

# ILLINOIS MEDICAL DISTRICT COMMISSION



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## ***REQUEST FOR PROPOSALS*** ***for*** ***Marketing and Public Relations Services*** **IMDC 13-006**

# ILLINOIS MEDICAL DISTRICT COMMISSION

## IMDC RFP for Marketing and Public Relations Services

The Illinois Medical District Commission (the "IMDC") is requesting Proposals from responsible Firms seeking to provide marketing and public relations services to further the IMDC's objectives. Below is a brief overview of our needs with detailed requirements in subsequent sections of this solicitation. If you are interested and able to meet these requirements, please submit a Proposal. For the purposes of this solicitation a "Proposal" or "Proposals" shall also refer to a Firm's "Offer", "Qualifications" and/or "Response" in connection with this solicitation. A Respondent may submit Proposals under this solicitation for both Marketing and Public Relations Services or for either just Marketing Services or just Public Relations Services. This solicitation was prepared in accordance with the IMDC Procurement Policy. A copy of such policy is available at <http://www.imdc.org/procurement-policy-guidelines>.

### Brief Overview:

The IMDC is issuing this Request for Proposals for Marketing and Public Relations Services. The IMDC is seeking written Proposals from qualified Firms to provide marketing and public relations services to promote the brand, assets and strategic vision of the Illinois Medical District ("IMD").

The IMDC is a political subdivision, unit of local government and, body politic and corporate that was formed by an act of the Illinois State Legislature in 1941 (70 ILCS 915/0.01, *et seq.*) (the "Act") for the purpose of administering, developing and zoning property within the District to attract and retain academic centers of excellence, viable healthcare facilities, medical research facilities, and emerging high technology enterprises. Its mission is to attract both medically-related commerce and research and new business ventures for the economic vitality and general welfare of the State of Illinois, Cook County, and the City of Chicago. The IMD strives to be a leader in patient care and medical research by utilizing its diversity and unique assets to drive economic growth. The seven-member IMDC governs the District's growth, development, and mission.

The IMD is comprised of a world-class collaboration of hospitals, universities, institutes, social services, and technology commercialization facilities, located on the near west side of the City of Chicago, Illinois in Cook County that is bounded by Congress Street on the north, Ashland Avenue on the east, Oakley Boulevard on the west, and the Union Pacific inter-modal yard on the south. The Illinois Medical District is comprised of approximately 560 acres. The IMDC owns approximately 90 acres of real estate within its jurisdictional boundaries, including both improved and unimproved parcels. Included in the portfolio is vacant unimproved real estate, improved real estate with buildings under lease or to be leased and improved real estate under long term ground lease.

The IMD recently concluded a strategic planning process in consultation with its major partner institutions located within the IMD. The resulting strategic plan will guide the IMDC as it strives to achieve its overall mission. The plan defines four distinct strategies around infrastructure and real estate development, community health, translational research and clinical data. A number of tactical initiatives are identified around each strategy to achieve the IMD's mission of becoming a leader in patient care and medical research while driving economic growth.

In this document the IMDC will be referred to as "Commission", "we" or "us". The person submitting a Proposal will be referred to as "Firm", "Vendor", "Respondent" or "You". "We" is used appropriate to the context.

Please read the entire solicitation package and submit your Proposal for evaluation in accordance with all instructions.

***NON-DISCRIMINATION POLICY*** In compliance with the State and Federal Constitutions, the Illinois Human Rights Act, the U.S. Civil Rights Act, and Section 504 of the Federal Rehabilitation Act, the IMDC does not discriminate in employment, contracts, or any other activity.

## SECTION 1 - INSTRUCTIONS, DATES, RESERVATIONS AND OTHER GENERAL INFORMATION

- 1.1 SUBMISSION OF QUESTIONS:** If you have a question or suspect an error, you must immediately notify the Project Contact identified in this section. In accordance with the provisions of the Quiet Period associated with the solicitation and further specified in Section 1.2, do not discuss the solicitation or your Proposal, directly or indirectly, with any IMDC officer or employee other than the IMDC Project Contact. The IMDC will only acknowledge written answers to questions sent via email to the Project Contact. Telephone calls regarding the solicitation are not permitted. Questions and Answers regarding this RFP will be posted to [www.imdc.org](http://www.imdc.org).

