a short list of the most qualified firms.
  - b. The Selection or Evaluation Committee will either:

- i. Rank shortlisted firms; or
- ii. If the solicitation is part of a two-step procurement, shortlisted firms will be requested to submit a response to the Step Two procurement.

## **F. Demonstrations**

If applicable, as indicated in Special Instructions to Vendors, Vendors will be required to demonstrate the nature of their offered solution. After receipt of submittals, all Vendors will receive a description of, and arrangements for, the desired demonstration. In accordance with Section 286.0113 of the Florida Statutes and pursuant to the direction of the Broward County Board of Commissioners, demonstrations are closed to only the vendor team and County staff.

## **G. Presentations**

Vendors that are found to be both responsive and responsible to the requirements of the solicitation and/or shortlisted (if applicable) will have an opportunity to make an oral presentation to the Selection or Evaluation Committee on the Vendor's approach to this project and the Vendor's ability to perform. The committee may provide a list of subject matter for the discussion. All Vendor's will have equal time to present but the question-and-answer time may vary. In accordance with Section 286.0113 of the Florida Statutes and the direction of the Broward County Board of Commissioners, presentations during Selection or Evaluation Committee Meetings are closed. Only the Selection or Evaluation Committee members, County staff and the vendor and their team scheduled for that presentation will be present in the Meeting Room during the presentation and subsequent question and answer period.

## **H. Public Art and Design Program**

If indicated in **Special Instructions to Vendors**, Public Art and Design Program, Section 1-88, Broward County Code of Ordinances, applies to this project. It is the intent of the County to functionally integrate art, when applicable, into capital projects and integrate artists' design concepts into this improvement project. The Vendor may be required to collaborate with the artist(s) on design development within the scope of this request. Artist(s) shall be selected by Broward County through an independent process. For additional information, contact the Broward County Cultural Division.

## **I. Committee Appointment**

The Cone of Silence shall be in effect for County staff at the time of the Selection or Evaluation Committee appointment and for County Commissioners and Commission staff at the time of the Shortlist Meeting of the Selection Committee or the Initial Evaluation Meeting of the Evaluation Committee. The committee members appointed for this solicitation are available on the Purchasing Division's website under [Committee Appointment](#).

## **J. Committee Questions, Request for Clarifications, Additional Information**

At any committee meeting, the Selection or Evaluation Committee members may ask questions, request clarification, or require additional information of any Vendor's submittal or proposal. It is highly recommended Vendors attend to answer any committee questions (if requested), including a Vendor representative that has the authority to bind.

Vendor's answers may impact evaluation (and scoring, if applicable). Upon written request to the Purchasing Agent prior to the meeting, a conference call number will be made available for Vendor participation via teleconference. Only Vendors that are found to be both responsive and responsible to the requirements of the solicitation and/or shortlisted (if applicable) are requested to participate in a final (or presentation) Selection or Evaluation committee meeting.

## **K. Vendor Questions**

The County provides a specified time for Vendors to ask questions and seek clarification regarding solicitation requirements. All questions or clarification inquiries must be submitted through BidSync by the date and time referenced in the solicitation document (including any addenda). The County will respond to questions via Bid Sync.

## **L. Confidential Material/ Public Records and Exemptions**

1. Broward County is a public agency subject to Chapter 119, Florida Statutes. Upon receipt, all submittals become "public records" and shall be subject to public disclosure consistent with Chapter 119, Florida Statutes. Submittals may be posted on the County's public website or included in a public records request response, unless there is a declaration of "confidentiality" pursuant to the public records law and in accordance with the procedures in this section.
2. Any confidential material(s) the Vendor asserts is exempt from public disclosure under Florida Statutes must be labeled as "Confidential", and marked with the specific statute and subsection asserting exemption from Public Records.
3. To submit confidential material, three hardcopies must be submitted in a sealed envelope, labeled with the solicitation number, title, date and the time of solicitation opening to:

Broward County Purchasing Division  
115 South Andrews Avenue, Room 212  
Fort Lauderdale, FL 33301

4. Material will not be treated as confidential if the Vendor does not cite the applicable Florida Statute (s) allowing the document to be treated as confidential.
5. Any materials that the Vendor claims to be confidential and exempt from public records must be marked and separated from the submittal. If the Vendor does not comply with these instructions, the Vendor's claim for confidentiality will be deemed as waived.
6. Submitting confidential material may impact full discussion of your submittal by the Selection or Evaluation Committee because the Committee will be unable to discuss the details contained in the documents cloaked as confidential at the publicly noticed Committee meeting.

## **M. Copyrighted Materials**

Copyrighted material is not exempt from the Public Records Law, Chapter 119, Florida Statutes. Submission of copyrighted material in response to any solicitation will constitute a license and permission for the County to make copies (including electronic copies) as reasonably necessary for the use by County staff and agents, as well as to make the materials available for inspection or production pursuant to Public Records Law, Chapter 119, Florida Statutes.

## **N. State and Local Preferences**

If the solicitation involves a federally funded project where the fund requirements prohibit the use of state and/or local preferences, such preferences contained in the Local Preference Ordinance and Broward County Procurement Code will not be applied in the procurement process.

## **O. Local Preference**

Except where otherwise prohibited by federal or state law or other funding source restrictions, a local Vendor whose submittal is within 5% of the highest total ranked Vendor outside of the preference area will become the Vendor with whom the County will proceed with negotiations for a



final contract. Refer to **Local Vendor Certification Form (Preference and Tiebreaker)** for further information.

## **P. Tiebreaker Criteria**

In accordance with Section 21.31.d of the Broward County Procurement Code, the tiebreaker criteria shall be applied based upon the information provided in the Vendor's response to the solicitation. In order to receive credit for any tiebreaker criterion, complete and accurate information must be contained in the Vendor's submittal.

1. **Local Vendor Certification Form (Preference and Tiebreaker);**
2. **Domestic Partnership Act Certification (Requirement and Tiebreaker);**
3. **Tiebreaker Criteria Form: Volume of Work Over Five Years**

## **Q. Posting of Solicitation Results and Recommendations**

The Broward County Purchasing Division's [website](#) is the location for the County's posting of all solicitations and contract award results. It is the obligation of each Vendor to monitor the website in order to obtain complete and timely information.

## **R. Review and Evaluation of Responses**

A Selection or Evaluation Committee is responsible for recommending the most qualified Vendor(s). The process for this procurement may proceed in the following manner:

1. The Purchasing Division delivers the solicitation submittals to agency staff for summarization for the committee members. Agency staff prepares a report, including a matrix of responses submitted by the Vendors. This may include a technical review, if applicable.
2. Staff identifies any incomplete responses. The Director of Purchasing reviews the information and makes a recommendation to the Selection or Evaluation Committee as to each Vendor's responsiveness to the requirements of the solicitation. The final determination of responsiveness rests solely on the decision of the committee.
3. At any time prior to award, the awarding authority may find that a Vendor is not responsible to receive a particular award. The awarding authority may consider the following factors, without limitation: debarment or removal from the authorized Vendors list or a final decree, declaration or order by a court or administrative hearing officer or tribunal of competent jurisdiction that the Vendor has breached or failed to perform a contract, claims history of the Vendor, performance history on a County contract(s), an unresolved concern, or any other cause under this code and Florida law for evaluating the responsibility of a Vendor.

## **S. Vendor Protest**

Sections 21.118 and 21.120 of the Broward County Procurement Code set forth procedural requirements that apply if a Vendor intends to protest a solicitation or proposed award of a contract and state in part the following:

1. Any protest concerning the solicitation or other solicitation specifications or requirements must be made and received by the County within seven business days from the posting of the solicitation or addendum on the Purchasing Division's website. Such protest must be made in writing to the Director of Purchasing. Failure to timely protest solicitation specifications or requirements is a waiver of the ability to protest the specifications or requirements.

