



Chicago Teachers' Pension Fund

Request for Proposal

Community Education and Outreach Consultant

August 6, 2014

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PURPOSE OF THE REQUEST FOR PROPOSAL

CTPF is requesting proposals from interested public relations firms to provide communications and public relations services that will:

- Highlight our core messages to help educate external audiences via print, broadcast, social, and electronic media.
- Provide media training, guidance, and support for selected senior staff and trustees
- Produce clear measures of success.

CTPF has a 2 person marketing/communications staff and a freelance writer/editor to assist staff. The firm selected should anticipate working closely with identified CTPF personnel to implement a comprehensive integrated communications strategy.

This RFP is soliciting bids from all interested parties for a **two-year** contract, with the potential for an additional one-year extension.

BACKGROUND

Established by the Illinois state legislature in 1895 as The Public School Teachers' Pension and Retirement Fund of Chicago, CTPF administers a multi-employer defined benefit public employee retirement system. The fund offers retirement, survivor, and disability benefits for certain certified teachers and employees of the Chicago Public and charter schools, and certain other employees. CTPF is administered in accordance with Illinois Compiled Statutes (ILCS) Chapter 40, Articles 1, 17, 20.

CTPF's role is to prudently manage the assets supporting the pension plan and administer the entitlements and benefits provided by the plan. CTPF is governed by a Board of Trustees made up of 12 members, who include 6 contributing teachers, 3 pensioners, 1 contributing administrator, and 2 appointees of the Chicago Board of Education. The Board of Trustees oversees the fund's benefit programs, approves all benefits, makes investment decisions for the fund's assets, and provides general oversight to CTPF operations.

The fund serves approximately 63,000 active and retired educators, and provides pension and health insurance benefits to more than 27,000 beneficiaries.

I. POINT-OF-CONTACT

Any questions concerning specifications or requirements must be directed to:

Name	Frances Radencic, Director of Communications, Chicago Teachers'
Address	203 North LaSalle Street, suite 2600
Phone	312-604-1234
FAX	312.332.3346
E-mail	radencicf@ctpf.org

Questions are to be submitted to Frances Radencic via e-mail no later than 5:00 PM on August 22, 2014, using the Point-of-Contact information. All questions must include the name of the company, representative or individual submitting the question(s). A compilation of all questions and answers, along with any RFP addenda, will be posted to www.ctpf.org under RFPs. CTPF is not responsible for questions received after the deadline.

II. SERVICES TO BE PROVIDED

See Exhibit A – Statement of Work.

III. SCHEDULE OF EVENTS

Event	Date
1. RFP posted to ctpf.org website	August 6, 2014
2. Written questions from Bidders about scope or approach due	August 22, 5:00 p.m.
3. Compilation of questions and answers, and any RFP addenda posted to www.ctpf.org	August 29, 2014
4. Proposal Due Date	September 1, 5:00 p.m.
5. Review of Proposals	September 2-5, 2014
6. Presentations by selected Bidders, if required	September 9-12, 2014
7. Anticipated date of approval by full Board	September 19, 2014
8. Anticipated commencement date of contract	October 1, 2014

- Any proposal received at the designated location after the required time and date specified for receipt shall be considered late and non-responsive. Any late proposals will not be evaluated for award.
- Proposals submitted shall be valid for 120 days following the closing date noted above. CTPF and the Bidder may extend this period by mutual written agreement. If a solicitation is cancelled before the due date, the offer will be returned unopened to the Bidder who submitted the response.
- Except for communications expressly permitted by this RFP, communications by Bidders with CTPF or the Board regarding the RFP are strictly prohibited from the date of this RFP through the date CTPF completes or terminates the RFP process, as publicly disclosed by CTPF. Bidders violating the communications prohibition may be disqualified, at CTPF's option.
- The quiet period does not prevent due diligence, or communications with an existing service provider that happens to be a candidate in the ordinary course of

services provided by such service provider; however, discussions related to the pending selection shall be avoided during those activities.