### PROJECT CONTACT:

Heather Tarczan	Phone: (312) 738-5800
Director of Communications & Administration	Fax: (312) 738-5801
Illinois Medical District Commission	TDD: (312) 738-5804
2100 W Harrison St, Chicago, IL 60612	
<a href="mailto:htarczan@medicaldistrict.org">htarczan@medicaldistrict.org</a>	

- 1.2 QUIET PERIOD:** The Quiet Period is intended to establish guidelines by which the Commission and Commission staff will communicate with prospective vendors during the pendency of a solicitation. The objectives of such a Quiet Period are to ensure that prospective vendors competing for contracts with the Commission have equal access to information regarding selection parameters, communications related to selection are consistent and accurate and the process of selecting vendors is transparent, efficient, diligent and fair. The following guidelines will be instituted during the pendency of solicitations issued by the Commission:

- A quiet period will commence upon the issuance of a solicitation by the Commission and/or Commission staff and end upon award of any resulting contracts from the subject solicitation.
- Initiation, continuation, and conclusion of the quiet period shall be publicly communicated to prevent inadvertent violations.
- All IMDC Commissioners and staff shall refrain from communicating with potential vendors regarding any product or service related to any pending solicitation throughout the quiet period and shall refrain from accepting meals, travel, hotel or other value from the potential vendors.
- Throughout the quiet period, if any Commissioner is contacted by a potential vendor, the Commissioner shall refer the vendor to the Project Contact.
- The quiet period does not prevent Commission approved due diligence or communications with an existing vendor that happens to be a competing vendor in the ordinary course of services provided by such vendor; however, discussions related to the pending selection shall be prohibited during such activities.
- A potential vendor may be disqualified from the consideration under the solicitation for a knowing violation of this quiet period policy.

- 1.3 PRE-PROPOSAL CONFERENCE / SITE VISIT:** No

- 1.4 PROPOSALS DUE DATE, TIME AND SUBMISSION LOCATION:** Due Date: July 3, 2013 Time: 2:00 PM

**DELIVER PROPOSALS TO:**  
Illinois Medical District Commission  
Attn: Heather Tarczan  
2100 W. Harrison St. Chicago, IL 60612

**LABEL OUTSIDE OF ENVELOPE / CONTAINER:**  
RFP for Marketing and Public Relations Services  
Vendor Name & Address

We will open Proposals at the Due Date, Time and Delivery Location. Prior to the due date, you may mail or hand-deliver Proposals, modifications, and withdrawals. We do not allow e-mail, fax, or other electronic submissions. We must physically receive submissions as specified; it is not sufficient to show you mailed or commenced delivery before the due date and time. We will not consider Proposals, modifications or withdrawals received after the due date and time. All times are Central Time.

**1.5 NUMBER OF COPIES:** You must submit a signed original and four (4) copies of the Proposal in a sealed envelope. In addition, you must submit one (1) copy on a flash drive in PDF format. You must submit a written pricing proposal in a separate sealed envelope, including a separate flash drive with the price flash drive sealed in the pricing envelope. If you are requesting confidential treatment or any portion of your submittal, you must make that request in the form and manner specified elsewhere in this solicitation. A request for confidential treatment will not supersede the IMDC's legal obligations under Illinois Freedom of Information Act (FOIA) (5 ILCS 140).

**1.6 OFFER FIRM TIME:** Your Proposal must remain firm as an offer for 180 days from opening.

**1.7 SECURITY:** None

**1.8 KEY DATES:**

RFP Issued:	June 7, 2013
Proposal Due Date:	July 3, 2013

**1.9 AWARD:** We will post a notice to the IMDC website identifying the apparent awardee(s). More than one Vendor may be selected for an award either for combined Marketing and Public Relations services, or separately for Marketing services, or separately for Public Relations services. The notice extends the Proposal Firm Time until we sign a contract or determine not to sign a contract. We may accept or reject your Proposal as submitted, or may require contract negotiations. If negotiations do not result in an acceptable agreement, we may reject your Proposal.