2. Any protest concerning a solicitation or proposed award above the award authority of the Director of Purchasing, after the RLI or RFP opening, shall be submitted in writing and received by the Director of Purchasing within five business days from the posting of the recommendation of award for Invitation to Bids or the final recommendation of ranking for Request for Letters of Interest and Request for Proposals on the Purchasing Division's website.
3. Any actual or prospective Vendor who has a substantial interest in and is aggrieved in connection with the proposed award of a contract that does not exceed the amount of the award authority of the Director of Purchasing, may protest to the Director of Purchasing. The protest shall be submitted in writing and received within three (3) business days from the posting of the recommendation of award for Invitation to Bids or the final recommendation of ranking for Request for Letters of Interest and Request for Proposals on the Purchasing Division's website.
4. For purposes of this section, a business day is defined as Monday through Friday between 8:30 a.m. and 5:00 p.m. Failure to timely file a protest within the time prescribed for a proposed contract award shall be a waiver of the Vendor's right to protest.
5. As a condition of initiating any protest, the protestor shall present the Director of Purchasing a nonrefundable filing fee in accordance with the table below.

<u>Estimated Contract Amount</u>	<u>Filing Fee</u>
\$30,000 - \$250,000	\$ 500
\$250,001 - \$500,000	\$1,000
\$500,001 - \$5 million	\$3,000
Over \$5 million	5,000

If no contract proposal amount was submitted, the estimated contract amount shall be the County's estimated contract price for the project. The County may accept cash, money order, certified check, or cashier's check, payable to Broward County Board of Commissioners.

## **T. Right of Appeal**

Pursuant to Section 21.83.d of the Broward County Procurement Code, any Vendor that has a substantial interest in the matter and is dissatisfied or aggrieved in connection with the Selection or Evaluation Committee's determination of responsiveness may appeal the determination pursuant to Section 21.120 of the Broward County Procurement Code.

1. The appeal must be in writing and sent to the Director of Purchasing within ten (10) calendar days of the determination by the Selection or Evaluation Committee to be deemed timely.
2. As required by Section 21.120, the appeal must be accompanied by an appeal bond by a Vendor having standing to protest and must comply with all other requirements of this section.
3. The institution and filing of an appeal is an administrative remedy to be employed prior to the institution and filing of any civil action against the County concerning the subject matter of the appeal.

## **U. Rejection of Responses**

The Selection or Evaluation Committee may recommend rejecting all submittals as in the best interests of the County. The rejection shall be made by the Director of Purchasing, except when a solicitation was approved by the Board, in which case the rejection shall be made by the Board.

## V. Negotiations

The County intends to conduct the first negotiation meeting no later than two weeks after approval of the final ranking as recommended by the Selection or Evaluation Committee. At least one of the representatives for the Vendor participating in negotiations with the County must be authorized to bind the Vendor. In the event that the negotiations are not successful within a reasonable timeframe (notification will be provided to the Vendor) an impasse will be declared and negotiations with the first-ranked Vendor will cease. Negotiations will begin with the next ranked Vendor, etc. until such time that all requirements of Broward County Procurement Code have been met. In accordance with Section 286.0113 of the Florida Statutes and the direction of the Broward County Board of Commissioners, negotiations resulting from Selection or Evaluation Committee Meetings are closed. Only County staff and the selected vendor and their team will be present during negotiations.

## W. Submittal Instructions:

1. Broward County does not require any personal information (as defined under Section 501.171, Florida Statutes), such as social security numbers, driver license numbers, passport, military ID, bank account or credit card numbers, or any personal pin numbers, in order to submit a response for ANY Broward County solicitation. DO NOT INCLUDE any personal information data in any document submitted to the County. If any personal information data is part of a submittal, this information must be redacted prior to submitting a response to the County.
2. **Vendor MUST submit its solicitation response electronically and MUST confirm its submittal in order for the County to receive a valid response through BidSync.** It is the Vendor's sole responsibility to assure its response is submitted and received through BidSync by the date and time specified in the solicitation.
3. The County will not consider solicitation responses received by other means. Vendors are encouraged to submit their responses in advance of the due date and time specified in the solicitation document. In the event that the Vendor is having difficulty submitting the solicitation document through Bid Sync, immediately notify the Purchasing Agent and then contact BidSync for technical assistance.
4. Vendor must view, submit, and/or accept each of the documents in BidSync. Web-fillable forms can be filled out and submitted through BidSync.
5. After all documents are viewed, submitted, and/or accepted in BidSync, the Vendor must upload additional information requested by the solicitation (i.e. Evaluation Criteria and Financials Statements) in the Item Response Form in BidSync, under line one (regardless if pricing requested).
6. Vendor should upload responses to Evaluation Criteria in Microsoft Word or Excel format.
7. If the Vendor is declaring any material confidential and exempt from Public Records, refer to Confidential Material/ Public Records and Exemptions for instructions on submitting confidential material.
8. After all files are uploaded, Vendor must submit and **CONFIRM** its offer (by entering password) for offer to be received through BidSync.

9. If a solicitation requires an original Proposal Bond (per Special Instructions to Vendors), Vendor must submit in a sealed envelope, labeled with the solicitation number, title, date and the time of solicitation opening to:

Broward County Purchasing Division  
115 South Andrews Avenue, Room 212  
Fort Lauderdale, FL 33301

A copy of the Proposal Bond should also be uploaded into Bid Sync; this does not replace the requirement to have an original proposal bond. Vendors must submit the original Proposal Bond, by the solicitation due date and time.



**Supplier: Cactus Marketing Communications**

**VENDOR QUESTIONNAIRE AND STANDARD CERTIFICATIONS**  
**Request for Proposals, Request for Qualifications, or Request for Letters of Interest**

Vendor should complete questionnaire and complete and acknowledge the standard certifications and submit with the solicitation response. If not submitted with solicitation response, it must be submitted within three business days of County's request. Failure to timely submit may affect Vendor's evaluation.

**If a response requires additional information, the Vendor should upload a written detailed response with submittal; each response should be numbered to match the question number.** The completed questionnaire and attached responses will become part of the procurement record. It is imperative that the person completing the Vendor Questionnaire be knowledgeable about the proposing Vendor's business and operations.

1. Legal business name: **Cactus Communications, Inc.**
2. Doing Business As/ Fictitious Name (if applicable): **Cactus Marketing Communications, Inc.**
3. Federal Employer I.D. no. (FEIN): **841183960**
4. Dun and Bradstreet No.:
5. Website address (if applicable): **cactusinc.com**
6. Principal place of business address: **2128 15th Street**
7. Office location responsible for this project: **2128 15th Street**
8. Telephone no.: **3034557545** Fax no.: **3034550408**
9. Type of business (check appropriate box):
  - ☒ Corporation (specify the state of incorporation): **Colorado**
  - ☐ Sole Proprietor
  - ☐ Limited Liability Company (LLC)
  - ☐ Limited Partnership
  - ☐ General Partnership (State and County Filed In)
  - ☐ Other - Specify
10. List Florida Department of State, Division of Corporations document number (or registration number if fictitious name):
11. List name and title of each principal, owner, officer, and major shareholder:
  - a) **Joe Conrad, Founder & Chief Executive Officer**
  - b) **Norm Shearer, Partner & Chief Creative Officer**
  - c)
  - d)
12. AUTHORIZED CONTACT(S) FOR YOUR FIRM:  
  
Name: **Kristen Taylor Smith**

Title: **Strategy & Marketing Project Manager**

E-mail: **kristen@cactusinc.com**

Telephone No.: **3034557545**

Name:

Title:

E-mail:

Telephone No.:

13. Has your firm, its principals, officers or predecessor organization(s) been debarred or suspended by any government entity within the last three years? If yes, specify details in an attached written response. ☐ Yes ☒ No
14. Has your firm, its principals, officers or predecessor organization(s) ever been debarred or suspended by any government entity? If yes, specify details in an attached written response, including the reinstatement date, if granted. ☐ Yes ☒ No
15. Has your firm ever failed to complete any services and/or delivery of products during the last three (3) years? If yes, specify details in an attached written response. ☐ Yes ☒ No
16. Is your firm or any of its principals or officers currently principals or officers of another organization? If yes, specify details in an attached written response. ☐ Yes ☒ No
17. Have any voluntary or involuntary bankruptcy petitions been filed by or against your firm, its parent or subsidiaries or predecessor organizations during the last three years? If yes, specify details in an attached written response. ☐ Yes ☒ No
18. Has your firm's surety ever intervened to assist in the completion of a contract or have Performance and/or Payment Bond claims been made to your firm or its predecessor's sureties during the last three years? If yes, specify details in an attached written response, including contact information for owner and surety. ☐ Yes ☒ No
19. Has your firm ever failed to complete any work awarded to you, services and/or delivery of products during the last three (3) years? If yes, specify details in an attached written response. ☐ Yes ☒ No
20. Has your firm ever been terminated from a contract within the last three years? If yes, specify details in an attached written response. ☐ Yes ☒ No
21. Living Wage solicitations only: In determining what, if any, fiscal impacts(s) are a result of the Ordinance for this solicitation, provide the following for informational purposes only. Response is not considered in determining the award of this contract.
- Living Wage had an effect on the pricing. ☐ Yes ☒ No  
☒ N/A
- If yes, Living Wage increased the pricing by% or decreased the pricing by%.