IV. GUIDELINES FOR PROPOSAL PREPARATION

Award of the contract resulting from this RFP will be based upon the most responsive Bidder whose offer will be the most advantageous to CTPF in terms of cost, functionality, and other factors as specified elsewhere in this RFP.

CTPF reserves the right to:

- Reject any or all offers and discontinue this RFP process without obligation or liability to any potential vendor
- Accept other than the lowest priced offer
- Award a contract on the basis of initial offers received, without discussions or requests for best and final offers

Bidder Minimum Qualifications

In order to be selected for this assignment, the Bidder must demonstrate that it can meet the requirements of the RFP and the scope of work contained in the RFP.

Proposal Submission Guidelines

In order to be considered for selection, proposals must be received via e-mail in .PDF format to Ms. Frances Radencic radencicf@ctpf.org no later than 5:00 p.m., on September 1, 2014. Paper submissions will be rejected as non-conforming. An e-mail communication will confirm receipt of the proposal.

Withdrawal

The Bidder may withdraw its proposal at any time prior to the deadline for submission upon presentation of a written request to CTPF.

Costs

CTPF will not pay for any information herein requested, nor is it liable for any costs incurred by the Bidder.

Oral Presentations

All bidders may be required to make one oral, in-person, presentation to the RFP Evaluation Committee. CTPF may, at its discretion, elect to have Bidder(s) provide additional oral presentations of their proposal. CTPF will contact those Bidders to schedule such a presentation. CTPF will not be responsible for any costs associated with any presentations related to this RFP process. Some bidders may not be asked to present to the committee.

Waiver of Claims

By submitting a proposal, the Bidder agrees to waive any claim it has or may have against CTPF, CTPF Board and/or CTPF officers, employees and agents, arising out of or in connection with the administration, evaluation, or recommendation of any proposal,

the waiver of any requirements under the RFP, the acceptance or rejection of any proposal, and/or the award of the Contract.

Notice to Bidders Regarding the State of Illinois Freedom of Information Act

The information submitted in response to this RFP will be subject to public disclosure pursuant to the State of Illinois Freedom of Information Act. The Act provides generally that all records relating to a public agency's business are open to public inspection and copying, unless specifically exempted under one of several exemptions set forth in the Act. In addition, if CTPF staff chooses to recommend any Bidder(s) to the Board or any of the Boards' Committees for hiring, such recommendation and the relevant proposal(s) will appear on a publicly posted agenda for public meetings of the Board and any Board Committee.

If a Bidder believes that any portion of its proposal is exempt from public disclosure under the Act, such portion must be marked "CONFIDENTIAL," "TRADE SECRET," or "PROPRIETARY," and made easily separable from the balance of the response. Proposals marked "CONFIDENTIAL," "TRADE SECRET," or "PROPRIETARY" in their entirety will not be honored, and CTPF will not deny public disclosure of all or any portion of proposals so marked. By submitting a proposal with portions marked "CONFIDENTIAL," "TRADE SECRET," or "PROPRIETARY," Bidder represents it has a good faith belief that such material is exempt from disclosure under the Act; however, such designations will not necessarily be conclusive, and the Bidder may be required to justify in writing why such material should not, upon request, be disclosed by CTPF under the Act. CTPF will use reasonable means to ensure that material marked "CONFIDENTIAL," "TRADE SECRET," or "PROPRIETARY" is safeguarded and held in confidence. CTPF will not be liable, however, for inadvertent disclosure of such material.

If CTPF denies public disclosure of any materials designated as "CONFIDENTIAL," "TRADE SECRET," or "PROPRIETARY", Bidder agrees to reimburse CTPF for, and to indemnify, defend and hold harmless CTPF, its officers, fiduciaries, employees and agents from and against: (a) any and all claims, damages, losses, liabilities, suits, judgments, fines, penalties, costs and expenses including, without limitation, attorneys' fees, expenses and court costs of any nature whatsoever (collectively, "Claims") arising from or relating to CTPF's non-disclosure of any such designated portions of a proposal; and (b) any and all Claims arising from or relating to CTPF's public disclosure of any such designated portions of a proposal if disclosure is deemed required by law or if disclosure is ordered by a court of competent jurisdiction.