**1.10 PUBLIC RECORDS AND REQUESTS FOR CONFIDENTIAL TREATMENT:** Proposals become the property of the IMDC and will not be returned to Respondents. Your Proposal may be open to the public under the Illinois Freedom of Information Act (FOIA) (5 ILCS 140) and other applicable laws and rules. You may request that certain information be treated as exempt. The IMDC reserves the right to review such requests on a case-by-case basis. A request for confidential treatment will not supersede the IMDC's legal obligations under Illinois Freedom of Information Act (FOIA) (5 ILCS 140). We will not honor requests to exempt entire Proposals. You must show the specific grounds in FOIA or other law or rule that support exempt treatment. Regardless, we may disclose the successful Respondent's name, the substance of the Proposal, and the price. If you request exempt treatment, you must submit an additional copy of the Proposal with exempt information deleted. This copy must tell the general nature of the material removed and shall retain as much of the Proposal as possible. You will be responsible for any costs or damages associated with our defending your request for exempt treatment. You agree the IMDC may copy the Proposal to facilitate evaluation, or to respond to requests for public records. You warrant that such copying will not violate the rights of any third party.

**1.11 RESERVATIONS:** You must read and understand the solicitation and tailor your Proposal and activities to ensure compliance. We reserve the right to amend the solicitation; reject any or all Proposals; to award by item, group of items, or grand total; and to waive minor defects. We may request a clarification; interview staff; request a presentation; or otherwise verify the contents of the Proposal, including information about subcontractors and suppliers. We may request Best & Final Offers when appropriate. We will make all decisions on compliance, evaluation, terms and conditions, and shall make decisions solely in the best interests of the IMDC. This competitive process may require that you provide additional information and otherwise cooperate with us. If you do not comply with requests for information and cooperate, we may reject your Proposal. You have no right to an award by submitting a Proposal, nor do you have the right to a contract based on our posting your name in a Bulletin notice. We are not responsible for and will not pay any costs associated with the preparation and submission of your Proposal. If you are the awardee, you shall not commence work prior to the date all parties execute the contract, unless approved in writing in advance by the IMDC.

**1.12 GOVERNING LAW AND FORUM:** Illinois law and rule govern this solicitation and any resulting contract. You must bring any action relating to this solicitation or any resulting contract in the appropriate court in Illinois.

## SECTION 2 - HOW WE WILL EVALUATE PROPOSALS

**2.1 EVALUATION:** We evaluate following categories of information: Respondent Qualifications, Related Experience and References, Team Composition, Project Approach, Pricing, Bonding Capacity, Insurance Coverage and Litigation Status. We will consider the information you supply or do not supply, and the quality of that information when evaluating your Proposal. If we find a failure or deficiency, we may have to reject the Proposal or reflect that in the evaluation.

### 2.1.1 Respondent Proposals:

- a. **Qualifications:** A brief description of the Respondent, including its location, years in business, history and philosophy. Include a description of Respondent's applicable experience working in healthcare as well as any relevant work Respondent has done on regional, national and international platforms. Include an outline of the Respondent's ownership, officers and executive management. Please include a narrative describing the Respondent's capabilities and unique qualifications as they pertain to the specified services of this solicitation.
- b. **Related Experience and References:** Please provide a listing and description of at least five (5) active account relationships that demonstrates the Respondent's experience in providing Marketing and Public Relations services. Please note any relevant experience working with the IMDC or similar entities. List the account relationships in order of priority with the most relevant project listed first indicating:
  - (1) The range of services provided
  - (2) Goals of the engagement and outcomes achieved
  - (3) Five (5) references and current contact information for each of the engagements.
- c. **Team Composition:** Please provide a description of the Respondent's proposed Marketing and Public Relations team. Respondent shall identify all key personnel as well as consultants. Please identify Respondent day-to-day contact personnel for communicating with IMDC on all project related matters. Provide resumes for all key personnel including educational background, certifications, training and detailed descriptions of roles in past projects.
- d. **Project Approach to Required Services** (from Section 3.2): Please include:
  - (1) A narrative demonstrating an understanding of the scope of the services to be performed;
  - (2) An overview of the intended approach to providing Marketing and Public Relations services including techniques to achieve the broadest range of interest and attention to the IMD; and,
  - (3) A description of how the approach will maximize return to the client.
- e. **Pricing:** Respondent shall list the method and rates of compensation for services provided. Pricing shall be provided as outlined in Section 1.5 and in the Proposal Instructions (Price Submission).
- f. **Bonding Capacity, Insurance Coverage:**
  - (1) Provide bonding capacity information as applicable,
  - (2) Provide a certificate of insurance showing Respondent's types and current limits of liability insurance, and,
  - (3) Note any pending litigation to which the Respondent is currently subject or to which Respondent has been a party in the last five years.