**Cone of Silence Requirement Certification:**

The Cone of Silence Ordinance, Section 1-266, Broward County Code of Ordinances prohibits certain communications among Vendors, Commissioners, County staff, and Selection or Evaluation Committee members. Identify on a separate sheet any violations of this Ordinance by any members of the responding firm or its joint ventures. After the application of the Cone of Silence, inquiries regarding this solicitation should be directed to the Director of Purchasing or designee. The Cone of Silence terminates when the County Commission or other awarding authority takes action which ends the solicitation.

The Vendor hereby certifies that: (check each box)

- ☒ The Vendor has read Cone of Silence Ordinance, Section 1-266, Broward County Code of Ordinances; and
- ☒ The Vendor understands that the Cone of Silence for this competitive solicitation shall be in effect beginning upon the appointment of the Selection or Evaluation Committee, for communication regarding this

solicitation with the County Administrator, Deputy County Administrator, Assistant County Administrators, and Assistants to the County Administrator and their respective support staff or any person, including Evaluation or Selection Committee members, appointed to evaluate or recommend selection in this RFP/RLI process. For Communication with County Commissioners and Commission staff, the Cone of Silence allows communication until the initial Evaluation or Selection Committee Meeting.

- ☒ The Vendor agrees to comply with the requirements of the Cone of Silence Ordinance.

**Drug-Free Workplace Requirements Certification:**

Section 21.31.a. of the Broward County Procurement Code requires awards of all competitive solicitations requiring Board award be made only to firms certifying the establishment of a drug free workplace program. The program must consist of:

1. Publishing a statement notifying its employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the offeror's workplace, and specifying the actions that will be taken against employees for violations of such prohibition;
2. Establishing a continuing drug-free awareness program to inform its employees about:
  - a. The dangers of drug abuse in the workplace;
  - b. The offeror's policy of maintaining a drug-free workplace;
  - c. Any available drug counseling, rehabilitation, and employee assistance programs; and
  - d. The penalties that may be imposed upon employees for drug abuse violations occurring in the workplace;
3. Giving all employees engaged in performance of the contract a copy of the statement required by subparagraph 1;
4. Notifying all employees, in writing, of the statement required by subparagraph 1, that as a condition of employment on a covered contract, the employee shall:
  - a. Abide by the terms of the statement; and
  - b. Notify the employer in writing of the employee's 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 of any state, for a violation occurring in the workplace NO later than five days after such conviction.
5. Notifying Broward County government in writing within 10 calendar days after receiving notice under subdivision 4.b above, from an employee or otherwise receiving actual notice of such conviction. The notice shall include the position title of the employee;
6. Within 30 calendar days after receiving notice under subparagraph 4 of a conviction, taking one of the following actions with respect to an employee who is convicted of a drug abuse violation occurring in the workplace:
  - a. Taking appropriate personnel action against such employee, up to and including termination; or
  - b. Requiring such employee to participate satisfactorily in a drug abuse assistance or rehabilitation program approved for such purposes by a federal, state, or local health, law enforcement, or other appropriate agency; and
7. Making a good faith effort to maintain a drug-free workplace program through implementation of subparagraphs 1 through 6.

The Vendor hereby certifies that: (check box)

- ☒ The Vendor certifies that it has established a drug free workplace program in accordance with the above requirements.

**Non-Collusion Certification:**

Vendor shall disclose, to their best knowledge, any Broward County officer or employee, or any relative of any such officer or employee as defined in Section 112.3135 (1) (c), Florida Statutes, who is an officer or director of, or has a material interest in, the Vendor's business, who is in a position to influence this procurement. Any Broward County officer or employee who has any input into the writing of specifications or requirements, solicitation of

offers, decision to award, evaluation of offers, or any other activity pertinent to this procurement is presumed, for purposes hereof, to be in a position to influence this procurement. Failure of a Vendor to disclose any relationship described herein shall be reason for debarment in accordance with the provisions of the Broward County Procurement Code.

The Vendor hereby certifies that: (select one)

- ☒ The Vendor certifies that this offer is made independently and free from collusion; or
- ☐ The Vendor is disclosing names of officers or employees who have a material interest in this procurement and is in a position to influence this procurement. Vendor must include a list of name(s), and relationship(s) with its submittal.

**Public Entities Crimes Certification:**

In accordance with Public Entity Crimes, Section 287.133, Florida Statutes, a person or affiliate placed on the convicted vendor list following a conviction for a public entity crime may not submit on a contract: to provide any goods or services; for construction or repair of a public building or public work; for leases of real property to a public entity; and may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity; and may not transact business with any public entity in excess of the threshold amount provided in s. 287.017 for Category Two for a period of 36 months following the date of being placed on the convicted vendor list.

The Vendor hereby certifies that: (check box)

- ☒ The Vendor certifies that no person or affiliates of the Vendor are currently on the convicted vendor list and/or has not been found to commit a public entity crime, as described in the statutes.

**Scrutinized Companies List Certification:**

Any company, principals, or owners on the Scrutinized Companies with Activities in Sudan List, the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, or the Scrutinized Companies that Boycott Israel List is prohibited from submitting a response to a solicitation for goods or services in an amount equal to or greater than \$1 million.

The Vendor hereby certifies that: (check each box)

- ☒ The Vendor, owners, or principals are aware of the requirements of Sections 287.135, 215.473, and 215.4275, Florida Statutes, regarding Companies on the Scrutinized Companies with Activities in Sudan List the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, or the Scrutinized Companies that Boycott Israel List; and
- ☒ The Vendor, owners, or principals, are eligible to participate in this solicitation and are not listed on either the Scrutinized Companies with Activities in Sudan List, the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, or the Scrutinized Companies that Boycott Israel List; and
- ☒ If awarded the Contract, the Vendor, owners, or principals will immediately notify the County in writing if any of its principals are placed on the Scrutinized Companies with Activities in Sudan List, the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, or the Scrutinized Companies that Boycott Israel List.



I hereby certify the information provided in the Vendor Questionnaire and Standard Certifications:

<b>Kristen Taylor Smith</b>	<b>Strategy and Marketing Project Manager</b>	<b>3-19-19</b>
*AUTHORIZED SIGNATURE/NAME	TITLE	DATE

Vendor Name: **Cactus Marketing Communications**

\* I certify that I am authorized to sign this solicitation response on behalf of the Vendor as indicated in Certificate as to Corporate Principal, designation letter by Director/Corporate Officer, or other business authorization to bind on behalf of the Vendor. As the Vendor's authorized representative, I attest that any and all statements, oral, written or otherwise, made in support of the Vendor's response, are accurate, true and correct. I also acknowledge that inaccurate, untruthful, or incorrect statements made in support of the Vendor's response may be used by the County as a basis for rejection, rescission of the award, or termination of the contract and may also serve as the basis for debarment of Vendor pursuant to Section 21.119 of the Broward County Procurement Code. I certify that the Vendor's response is made without prior understanding, agreement, or connection with any corporation, firm or person submitting a response for the same items/services, and is in all respects fair and without collusion or fraud. I also certify that the Vendor agrees to abide by all terms and conditions of this solicitation, acknowledge and accept all of the solicitation pages as well as any special instructions sheet(s).