In addition, if CTPF staff recommends any Bidder(s) to the Board for hiring, such recommendation and the relevant proposal(s) will appear on a publicly posted agenda for public meetings of the CTPF and Board.

V. DETAILED RESPONSE REQUIREMENTS

Transmittal Letter

The Bidder shall provide a transmittal letter identifying the responding company,

including its address, signed by an individual authorized to bind the company contractually. The letter shall state the name, title, address, phone number, fax number, and e-mail address of a contact authorized to provide clarifying information regarding the proposal.

Questionnaire and Written Responses

Bidder shall provide written responses to the following questions, reproducing the questions with each answer.

1. Provide a resume or brief overview description of the Bidder including biographical information, qualifications, experience, professional certifications, professional memberships, and office location.
2. Briefly describe your approach to providing all deliverables as described in the attached Statement of Work.
3. Describe specific expertise or knowledge in any of the following areas: pension funds, defined-benefit plans, retiree health insurance, and legislative issues/
4. Provide number of years the Bidder has been providing the services requested in this RFP.

Fee Proposal

Once a consultant has been selected, negotiations of the fee(s) may become necessary. In no case will the negotiations result in a fee that is higher than the fee contained in the proposal.

A fee schedule should be quoted as an annual fee with a range or estimate of the number of hours for the scope of work outlined in Exhibit A. Include your billing procedures.

Exceptions

Any exceptions to the specifications, terms and conditions of the RFP shall be explicitly set forth in this section of the proposal. If there are no exceptions, the Bidder shall explicitly state that it takes no exception to the RFP's specifications, terms and conditions. Any exception may result in this solicitation not being awarded to the Bidder.

Conflicts of Interest

Bidder must describe any known or perceived conflicts of interest which may result if its organization were engaged to perform the services herein requested.

Contract Negotiations

Once the Bidder has been selected to perform the services, negotiations will be initiated. CTPF expects engagement negotiations to be brief. If the agreement cannot be negotiated quickly with the selected Bidder, CTPF may, in its sole discretion, terminate negotiations with the previously selected Bidder and commence engagement with another party, whether or not that party was a Bidder.

Incomplete Proposals

If the information provided in a Bidder's proposal is deemed to be insufficient for evaluation, CTPF reserves the right to request additional information or to reject the proposal outright. False, incomplete, or unresponsive statements in connection with a proposal may be sufficient cause for its rejection. The evaluation and determination of the fulfillment of the requirements will be determined by CTPF and such judgment shall be final.

Reimbursement for Proposal Preparation

There is not expressed or implied obligation for CTPF to reimburse responding company for any expenses incurred in preparing proposals in response to this request. CTPF reserves the right to retain all proposals submitted and to use any ideas in a proposal regardless of whether that proposal is selected.

VI. EVALUATION CRITERIA

The following guidelines will be used to analyze and evaluate all proposals received. CTPF reserves the right to evaluate all factors deemed appropriate, whether or not such factors have been stated in this section.

A. Review of Proposals

An Evaluation Committee (Committee) consisting of CTPF staff will evaluate all proposals received.

1. The Committee will determine if Bidders meet the Mandatory Requirements listed below.
 - a. The Bidder has no conflict of interest with regard to any other work performed by the Bidder.
 - b. The Bidder is qualified to complete the services required.
 - c. The Bidder adheres to the instructions in this RFP.
2. The Committee members will individually evaluate and score each proposal based on:
 - a. Qualifications to perform the services requested
 - b. Proposed approach to meet the requirements of the Statement of Work.
 - c. Cost

B. Selection of Winning Bid

Selected Bidder will be notified and contract negotiations commence. After evaluation of the proposals and approval by CTPF, all bidders will be notified of the result.

General Proposal Conditions

Written approval from CTPF will be required for any news releases regarding the award of contract.