You must at all times have financial capacity sufficient, in the opinion of the IMDC, to ensure performance of the contract and must provide proof upon request. The IMDC may terminate the Contract, consistent with the termination for cause provision of this Contract, if the Respondent lacks the financial capacity to perform under the Contract. We may require that a Respondent correct any deficiencies as a condition of further evaluation.

### **Evaluation Committee and Short-listing Process**

An Evaluation Committee ("EC"), which will include IMDC staff, will review and evaluate the Proposals. The IMDC reserves the right to enlist independent consultants to assist with the evaluation of all or any portion of a Proposal, as it deems necessary. The EC will first assess the Respondent's compliance with and adherence to the requirements of the solicitation. Any Proposal which is incomplete and missing key components necessary to fully evaluate the response may, at the discretion of the IMDC, be rejected from further consideration due to "non-responsiveness" and rated Non-Responsive.

The EC will then evaluate the extent to which a Proposal meets the project requirements set forth in the solicitation. The focus of the evaluations will be on the Respondent's understanding and approach, qualifications, related experience, project approach, team composition, and other factors based on the evaluation criteria outlined in this Section of this solicitation. Price, as outlined in Section 4 of this solicitation, will also be an evaluation factor. The EC may also review any other information that is available to it, including but not limited to information gained by checking references and by investigating the Respondent's financial condition. The IMDC reserves the right to seek clarification of any information that is submitted by any Respondent in any portion of its Proposal or to request additional information at any time during the evaluation process. Any material misrepresentation made by a Respondent may void the Proposal and eliminate the Respondent from further consideration.

After the EC completes its review of Proposals, it may submit to the IMDC: (1) a recommendation to select one or more Respondent(s) or (2) a recommendation to reject any or all Proposals. If the IMDC concurs with the selection recommendation from the EC, the negotiation will commence towards a contract with the selected Respondent(s).

**Conflict of Interest:** The EC will consider any information regarding Respondent, including information contained in Respondent's Proposal, that may indicate any conflicts (or potential conflicts) of interest which might compromise Respondent's ability to successfully perform the proposed services or undermine the integrity of the competitive-procurement process. If any Respondent submitting a Proposal has provided any services for the IMDC in researching, consulting, advising, drafting or reviewing this solicitation or any other services related to the preparation of this solicitation, such Respondent will be disqualified from further consideration.

**2.2 AWARD:** The IMDC, in its sole and absolute discretion, may award to the Respondents whose Proposals are considered the best of those submitted and with whom the IMDC is able to negotiate fair and reasonable terms.

The IMDC may request the selected Respondent(s) to participate in negotiations, including but not limited to negotiations regarding price. The IMDC's request that the selected Respondents negotiate is not a commitment by the IMDC to award an Agreement. If the IMDC determines that it is unable to reach an acceptable Agreement with a selected Respondents, including failure to agree on a fair and reasonable price for services, or any other terms or conditions, the IMDC may terminate negotiations with such selected Respondents, and may commence negotiations with any of the other Respondent(s) until such time as the IMDC has negotiated an Agreement meeting its needs.