**Supplier: Cactus Marketing Communications**

**LOBBYIST REGISTRATION REQUIREMENT CERTIFICATION FORM**

The completed form should be submitted with the solicitation response but must be submitted within three business days of County's request. Vendor may be deemed non-responsive for failure to fully comply within stated timeframes.

The Vendor certifies that it understands if it has retained a lobbyist(s) to lobby in connection with a competitive solicitation, it shall be deemed non-responsive unless the firm, in responding to the competitive solicitation, certifies that each lobbyist retained has timely filed the registration or amended registration required under Broward County Lobbyist Registration Act, Section 1-262, Broward County Code of Ordinances; and it understands that if, after awarding a contract in connection with the solicitation, the County learns that the certification was erroneous, and upon investigation determines that the error was willful or intentional on the part of the Vendor, the County may, on that basis, exercise any contractual right to terminate the contract for convenience.

The Vendor hereby certifies that: (select one)

- ☒ It has not retained a lobbyist(s) to lobby in connection with this competitive solicitation; however, if retained after the solicitation, the County will be notified.
- ☐ It has retained a lobbyist(s) to lobby in connection with this competitive solicitation and certified that each lobbyist retained has timely filed the registration or amended registration required under Broward County Lobbyist Registration Act, Section 1-262, Broward County Code of Ordinances.

It is a requirement of this solicitation that the names of any and all lobbyists retained to lobby in connection with this solicitation be listed below:

Name of Lobbyist:

Lobbyist's Firm:

Phone:

E-mail: **kristen@cactusinc.com**

Name of Lobbyist:

Lobbyist's Firm:

Phone:

E-mail:

**Authorized Signature/Name: Kristen Taylor Smith Date: 2-19-19**

**Title: Strategy & Marketing Project Manager**

**Vendor Name: Cactus Marketing Communications**

**Supplier: Cactus Marketing Communications****DOMESTIC PARTNERSHIP ACT CERTIFICATION FORM (REQUIREMENT AND  
TIEBREAKER)**

Refer to Special Instructions to identify if Domestic Partnership Act is a requirement of the solicitation or acts only as a tiebreaker. If Domestic Partnership is a requirement of the solicitation, the completed and signed form should be returned with the Vendor's submittal. If the form is not provided with submittal, the Vendor must submit within three business days of County's request. Vendor may be deemed non-responsive for failure to fully comply within stated timeframes. To qualify for the Domestic Partnership tiebreaker criterion, the Vendor must currently offer the Domestic Partnership benefit and the completed and signed form must be returned at time of solicitation submittal.

The Domestic Partnership Act, Section 16 ½ -157, Broward County Code of Ordinances, requires all Vendors contracting with the County, in an amount over \$100,000 provide benefits to Domestic Partners of its employees, on the same basis as it provides benefits to employees' spouses, with certain exceptions as provided by the Ordinance.

For all submittals over \$100,000.00, the Vendor, by virtue of the signature below, certifies that it is aware of the requirements of Broward County's Domestic Partnership Act, Section 16-½ -157, Broward County Code of Ordinances; and certifies the following: (check only one below).

- ☐ 1. The Vendor currently complies with the requirements of the County's Domestic Partnership Act and provides benefits to Domestic Partners of its employees on the same basis as it provides benefits to employees' spouses
- ☐ 2. The Vendor will comply with the requirements of the County's Domestic Partnership Act at time of contract award and provide benefits to Domestic Partners of its employees on the same basis as it provides benefits to employees' spouses.
- ☐ 3. The Vendor will not comply with the requirements of the County's Domestic Partnership Act at time of award.
- ☐ 4. The Vendor does not need to comply with the requirements of the County's Domestic Partnership Act at time of award because the following exception(s) applies: **(check only one below)**.
  - ☐ The Vendor is a governmental entity, not-for-profit corporation, or charitable organization.
  - ☐ The Vendor is a religious organization, association, society, or non-profit charitable or educational institution.
  - ☐ The Vendor provides an employee the cash equivalent of benefits. (Attach an affidavit in compliance with the Act stating the efforts taken to provide such benefits and the amount of the cash equivalent).
  - ☐ The Vendor cannot comply with the provisions of the Domestic Partnership Act because it would violate the laws, rules or regulations of federal or state law or would violate or be inconsistent with the terms or conditions of a grant or contract with the United States or State of Florida. Indicate the law, statute or regulation (State the law, statute or regulation and attach explanation of its applicability).

Kristen Taylor Smith

Strategy &  
Marketing Project  
Manager  
TitleCactus Marketing  
Communications

2-19-19

Authorized Signature/Name

Vendor Name

Date





## Supplier: **Cactus Marketing Communications**

### Office of Economic and Small Business Requirements: CBE Goal Participation

- A. In accordance with the Broward County Business Opportunity Act of 2012, Section 1-81, Code of Ordinances, as amended (the "Business Opportunity Act"), the County Business Enterprise (CBE) Program is applicable to this contract. All Vendors responding to this solicitation are required to utilize CBE firms to perform the assigned participation goal for this contract.
- B. The CBE participation goal will be established based on the expected expenditure amount for the proposed scope of services for the project. The Office of Economic and Small Business Development (OESBD) will not include alternate items, optional services or allowances when establishing the CBE participation goal. If the County subsequently chooses to award any alternate items, optional services or allowances as determined by OESBD and the Contract Administrator to be related to the scope of services, OESBD may apply the established CBE participation goal. In such an instance, the County will issue a written notice to the successful Vendor that the CBE participation goal will also apply to the alternate items, optional services or allowances. Vendor shall submit all required forms pertaining to its compliance with the CBE participation goal, as applicable. Failure by Vendor to submit the required forms may result in the rejection of Vendor's solicitation submittal prior to the award or failure to comply with the contract requirements may have an impact on the vendor performance evaluation post award, as applicable.
- C. CBE Program Requirements: Compliance with CBE participation goal requirements is a matter of responsibility; Vendor should submit all required forms and information with its solicitation submittal. If the required forms and information are not provided with the Vendor's solicitation submittal, then Vendor must supply the required forms and information no later than three (3) business days after request by OESBD. Vendor may be deemed non-responsible for failure to fully comply with CBE Program Requirements within these stated timeframes.
1. Vendor should include in its solicitation submittal a **Letter Of Intent Between Bidder/Offeror and County Business Enterprise (CBE) Subcontractor/Supplier** for each CBE firm the Vendor intends to use to achieve the assigned CBE participation goal. The form is available at the following link:  
<http://www.broward.org/EconDev/Documents/CBELetterOfIntent.pdf>
  2. If Vendor is unable to attain the CBE participation goal, Vendor should include in its solicitation submittal an **Application for Evaluation of Good Faith Efforts** and all of the required supporting information. The form is available at the following link:  
<http://www.broward.org/EconDev/WhatWeDo/Documents/GoodFaithEffortEval.pdf>
- D. OESBD maintains an online directory of CBE firms. The online directory is available for use by Vendors at <https://webapps4.broward.org/smallbusiness/sbdirectory.aspx>.
- E. For detailed information regarding the CBE Program contact the OESBD at (954) 357-6400 or visit the website at: <http://www.broward.org/EconDev/SmallBusiness/>
- F. If awarded the contract, Vendor agrees to and shall comply with all applicable requirements of the Business Opportunity Act and the CBE Program in the award and administration of the contract.
1. No party to this contract may discriminate on the basis of race, color, sex, religion,

national origin, disability, age, marital status, political affiliation, sexual orientation, pregnancy, or gender identity and expression in the performance of this contract.