Changes in quantity, specifications, scope of work, delivery schedules, performance time, starting dates, and corrections to this RFP will be made by amendment. Amendments will be sent before the due date to all Bidders. All information provided to a Bidder will be given in written or e-mail communication.

CTPF will determine whether the closing date should be changed when amending the RFP. If the time available before closing is determined to be insufficient, prospective Bidders will be notified by telephone or electronically, followed by a written amendment. CTPF will not award a contract unless amendments made to the RFP have been issued in sufficient time to be considered by all prospective Bidders. Receipt of amendments shall be acknowledged in writing by all prospective Bidders.

This RFP is not an offer of a contract. Acceptance of a proposal does not commit CTPF to award a contract to any Bidder, even if the Bidder satisfied all requirements stated in this RFP. Publication of this RFP does not limit CTPF's right to negotiate for the services described in this RFP. CTPF reserves the right to choose to not enter into an agreement with any of the respondents to this request for proposal.

The information Bidder submits in response to this RFP becomes the exclusive property of CTPF.

VII. RESERVATIONS BY CTPF

CTPF reserves the right to cancel or modify this RFP at any time and to reject any or all proposals submitted.

CTPF will not be liable for any costs Bidder incurs in connection with the preparation or submission of any proposal.

If Bidder submits a proposal, CTPF reserves the right to make such investigations as it deems necessary to determine Bidder's satisfaction of the minimum qualifications and ability to furnish the required services, and Bidder agrees to furnish all such information for this purpose as CTPF may request.

CTPF also reserves the right to reject the proposal of anyone who is not currently in a position to perform the contract, or who has previously failed to perform similar contracts properly, or in a timely manner.

CTPF reserves the right to reject, in whole or in part, any and all proposals received; to waive minor irregularities; to negotiate in any manner necessary to best serve the public interest, and to make a whole award, multiple awards, a partial award, or no award.

CTPF reserves the right to award a contract, if at all, to the company which will provide the best match to the requirements of the RFP and the consulting services needs of CTPF, which may not be the proposal offering the lowest fees. CTPF may take into consideration any factor it considers relevant, such as past experience, the ability to perform the requirements stated in the RFP and in Exhibit A, and other relevant criteria. CTPF is not required to accept for consideration any proposals that fail to address or do not comply with each of the requirements or the criteria set forth in this RFP.

CTPF reserves the right to enter into discussions and negotiations with one or more organizations selected at its discretion to determine the best and final terms. CTPF is not under obligation to hold these discussions or negotiations with each organization that submits a proposal.

CTPF reserves the right to request additional documentation or information from respondents. Requested information may vary by respondent. CTPF may ask questions of any respondent to seek clarification of a proposal or to ensure the respondent understands the scope of the work or other terms of the RFP.

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EXHIBIT A

STATEMENT OF WORK

COMMUNITY EDUCATION AND ENGAGEMENT

The following provides a general overview of the specific work CTPF expects the selected firm to complete. This should not be considered an exhaustive listing of tactics to be employed to meet the goal stated above. CTPF welcomes proposer's recommendations to add strategies and tactics to this list that can further enhance our ability to create awareness of the fund and the issues that impact it.

The consultant or firm will:

- Propose and implement a regional media-relations strategy that elevates the exposure of CTPF to identified audiences via nation, regional, and local news and media organizations.
- Proactively identify opportunities for local, regional, and national media coverage and work to facilitate that coverage.
- Schedule media interviews for identified CTPF spokespeople and provide material support for interviews (attend interview, provide reference materials, documents with preparation information, etc.)
- Research and investigate opportunities for speaking engagements and other community education options for CTPF staff.
- Draft monthly news releases and generate placement of the same with regional news and media organizations.
- Track and respond to stories in the media that might benefit from a CTPF response.
- Monitor and report on the effectiveness of CTPF's press releases, story pitches and activities. Provide monthly activity reports.
- Generate measurable increases in media coverage of CTPF.