We will attempt to negotiate a fair and reasonable agreement with the Respondents with the best Proposal. If we cannot negotiate a fair and reasonable agreement, we reserve the right to award and negotiate with the next highest ranked Respondents. The IMDC also reserves the right to make no selection as a result of this solicitation. We will determine the awards by considering the Proposal, the Respondent's qualifications and other relevant factors in the sole discretion of the IMDC.

## **SECTION 3 - SPECIFICATIONS / QUALIFICATIONS / STATEMENT OF WORK**

### **3.1 IMDC's BUSINESS NEEDS**

The IMDC recently concluded an aggressive strategic planning process that collected and analyzed the thoughts of senior leadership from the hospitals and academic research institutions, and other key stakeholders including private sector business leaders and governmental and community leaders, to determine a new direction to achieve the IMDC's mission to enhance medical education, research and commercialization of new technology. With this new vision now in place, the IMDC seeks the services of a firm or firms to help communicate, build support, and promote the new direction among a host of different audiences.

## **3.2 REQUIRED SERVICES:**

The professional marketing and public relations services shall include all or any combination of the services described herein on an as needed basis.

- 3.2.1 Develop a comprehensive marketing and public relations plan for the IMD. The plan should promote and communicate the Districts' strategic plan, vision, advantages and priorities. The plan shall be applicable to a multitude of audiences including, but not limited to: the media, governmental leaders, influencers of public opinion, community organizations, partnering institutions, entities and stakeholders operating within the IMD, real estate developers, prospective domestic and international businesses looking to locate to the IMD and medical and healthcare professional organizations and associations. The plan shall utilize traditional and social media.
- 3.2.2 Develop a plan to include frequently refreshed content for the IMD and its social media presence, keeping the IMDC relevant; manage all social media content and updates. Ensure search engine optimization. Explain how often your plan would refresh content for outlets and how to reach a multitude of audiences (as described in 3.2.1) including but not limited to Face Book and Twitter.
- 3.2.3 Determine innovative means for the IMD to market itself to others through unpaid-advertising and earned media to increase its brand recognition throughout Chicago, the State of Illinois, the Midwest region, nationally and internationally.
- 3.2.4 Capacity to develop a portfolio of marketing materials available in print and electronic formats.
- 3.2.5 Develop media opportunities including editorial content on relevant subject matter for the IMD; organize press events, as needed.
- 3.2.6 Knowledge of AP Style writing.
- 3.2.7 Develop a calendar of relevant events, seminars, workshops, conferences and conventions at which the IMD should have a presence and/or speaking role.
- 3.2.8 Follow trends in areas including medical patient care, healthcare delivery and other policy areas relevant to the IMDC's strategic vision and provide applicable recommendations.
- 3.2.9 Provide IMDC staff media training, as requested.
- 3.2.10 Provide messaging sessions, brand identity, recommendations and counsel with respect to media relations and public speaking as requested.
- 3.2.11 Provide daily and/or weekly media monitoring reports, including access to media monitoring tools such as Cision, Burrell, or similar.
- 3.2.12 Ability to provide reports and show measurable increase of social media usage.
- 3.2.13 Provide recommendations and direction on additional forms of outreach including podcasts, v-casts, e-newsletters, etc.
- 3.2.14 Possess resources, contacts and relationships with entities external to the IMDC, including governmental officials and agencies at all levels and relevant professional organizations and associations and have the ability to provide introductions as needed to the IMDC.
- 3.2.15 Develop a plan to work with the four (4) major hospitals and District partners in creating unified messaging and materials, as applicable, as well as best-practices to keep all entities informed of "news", relevant meetings and happenings; share information and incorporate into IMD materials/outreach.
- 3.2.16 Assist with IMDC events as needed.
- 3.2.17 Attend Commission Meetings year-round.
- 3.2.18 Other creative/innovative ideas.

## **3.3 REPORTING, STATUS AND MONITORING**

- 3.3.1 At the IMDC's option the Parties will work together to monitor performance. This may include use of a performance scorecard with conditions, milestones, requirements, or timetables that must be met before additional steps may be taken, or payment is due. The scorecard may also record matters related to price, service, quality and other factors deemed important.