2. All entities that seek to conduct business with the County, including Vendor or any Prime Contractors, Subcontractors, and Bidders, shall conduct such business activities in a fair and reasonable manner, free from fraud, coercion, collusion, intimidation, or bad faith. Failure to do so may result in the cancellation of this solicitation, cessation of contract negotiations, revocation of CBE certification, and suspension or debarment from future contracts.
3. If Vendor fails to meet or make Good Faith Efforts (as defined in the Business Opportunity Act) to meet the CBE participation commitment (the "Commitment"), then Vendor shall pay the County liquidated damages in an amount equal to fifty percent (50%) of the actual dollar amount by which Vendor failed to achieve the Commitment, up to a maximum amount of ten percent (10%) of the total contract amount, excluding costs and reimbursable expenses. An example of this calculation is stated in Section 1-81.7, Broward County Code of Ordinances.
4. Vendor shall comply with all applicable requirements of the Business Opportunity Act in the award of this contract. Failure by Vendor to carry out any of these requirements shall constitute a material breach of the contract, which shall permit the County to terminate this contract or to exercise any other remedy provided under this contract, the Broward County Code of Ordinances, the Broward County Administrative Code, or other applicable laws, with all such remedies being cumulative.
5. Vendor shall pay its CBE subcontractors and suppliers, within fifteen (15) days following receipt of payment from the County, for all completed subcontracted work and supplies. If Vendor withholds an amount from CBE subcontractors or suppliers as retainage, such retainage shall be released and paid within fifteen (15) days following receipt of payment of retained amounts from the County.
6. Vendor understands that the County will monitor Vendor's compliance with the CBE Program requirements. Vendor must provide OESBD with a Monthly Utilization Report (MUR) to confirm its compliance with the Commitment agreed to in the contract; timely submission of the MUR every month throughout the term of the contract, including amendment and extension terms, is a condition precedent to the County's payment of Vendor under the contract.

**Supplier: Cactus Marketing Communications****LITIGATION HISTORY FORM**

The completed form(s) should be returned with the Vendor's submittal. If not provided with submittal, the Vendor must submit within three business days of County's request. Vendor may be deemed non-responsive for failure to fully comply within stated timeframes.

- ☒ There are no material cases for this Vendor; or  
☐ Material Case(s) are disclosed below:

Is this for a: (check type) <input type="checkbox"/> Parent, <input type="checkbox"/> Subsidiary, or <input type="checkbox"/> Predecessor Firm?	If Yes, name of Parent/Subsidiary/Predecessor:  Or No <input type="checkbox"/>
Party	
Case Number, Name, and Date Filed	
Name of Court or other tribunal	
Type of Case	Bankruptcy <input type="checkbox"/> Civil <input type="checkbox"/> Criminal <input type="checkbox"/> Administrative/Regulatory <input type="checkbox"/>
Claim or Cause of Action and Brief description of each Count	
Brief description of the Subject Matter and Project Involved	
Disposition of Case  (Attach copy of any applicable Judgment, Settlement Agreement and Satisfaction of Judgment.)	Pending <input type="checkbox"/> Settled <input type="checkbox"/> Dismissed <input type="checkbox"/>  Judgment Vendor's Favor <input type="checkbox"/> Judgment Against Vendor <input type="checkbox"/>  If Judgment Against, is Judgment Satisfied? <input type="checkbox"/> Yes <input type="checkbox"/> No
Opposing Counsel	Name: Email: Telephone Number:

**Vendor Name: Cactus Communications, Inc.**

Supplier: **Cactus Marketing Communications**

**AFFILIATED ENTITIES OF THE PRINCIPAL(S) CERTIFICATION FORM**

The completed form should be submitted with the solicitation response but must be submitted within three business days of County's request. Vendor may be deemed non-responsive for failure to fully comply within stated timeframes.

- a. All Vendors are required to disclose the names and addresses of "affiliated entities" of the Vendor's principal(s) over the last five (5) years (from the solicitation opening deadline) that have acted as a prime Vendor with the County.
- b. The County will review all affiliated entities of the Vendor's principal(s) for contract performance evaluations and the compliance history with the County's Small Business Program, including CBE, DBE and SBE goal attainment requirements. "Affiliated entities" of the principal(s) are those entities related to the Vendor by the sharing of stock or other means of control, including but not limited to a subsidiary, parent or sibling entity.
- c. The County will consider the contract performance evaluations and the compliance history of the affiliated entities of the Vendor's principals in its review and determination of responsibility.

The Vendor hereby certifies that: (select one)

- ☒ No principal of the proposing Vendor has prior affiliations that meet the criteria defined as "Affiliated entities"
- ☐ Principal(s) listed below have prior affiliations that meet the criteria defined as "Affiliated entities"

Principal's Name:

Names of Affiliated Entities:

Principal's Name:

Names of Affiliated Entities:

Principal's Name:

Names of Affiliated Entities:

Authorized Signature Name: **Kristina Byers**

Title: **VP, Business Operations**

Vendor Name: **Cactus Communications, Inc.**

Date: **3/7/19**



Supplier: **Cactus Marketing Communications**

### AGREEMENT EXCEPTION FORM

The completed form(s) should be returned with the Vendor's submittal. If not provided with submittal, it shall be deemed an affirmation by the Vendor that it accepts the terms and conditions of the County's Agreement as disclosed in the solicitation.

The Vendor must either provide specific proposed alternative language on the form below. Additionally, a brief justification specifically addressing each provision to which an exception is taken should be provided.

- ☒ There are no exceptions to the terms and conditions of the County Agreement as referenced in the solicitation; or
- ☐ The following exceptions are disclosed below: (use additional forms as needed; separate each Article/ Section number)

Term or Condition Article / Section	Insert version of exception or specific proposed alternative language	Provide brief justification for change

Vendor Name: kristen@cactusinc.com

**Supplier: Cactus Marketing Communications**

**RFP-RLI-RFQ LOCAL PREFERENCE AND TIE BREAKER CERTIFICATION FORM**

The completed and signed form should be returned with the Vendor's submittal to determine Local Preference eligibility, however it must be returned at time of solicitation submittal to qualify for the Tie Break criteria. If not provided with submittal, the Vendor must submit within three business days of County's request for evaluation of Local Preference. Proof of a local business tax should be submitted with this form. Failure to timely submit this form or local business tax receipt may render the business ineligible for application of the Local Preference or Tie Break Criteria.

In accordance with Section 21.31.d. of the Broward County Procurement Code, to qualify for the Tie Break Criteria, the undersigned Vendor hereby certifies that (check box if applicable):

- ☐ The Vendor is a local Vendor in Broward County and:
- a. has a valid Broward County local business tax receipt;
  - b. has been in existence for at least six-months prior to the solicitation opening;
  - c. at a business address physically located within Broward County;
  - d. in an area zoned for such business;
  - e. provides services from this location on a day-to-day basis, and
  - f. services provided from this location are a substantial component of the services offered in the Vendor's proposal.

In accordance with Local Preference, Section 1-74, et. seq., Broward County Code of Ordinances, a local business meeting the below requirements is eligible for Local Preference. To qualify for the Local Preference, the undersigned Vendor hereby certifies that (check box if applicable):

- ☐ The Vendor is a local Vendor in Broward and:
- a. has a valid Broward County local business tax receipt issued at least one year prior to solicitation opening;
  - b. has been in existence for at least one-year prior to the solicitation opening;
  - c. provides services on a day-to-day basis, at a business address physically located within the Broward County limits in an area zoned for such business; and
  - d. the services provided from this location are a substantial component of the services offered in the Vendor's proposal.

Local Business Address:

Vendor does not qualify for Tie Break Criteria or Local Preference, in accordance with the above requirements. The undersigned Vendor hereby certifies that (check box if applicable): The Vendor is not a local Vendor in Broward County.

**Kristen Taylor Smith**

**Strategy &  
Marketing  
Project Manager**

**Cactus Marketing  
Communications**

**3-18-19**

**AUTHORIZED  
SIGNATURE/NAME**

**TITLE**

**COMPANY**

**DATE**

**Supplier: Cactus Marketing Communications**

**RFP-RFQ-RLI LOCATION ATTESTATION FORM (EVALUATION CRITERIA)**

The completed and signed form and supporting information (if applicable, for Joint Ventures) should be returned with the Vendor's submittal. If not provided with submittal, the Vendor must submit within three business days of County's request. Failure to timely submit this form and supporting information may affect the Vendor's evaluation. Provided information is subject to verification by the County.

A Vendor's principal place of business location (also known as the nerve center) within Broward County is considered in accordance with Evaluation Criteria. The County's definition of a principal place of business is:

1. As defined by the Broward County Local Preference Ordinance, "Principal place of business means the nerve center or center of overall direction, control and coordination of the activities of the bidder [Vendor]. If the bidder has only one (1) business location, such business location shall be considered its principal place of business."
2. A principal place of business refers to the place where a corporation's officers direct, control, and coordinate the corporation's day-to-day activities. It is the corporation's 'nerve center' and in practice it should normally be the place where the corporation maintains its headquarters; provided that the headquarters is the actual center of direction, control, and coordination, i.e., the 'nerve center', and not simply an office where the corporation holds its board meetings (for example, attended by directors and officers who have traveled there for the occasion).

The Vendor's principal place of business in Broward County shall be the Vendor's "Principal Address" as indicated with the Florida Department of State Division of Corporations, for at least six months prior to the solicitation's due date.

Check one of the following:

- ☐ The Vendor certifies that it has a principal place of business location (also known as the nerve center) within Broward County, as documented in Florida Department of State Division of Corporations (Sunbiz), and attests to the following statements:

1. Vendor's address listed in its submittal is its principal place of business as defined by Broward County;
2. Vendor's "Principal Address" listed with the Florida Department of State Division of Corporations is the same as the address listed in its submittal and the address was listed for at least six months prior to the solicitation's opening date. A copy of Florida Department of State Division of Corporations (Sunbiz) is attached as verification.
3. Vendor must be located at the listed "nerve center" address ("Principal Address") for at least six (6) months prior to the solicitation's opening date;
4. Vendor has not merged with another firm within the last six months that is not headquartered in Broward County and is not a wholly owned subsidiary or a holding company of another firm that is not headquartered in Broward County;
5. If awarded a contract, it is the intent of the Vendor to remain at the referenced address for the duration of the contract term, including any renewals, extensions or any approved

interim contracts for the services provided under this contract; and

6. The Vendor understands that if after contract award, the County learns that the attestation was erroneous, and upon investigation determines that the error was willful or intentional on the part of the Vendor, the County may, on that basis exercise any contractual right to terminate the contract. Further any misleading, inaccurate, false information or documentation submitted by any party affiliated with this procurement may lead to suspension and/or debarment from doing business with Broward County as outlined in the Procurement Code, Section 21.119.

If the Vendor is submitting a response as a Joint Venture, the following information is required to be submitted:

- a. Name of the Joint Venture Partnership
- b. Percentage of Equity for all Joint Venture Partners
- c. A copy of the executed Agreement(s) between the Joint Venture Partners

- ☒ Vendor does not have a principal place of business location (also known as the nerve center) within Broward County.

**Vendor Information:**

Vendor Name: **Cactus Marketing Communications**

Vendor's address listed in its submittal is:

**2128 15th Street  
Denver, Colorado 80202**

The signature below must be by an individual authorized to bind the Vendor. The signature below is an attestation that all information listed above and provided to Broward County is true and accurate.

Authorized Signature/Name	Title	Vendor Name	Date
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**Supplier: Cactus Marketing Communications**

**SUBCONTRACTORS/SUBCONSULTANTS/SUPPLIERS REQUIREMENT FORM**  
**Request for Proposals, Request for Qualifications, or Request for Letters of Interest**

The following forms and supporting information (if applicable) should be returned with Vendor's submittal. If not provided with submittal, the Vendor must submit within three business days of County's request. Failure to timely submit may affect Vendor's evaluation.

- A. The Vendor shall submit a listing of all subcontractors, subconsultants and major material suppliers (firms), if any, and the portion of the contract they will perform. A major material supplier is considered any firm that provides construction material for construction contracts, or commodities for service contracts in excess of \$50,000, to the Vendor.
- B. If participation goals apply to the contract, only non-certified firms shall be identified on the form. A non-certified firm is a firm that is not listed as a firm for attainment of participation goals (ex. County Business Enterprise or Disadvantaged Business Enterprise), if applicable to the solicitation.
- C. This list shall be kept up-to-date for the duration of the contract. If subcontractors, subconsultants or suppliers are stated, this does not relieve the Vendor from the prime responsibility of full and complete satisfactory performance under any awarded contract.
- D. After completion of the contract/final payment, the Vendor shall certify the final list of non-certified subcontractors, subconsultants, and suppliers that performed or provided services to the County for the referenced contract.
- E. The Vendor has confirmed that none of the recommended subcontractors, subconsultants, or suppliers' principal(s), officer(s), affiliate(s) or any other related companies have been debarred from doing business with Broward County or any other governmental agency.

If none, state "none" on this form. Use additional sheets as needed. Vendor should scan and upload any additional form(s) in BidSync.

1. Subcontracted Firm's Name:

Subcontracted Firm's Address:

Subcontracted Firm's Telephone Number:

Contact Person's Name and Position:

Contact Person's E-Mail Address:

Estimated Subcontract/Supplies Contract Amount:

Type of Work/Supplies Provided:

2. Subcontracted Firm's Name:

Subcontracted Firm's Address:

Subcontracted Firm's Telephone Number:

Contact Person's Name and Position:

Contact Person's E-Mail Address:

**Supplier: Cactus Marketing Communications****VOLUME OF PREVIOUS WORK ATTESTATION FORM**

The completed and signed form should be returned with the Vendor's submittal. If not provided with submittal, the Vendor must submit within three business days of County's request. Failure to provide timely may affect the Vendor's evaluation. This completed form must be included with the Vendor's submittal at the time of the opening deadline to be considered for a Tie Breaker criterion (if applicable).

The calculation for Volume of Previous Work is all amounts paid to the prime Vendor by Broward County Board of County Commissioners at the time of the solicitation opening date within a five-year timeframe. The calculation of Volume of Previous Work for a prime Vendor previously awarded a contract as a member of a Joint Venture firm is based on the actual equity ownership of the Joint Venture firm.

In accordance with Section 21.31.d. of the Broward County Procurement Code, the Vendor with the lowest dollar volume of work previously paid by the County over a five-year period from the date of the submittal opening will receive the Tie Breaker.

Vendor must list all projects it received payment from Broward County Board of County Commissioners during the past five years. If the Vendor is submitting as a joint venture, the information provided should encompass the joint venture and each of the entities forming the joint venture. The Vendor attests to the following:

Item No.	Project Title	Solicitation/ Contract Number:	Department or Division	Date Awarded	Paid to Date Dollar Amount
1					
2					
3					
4					
5					
<b>Grand Total</b>					

Has the Vendor been a member/partner of a Joint Venture firm that was awarded a contract by the County?    Yes       ☐       No       ☒

If Yes, Vendor must submit a **Joint Vendor Volume of Work Attestation Form**.

**Vendor Name: Cactus Communications**

**Kristen Taylor Smith**

**Strategy & Marketing Project  
Manager**

**3-18-19**

**Authorized Signature/ Name**

**Title**

**Date**

**VOLUME OF PREVIOUS WORK ATTESTATION JOINT VENTURE FORM**

If applicable, this form and additional required documentation should be submitted with the Vendor's submittal. If not provided with submittal, the Vendor must submit within three business days of County's request. Failure to timely submit this form and supporting documentation may affect the Vendor's evaluation.

The calculation of Volume of Previous Work for a prime Vendor previously awarded a contract as a member of a Joint Venture firm is based on the actual equity ownership of the Joint Venture firm. Volume of Previous Work is not based on the total payments to the Joint Venture firm.

Vendor must list all projects it received payment from Broward County Board of County Commissioners during the past five years as a member of a Joint Venture. The Vendor attests to the following:

Item No.	Project Title	Solicitation/ Contract Number:	Department or Division	Date Awarded	JV Equity %	Paid to Date Dollar Amount
1						
2						
3						
4						
5						
Grand Total						

Vendor is required to submit an executed Joint Venture agreement(s) and any amendments for each project listed above. Each agreement must be executed prior to the opening date of this solicitation.

**Vendor Name: Cactus Communications**

**Kristen Taylor Smith**

**Strategy & Marketing Project  
Manager**

**3-18-19**

**Authorized Signature/ Name**

**Title**

**Date**

**Supplier: Cactus Marketing Communications**

**SCRUTINIZED COMPANIES LIST REQUIREMENT CERTIFICATION FORM**

The completed and signed form(s) should be returned with the Vendor's submittal. If not provided with submittal, the Vendor must submit within three business days of County's request. Vendor may be deemed non responsive for failure to fully comply within stated timeframes.