- 3.3.2 Vendor shall cooperate with the IMDC in this monitoring activity, which may require that Vendor report progress and problems (with proposed resolutions), provide records of its performance, participate in scheduled meetings and provide management reports as requested by the IMDC.

### **3.4 VENDOR AND STAFF REQUIREMENTS**

- 3.4.1 The Vendor must be incorporated to do business in the State of Illinois. Vendor will provide any professional organization, association or affiliations relevant to the services to be provided.
- 3.4.2 The Vendor must be in good standing with the Illinois Department of Revenue.
- 3.4.3 The Vendor must have a minimum of five years related experience.
- 3.4.4 The Vendor must have the ability to effectively provide marketing and public relations services, including production and distribution of materials by use of print, social media and multi-media.
- 3.4.5 The Vendor must provide the resume(s) of all staff to be assigned to IMDC projects.
- 3.4.6 The Vendor must provide five (5) references from established private firms or government agencies, other than the procuring agency, that can attest to your experience and ability to perform the contract subject of this solicitation. You must provide the name, contact information and a description of the services provided. You must attach your references with the responsibility forms.
- 3.4.7 If Vendor or any of its team members is a registered lobbyist within the State of Illinois or any of its political subdivisions, Vendor shall make such disclosure and identify clients currently under contract.

### **3.5 TERM OF CONTRACT AND RENEWAL**

The resulting Contract shall be for a term of three (3) years. The IMDC reserves the right to renew for a total of three years in one of the following manners:

- One renewal covering the entire renewal period,
- Individual one-year renewals up to and including the entire renewal period, or
- Any combination of full or partial-year renewals up to and including the entire renewal period.

The renewal period shall be subject to the same terms and conditions as the original Contract. However, the Contract may not renew automatically, nor may the Contract renew solely at the Vendor's option.

End of Instructions.



**SECTION 4 - OFFER TO IMDC**

Marketing and Public Relations Services: IMDC 13-006

The undersigned authorized representative of the identified Vendor does hereby submit this Proposal to perform in full compliance with the subject solicitation. By completing and signing this Form, we are making an offer to the IMDC that the IMDC may accept. We are also certifying to compliance with the various requirements of the solicitation and the documents contained in the solicitation.

Respondent hereby certifies that no person or entity representing their Proposal has retained a person or entity to attempt to influence the outcome of a procurement decision made by the IMDC pursuant to the IMDC Procurement Policy for compensation contingent in whole or in part upon the decision or procurement.

**Vendor Contact Person:** The contact person for purposes of responding to any questions the IMDC may have is:

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

Address \_\_\_\_\_

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

Email \_\_\_\_\_

\_\_\_\_\_  
(Vendor name and DBA)

\_\_\_\_\_  
(Signature of party authorized to bind the named Vendor)

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

Address \_\_\_\_\_

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

E-mail \_\_\_\_\_

## PROPOSAL INSTRUCTIONS

**PRICE SUBMISSION:** The Price Proposal must be submitted in a separate, sealed envelope or container in the Proposal container. The Vendor's Price Proposal shall provide the Price for services as a fixed price(s), all inclusive.

**FORMAT:** Proposals shall be prepared on standard 8 ½" x 11" letter size or 8 ½" x 14" legal size paper. The proposal contents must be organized into separate sections according to the Proposal Contents section below. The proposal sections must be clearly identified and separated with tabs.

**PROPOSAL CONTENTS:** In addition to a Price Proposal, each Proposal must include the terms listed below in the order they are listed. Portions of the Proposal containing proprietary information may be designated as such. Any confidential information must be clearly marked as CONFIDENTIAL.

**Title Page:** A page with a title and the name of the Firm submitting the proposal should be evident. The title should read as one of the following: "Response to the IMDC RFP for Marketing and Public Relations Services", or "Response to the IMDC RFP for Marketing Services (only)", or "Response to the IMDC RFP for Public Relations Services (only)". It should be located on the top half of the page. The Firm name should be located on the bottom half of the page.