Any company, principals, or owners on the Scrutinized Companies with Activities in Sudan List, the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, or the Scrutinized Companies that Boycott Israel List is prohibited from submitting a response to a solicitation for goods or services in an amount equal to or greater than \$1 million.

The Vendor, by virtue of the signature below, certifies that:

- a. The Vendor, owners, or principals are aware of the requirements of Sections 287.135, 215.473, and 215.4725 Florida Statutes, regarding Companies on the Scrutinized Companies with Activities in Sudan List, the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, or the Scrutinized Companies that Boycott Israel List; and
- b. The Vendor, owners, or principals, are eligible to participate in this solicitation and are not listed on either the Scrutinized Companies with Activities in Sudan List, the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, or the Scrutinized Companies that Boycott Israel List; and
- c. If awarded the Contract, the Vendor, owners, or principals will immediately notify the County in writing if any of its principals are placed on the Scrutinized Companies with Activities in Sudan List, the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, or the Scrutinized Companies that Boycott Israel List.

<b>Kristen Taylor Smith</b>	<b>Strategy &amp; Marketing Project Manager</b>	<b>Cactus Marketing Communications</b>	<b>3-18-19</b>
<b>Authorized Signature/Name</b>	<b>Title</b>	<b>Vendor Name</b>	<b>Date</b>



**Supplier: Cactus Marketing Communications**

**Security Requirements**

**A. General Security Requirements and Criminal Background Screening:**

1. All contractor and sub-contractor personnel requiring unescorted access to Broward County facilities must obtain a County issued contractor identification badge (contractor ID badge); except as specifically stated herein.
2. The background screening requirements for obtaining a contractor ID badge will depend on the facility to which unescorted access is being requested. Contract Administrators or designees and contractors may contact Broward County Security at (954) 357-6000 or [FMsecurity@broward.org](mailto:FMsecurity@broward.org) for the required background screening requirements associated with access to specific facilities. Contract Administrators will communicate all current and appropriate requirements to the contractor and sub-contractor throughout the contract period.

**B. General Facilities:**

1. Contractor and sub-contractor personnel servicing and requiring unescorted access to General Facilities must have a County issued contractor ID badge (contractor ID badge) which will be the responsibility of the contractor to obtain. Depending upon the request, the badge may carry electronic access privileges. The badge must be visible and worn at all times together with the contractor's company/business contractor ID badge. Similar to employee security/ID badges, requests for contractor ID badges are initially approved by the requesting agency director or designee and then submitted to Facilities Management Division (FMD) Security for final approval.
2. The issuance of a contractor ID badge for unescorted access to General Facilities requires a "Level 1" FDLE background check, which can be conducted by the Florida Department of Law Enforcement (FDLE). This "Level 1" FDLE background check is the contractor's responsibility and should be included in the bid price. FDLE background checks can be done by the contractor by phone at (850) 410-8109 or online at <https://web.fdle.state.fl.us/search/app/default>.
3. Upon completion of the background check, the contractor must attach a copy of the results to the contractor's application for a contractor ID badge. The Project Manager or designee utilizing the service of the contractor will be the "Sponsor" and will either provide the contractor with a Contractor ID Badge Request Form or assist the contractor in completing an on-line application for the County issued contractor ID badge.
4. Requests for a contractor ID badge requiring an FDLE background check may require lengthy processing and review by the Broward Sheriff's Office (BSO). Contractors and subcontractors must therefore submit the request to Broward County Security at least two (2) weeks prior to the start of service by the contractor. When identification badges are ready, Broward County Security will contact the contractor to arrange pick up. Upon pick up, the applicant must present a valid Florida identification and must be accompanied by his or her supervisor. Broward County Security will then supply contractor ID badge valid for the anticipated period within which the work will be performed. The validity period must be clearly stated on the Contractor ID Badge Request Form; however, the period of validity will not exceed one (1) year. Background checks will be required for renewal of contractor ID badge. At the termination of the contract and separation of employee services, the contractor is responsible for the collection and return of all contractor ID badge to the Project Manager and/or to Broward County Security.
5. Compliance with the County's security requirements is part of the overall contract performance evaluation. Final payment will, in part, be contingent on the return of all contractor ID badges issued to contractor personnel.
6. Broward County Security is located at Governmental Center East, 115 South Andrews Avenue Fort Lauderdale, FL 33301. Telephone (954) 357-6000.
7. All contractors must wear distinctive and neat appearing uniforms with vendor's company

name. Sub-contractor personnel must also have Broward County issued contractor IDs and meet the same security requirements and uniform standards as the primary contractor.

8. Contractors will not be allowed unescorted on the job site without proper County issued contractor ID badges.

**C. Facilities Critical to Security and Public Safety:**

Many Broward County government facilities will have areas designated as critical to security and public safety, pursuant to Broward County Ordinance 2003-08 Sections 26-121 and 26-122, as may be amended. The issuance of a contractor ID badge for unescorted access to facilities critical to security and public safety may entail a comprehensive statewide and national background check. Unescorted access to certain facilities occupied by the Broward Sheriff's Office (BSO) and the State Attorney's Office will require a national fingerprint-based records check per the Criminal Justice Information System (CJIS) policy.

A contractor employee found to have a criminal record consisting of felony conviction(s) shall be disqualified from access to the State Attorney's Offices and certain BSO facilities. A contractor employee with a record of misdemeanor offense(s) may be granted access if the System Security Officer (CSO), Terminal Access Coordinator (TAC), and FDLE determines that the nature of the offense(s) do not warrant disqualification. Applicants shall also be disqualified on the basis of confirmations that arrest warrants are outstanding for such applicants.

**D. Contractor Work Crews:**

Background investigations are generally not required for each member of a contractor work crew working on county premises and outside a building or structure. Examples are landscape crews and roofers. If it is necessary to enter the building or structure unescorted, these work crew members should obtain a contractor ID badge. If not, work crew members must be escorted at all times by the project manager, or designee, and must be under the direct supervision of a foreperson for the contractor. The foreperson must be aware of the crew members' whereabouts, has completed the appropriate background check for the location and type of work being undertaken, and has been issued and is displaying a contractor ID badge.

All members of a night cleaning crew must complete a background investigation appropriate to the requirements of the facility and so should all work crew members not escorted when working at a critical county facility.

Notwithstanding, the using agency is best positioned and suited to determine the safeguards and requirements that should be in place to manage the risks and consequences associated with the roles and activities of contractor, subcontractor, and work crews, when requesting a contractor ID badge. The agency is aware of the characteristics of the client population being served by the classes of persons, the need to safeguard high-value assets, and the requirement to comply with all statutory requirements governing background investigations.

**E. Other Vendors:**

Consultants, delivery personnel, and vending machine operators, without a County issued contractor badge, may obtain a Visitor pass and should be escorted by County personnel when accessing and working in designated non-public and employee work areas at both general facilities and facilities critical to security and public safety.

**F. Port Everglades Locations:**

1. The Port Everglades Department requires persons to present, at port entry, a valid driver's license, and valid reason for wishing to be granted port access in order to obtain a temporary/visitor ID badge. For persons who will visit the Port more than 15 times in a 90 day period, a permanent identification badge must be obtained and paid for by the contractor for all employees, subcontractors, agents and servants visiting or working on the port project. A restricted access badge application process will include fingerprints and a comprehensive background check. Badges must be renewed annually and the

fees paid pursuant to Broward County Administrative Code, Section 42.6. For further information, please call 954-765-4225.

2. All vehicles that are used regularly on the dock apron must have a Dockside Parking Permit. Only a limited number of permits will be issued per business entity. The fee is \$100.00 per permit/vehicle. Individuals requesting a permit must possess a valid Port-issued Restricted Access Area badge with a "Dock" destination. Requests for Dockside Parking Permits must be submitted in writing, on company letterhead, to the ID Badge Office. Applicants must demonstrate a need for access to the dock apron. Requests shall be investigated, and approved, if appropriate justification is provided. Supporting documentation must be supplied, if requested. Dock permits are not transferable and must be affixed to the lower left corner of the permitted vehicle's windshield. Should the permit holder wish to transfer the permit to another vehicle during the term of issuance, the permit will be removed and exchanged at no charge for a new permit. Only one business entity representative will be permitted on the dock at a time at the vessel location.
3. The Federal Government has instituted requirements for a Transportation Worker Identification Credential (TWIC) for all personnel requiring unescorted access to designated secure areas within Port Everglades. The contractor will be responsible for complying with the applicable TWIC requirements. For further information, please call 1-855-347-8371, or go on line to <https://www.tsa.gov/for-industry/twic>.

**G. Airport Security Program and Aviation Regulations:**

1. Consultant/contractor agrees to observe all security requirements and other requirements of the Federal Aviation Regulations applicable to Consultant/contractor, including without limitation, all regulations of the United States Department of Transportation, the Federal Aviation Administration and the Transportation Security Administration, and the Consultant/contractor agrees to comply with the County's Airport Security Program and the Air Operations area (AOA) Vehicle Access Program, and amendments thereto, and to comply with such other rules and regulations as may be reasonably prescribed by the County, and to take such steps as may be necessary or directed by the County to insure that sub lessees, employees, invitees and guests observe these requirements. If required by the Aviation Department, Consultant/contractor shall conduct background checks of its employees in accordance with applicable Federal regulations.
2. If as a result of the acts or omissions of Consultant/contractor, its sub lessees, employees, invitees or guests, the County incurs any fines and/or penalties imposed by any governmental agency, including without limitation, the United States Department of Transportation, the Federal Aviation Administration or the Transportation Security Administration, or any expense in enforcing any federal regulations, including without limitation, airport security regulations, or the rules or regulations of the County, and/or any expense in enforcing the County's Airport Security Program, then consultant/contractor agrees to pay and/or reimburse the County all such costs and expenses, including all costs of administrative proceedings, court costs, and attorneys' fees and all costs incurred by County in enforcing this provision. Consultant/contractor further agrees to rectify any security deficiency or other deficiency as may be determined as such by the County or the United States Department of Transportation, Federal Aviation Administration, the Transportation Security Administration, or any other federal agency. In the event consultant/contractor fails to remedy any such deficiency, the County may do so at the cost and expense of consultant/contractor. The County reserves the right to take whatever action is necessary to rectify any security deficiency or other deficiency.
3. Operation of Vehicles on the AOA: Before the consultant/contractor shall permit any employee of consultant/contractor or any sub consultant/subcontractor to operate a motor vehicle of any kind or type on the AOA (and unless escorted by an Aviation Department approved escort), the consultant/contractor shall ensure that all such vehicle operators possess current, valid, and appropriate Florida driver's licenses. In addition, any motor vehicles and equipment of consultant/contractor or of any sub consultant/subcontractor operating on the AOA must have an appropriate vehicle identification permit issued by the Aviation Department, which identification must be

displayed as required by the Aviation Department.

4. Consent to Search/Inspection: The consultant/contractor agrees that its vehicles, cargo, goods, and other personal property are subject to being inspected and searched when attempting to enter or leave and while on the AOA. The consultant/contractor further agrees on behalf of itself and its sub consultant /subcontractors that it shall not authorize any employee or other person to enter the AOA unless and until such employee other person has executed a written consent-to-search/inspection form acceptable to the Aviation Department. Consultant/contractor acknowledges and understands that the forgoing requirements are for the protection of users of the Airport and are intended to reduce incidents of cargo tampering, aircraft sabotage, thefts and other unlawful activities at the Airport. For this reason, consultant/contractor agrees that persons not executing such consent-to-search/inspection form shall not be employed by the consultant/contractor or by any sub consultant/contractor at the Airport in any position requiring access to the AOA or allowed entry to the AOA by the consultant/contractor or by any sub consultant/contractors.
5. The provisions hereof shall survive the expiration or any other termination of this contract.

#### **H. Water and Wastewater Services (WWS):**

1. Contractors/Consultants may receive a WWS ID Badge and/or Access Card and/or Keys while working at WWS facility work sites. These items provide modified access to certain areas and systems otherwise restricted to non-WWS employees and can only be obtained from the WWS Security Manager. These items may be rescinded at the discretion of the WWS Security Officer. The WWS ID Badge, Access Card and/or Keys remain the property of Broward County and must be returned to your WWS contact person at the end of the contract/project.
2. All contractors will complete and sign the WWS Contractor/Consultant Security Memorandum and provide a copy of their Driver's License to be recorded on Schlage Card Access System Profile.
3. A lost or stolen ID Badge and/or Access Card and/or Keys must be reported to the Security Manager immediately.
4. WWS may terminate access to any contractor who acts inappropriately while on County property and has the right to contact BSO if necessary to have the contractor removed and/or file charges against them.

#### **I. Additional Security Requirements for Parks and Recreation:**

1. Contractor expressly understands and agrees that a duty is hereby created under this Contract that requires contractor to provide ongoing disclosure throughout the term of this Contract as provided for herein relative to the criminal background screening required by this Section.
2. Contractor shall perform criminal background screening as identified in Item 3 below on its officers, employees, agents, independent contractors and volunteers who will be working under this contract in any County park ("collectively referred to as "County Park Property"). Further, if contractor is permitted to utilize subcontractors under this contract, contractor shall perform or ensure that the background screening as required in Item 3 below is conducted on any permitted subcontractor, which term includes the subcontractor's officers, employees, agents, independent contractors and volunteers who will be working under this contract on County Park property.
3. Contractor shall not permit any person who is listed as a sexual predator or sexual offender on the Florida Department of Law Enforcement, Sexual Offenders and Predators Website or the United States Department of Justice, National Sex Offender Public Website, to provide any services for contractor on County Park Property. All persons subject to the criminal background screening under this contract shall be rescreened annually based on the date of initial screening.
4. Contractor shall maintain copies of the results of the criminal background screening required by this Section for the term of this contract and promptly forward copies of same to County, upon its request.
5. Contractor shall be required to furnish to County's Parks and Recreation Project Manager, on a monthly basis, an Affidavit affirming the persons listed in the Affidavit have been background screened as required in Item 3 above and have been deemed eligible by



- contractor to work on County Park property. Contractor's monthly Affidavit shall update information from the previous Affidavit by reconfirming the status of persons who have previously been deemed eligible as provided for above and updating the list, when applicable, to specifically identify new persons providing services for contractor under this Contract who have been background screened as required in Item 3 above and deemed eligible to work on County Park Property. The Contract Administrator may, in his or her discretion, permit contractor to furnish the monthly Affidavit in an electronic format.
6. In the event contractor obtains, or is provided, supplemental criminal background information, including police reports and arrest information, which potentially disqualifies a person previously deemed eligible by contractor to provide services under this contract, contractor shall take immediate action to review the matter; however, during such review time and until a determination of eligibility is made by contractor based on the requirements of this Section, contractor shall immediately cease allowing the person to work on County Park Property. Additionally, contractor shall be required to inform any person background screened pursuant to this Section who is providing services under this contract, to notify contractor within forty-eight (48) hours of any arrest related to sexual misconduct which has occurred after the person was deemed eligible to work on County Park Property.
  7. Contractor shall, by written contract, require its permitted subcontractors to agree to the requirements and obligations of this Section.
  8. County may terminate this contract immediately for cause, with Notice provided to contractor, for a violation related to contractor's failure to perform the required background screening on its officers, employees, agents, independent contractors and volunteers who will be working under this Agreement on County Park Property. County may also terminate this contract immediately for cause, with Notice provided to contractor, if County determines contractor failed to ensure that its permitted subcontractors, as defined in Item 2 above, have been background screened as required in this section prior to performing any services under this Agreement on County Park Property. Contractor will not be subject to immediate termination in the event County determines a violation of this Section was outside the reasonable control of contractor and contractor has demonstrated to County compliance with the requirements of this Section.
  9. County may terminate this contract for cause if contractor fails to provide the monthly Affidavit to County as provided for under Item 5 above, and contractor does not cure said breach within five (5) days of Notice provided to contractor.