**Table of Contents:** A table of contents with page numbers identifying, at a minimum, all sections below.

**Cover Letter:** Please provide a cover letter, not to exceed two pages in length, signed by an authorized representative of the Respondent that demonstrates an understanding of the IMDC's need for services and an overview of how the Firm proposes to deliver the required services.

**Qualifications:** Please provide a brief description of the Vendor, including its location, years in business, history and philosophy. Include an outline of the Vendor's ownership, officers and executive management. Please include a narrative describing the Vendor's capabilities and unique qualifications as they pertain to the specified services of this solicitation.

**Related Experience and References:** Please provide a listing and description of at least five (5) active account relationships that demonstrates the Vendor's experience in providing Marketing and Public Relations services. Please note any relevant experience working with the IMDC or similar entities. List the account relationships in order of priority with the most relevant project listed first indicating: (1) the range of services provided (2) goals of the engagement and outcomes achieved and (3) references and current contact information for each of the engagements.

**Team Composition:** Please provide a description of the Vendor's proposed Marketing and Public Relations team. Vendor shall identify all key personnel as well as consultants. Please identify Vendor key contact personnel for communicating with IMDC on all project related matters. Provide resumes for all key personnel including educational background, certifications, training and detailed descriptions of roles in past projects.

**Project Approach:** Please include (1) a narrative indicating an understanding of the scope of the services to be performed, (2) an overview of the intended approach to providing Marketing and Public Relations services including techniques to achieve the broadest range of interest and attention to the IMD, and (3) description of how the approach will maximize return to the client. See Section 3.2 for Required Services.

**Bonding Capacity, Insurance Coverage:** Please provide (1) bonding capacity information as applicable, or (2) certificates of insurance showing Respondent's types and current limits of liability insurance.

Legal Actions: Please provide a brief description listing all legal actions for the past three (3) years in which Firm or any member of the management team has been:

- Defendant in a lawsuit for deficient performance under a contract.
- Defendant in an administrative action for deficient performance on a project.
- Defendant in any criminal action related to professional services.

Special Considerations: This section is for the Respondent to describe any special situations, conditions and/ or circumstances that would be relevant to the proposed project, but has not been included in the Proposal so far because it did not fall under any category above under the Proposal Contents section of this RFP.

## **SECTION 5 - RESPONSIBILITY FORMS**

You must include all requested as part of your Proposal or risk disqualification.

We have identified various information we need in order to determine if you are eligible to contract with the IMDC and can be considered a "Responsible" Vendor.

You will need to review each of the Responsibility forms listed below, fill in all relevant blanks, and provide any requested information.

- Business and Directory Information
- Minority, Female, Person with Disability Status and Subcontracting
- Representative Lobbyist

Complete and sign the:

- Taxpayer Identification Form
- Attach references

### **Business and Directory Information**

- (a) Name of Business (Official Name and D/B/A)
- (b) Business Headquarters (include Address, Telephone and Facsimile)
- (c) If a Division or Subsidiary of another organization provide the name and address of the parent
- (d) Billing Address
- (e) Name of Chief Executive Officer
- (f) Customer Contact (include Name, Title, Address, Telephone, Toll-Free Number, Facsimile and E-mail)
- (g) Company website
- (h) Type of Organization (i.e., Sole Proprietor, Corporation, Partnership, etc. -- should be the same as on the Taxpayer ID form below)

- (i) Length of Time in Business
- (j) Annual Sales (for most recently completed Fiscal Year)
- (k) Number of Full-Time Employees (average from most recent Fiscal Year)
- (l) Type of and description of business
- (m) State of incorporation, state of formation or state of organization
- (n) Identify and specify the location(s) and telephone numbers of the major offices and other facilities that relate to the Respondent's performance under the terms of this solicitation.

**Minority, Female, Person with Disability Status and Subcontracting**

The IMDC encourages the use of vendors that are owned by Minorities, Women or Persons with Disabilities (Minority Business Enterprise, MBE).

Name of Company (and D/B/A): \_\_\_\_\_

Is your company at least 51% owned and controlled by individuals in one or more of the following categories?  
 Yes  No

If "Yes" check each that applies:

<u>Category:</u>	
Minority	<input type="checkbox"/>
Female	<input type="checkbox"/>
Person with Disability	<input type="checkbox"/>
Disadvantaged	<input type="checkbox"/>

**A business owned and controlled by females shall select and designate only one category above if the females are also minorities.** If "Yes," please identify, by checking the applicable blanks, which agency certified the business and in what category:

<u>Certifying Agency:</u>		<u>Category:</u>	
Department of Central Management Services	<input type="checkbox"/>	Minority	<input type="checkbox"/>
Women's Business Development Center	<input type="checkbox"/>	Female	<input type="checkbox"/>
Chicago Minority Business Development Council	<input type="checkbox"/>	Person with Disability	<input type="checkbox"/>
Illinois Department of Transportation	<input type="checkbox"/>		
Other (please identify): _____			

If you are not a certified MBE, do you have a written policy or goal regarding contracting or subcontracting with MBE certified vendors?  
 Yes  (attach copy) No

If "No," will you make a commitment to contact MBE certified vendors and consider them for subcontracting opportunities in relation to the subject services?  
 Yes  No

Do you plan on ordering supplies or services in furtherance of the services hereunder from MBE certified entities?  
Yes  No

If "Yes," please identify what you plan to order, the estimated value as a percentage of your total Proposal, and the names of the MBE certified vendors you plan to use.

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**Representative Lobbyist**

Is the Respondent represented by or employing a lobbyist required to register under the Lobbyist Registration Act?  
Yes  No

If yes, please identify each lobbyist, including name and address:

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Is the Respondent or any team member registered as a lobbyist within the State of Illinois or any of its political subdivisions?  
Yes  No

If yes, please identify clients currently under contract, including name and address:

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**TAXPAYER IDENTIFICATION NUMBER**

I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and

3. I am a U.S. person (including a U.S. resident alien).
- If you are an individual, enter your name and SSN as it appears on your Social Security Card.
  - If you are a sole proprietor, enter the owner's name on the name line followed by the name of the business and the owner's SSN or EIN.
  - If you are a single-member LLC that is disregarded as an entity separate from its owner, enter the owner's name on the name line and the d/b/a on the business name line and enter the owner's SSN or EIN.
  - If the LLC is a corporation or partnership, enter the entity's business name and EIN and for corporations, attach IRS acceptance letter (CP261 or CP277).
  - For all other entities, enter the name of the entity as used to apply for the entity's EIN and the EIN.

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

Business Name: \_\_\_\_\_

Taxpayer Identification Number: \_\_\_\_\_

Or Social Security Number \_\_\_\_\_

**Legal Status** (check one):

- |  |   |
|--|---|
| <input type="checkbox"/> Individual  | <input type="checkbox"/> Governmental   |
| <input type="checkbox"/> Sole Proprietor   | <input type="checkbox"/> Nonresident alien  |
| <input type="checkbox"/> Partnership   | <input type="checkbox"/> Estate or trust  |
| <input type="checkbox"/> Legal Services Corporation  | <input type="checkbox"/> Pharmacy (Non-Corp.)   |
| <input type="checkbox"/> Tax-exempt  | <input type="checkbox"/> Pharmacy/Funeral Home/Cemetery (Corp.)                           |
| <input type="checkbox"/> Corporation providing or billing medical and/or healthcare services     | <input type="checkbox"/> Limited Liability Company (select applicable tax classification) |
| <input type="checkbox"/> Corporation NOT providing or billing medical and/or healthcare services | <input type="checkbox"/> D = disregarded entity   |
|  | <input type="checkbox"/> C = corporation  |
|  | <input type="checkbox"/> P = partnership  |

How did you learn about this RFP?

- IMDC website
- Search engine
- Word of mouth
- Other

Signature: \_\_\_\_\_

Date: \_\_\_\_\_