

METROPOLITAN WASHINGTON COUNCIL OF GOVERNMENTS



REQUEST FOR PROPOSALS RFP No. 15-007

October 3, 2014

CLEAN AIR PARTNERS STRATEGIC MARKETING, MEDIA, AND SPONSORSHIP SERVICES

I. INTRODUCTION

The Metropolitan Washington Council of Governments (COG) is the regional organization of 22 of the Washington area's major local governments and their governing officials, plus area members of the Maryland and Virginia legislatures and the U.S. Senate and House of Representatives. COG provides a focus for action on issues of regional concern such as comprehensive transportation planning, air and water quality management plans, environmental monitoring, tracking economic development and population growth and their implications on the region, coordinating public safety programs, and promoting adequate child care and housing for the region. COG is supported by financial contributions from its participating local governments, federal and state government grants and contracts and through donations from foundations and the private sector. More information on COG may be found at www.mwcog.org.

II. PROJECT

Clean Air Partners is a nonprofit organization that seeks to improve the health and quality of life of residents in the Baltimore-Washington region by encouraging individuals and organizations to take voluntary actions to reduce air pollution. Clean Air Partners began informally in 1994 and was subsequently chartered as a semi-independent formal organization by the Metropolitan Washington Council of Governments (COG) and the Baltimore Metropolitan Council (BMC) in 1997. The organization serves the metropolitan Washington-Baltimore region.

For more than 17 years, Clean Air Partners has strived to improve public health and the environment by working with businesses, organizations and individuals throughout the region to raise awareness and reduce air pollution through voluntary actions. Through the AirAlerts system, Clean Air Partners provides real-time air quality information to nearly 5,000 individuals and organizations throughout the region. Educating children is also an important part of the Clean Air Partners program. We distribute the "On the Air" air quality curriculum to regional schools as education tools for children to learn about the effect air quality has on the planet as well as their overall health. To date, the "On the

Air” program has reached over 13,000 students. More information on Clean Air Partners can be found at www.cleanairpartners.net.

III. SCOPE OF SERVICES/SCOPE OF WORK (SOW)

To support Clean Air Partners, COG is seeking the services of an expert marketing and communication firm. The objective of this RFP is to solicit innovative proposals from qualified vendors to implement the Clean Air Partners’ marketing and public relations and sponsorship program in the metropolitan Baltimore-Washington region. The goal of Clean Air Partners is to encourage businesses and individuals to take voluntary actions to improve the region’s air quality, such as teleworking, taking transit, carpooling, and using electric lawn and garden equipment. The marketing campaign associated with the program will be multidimensional, using a variety of methods to reach targeted audiences.

The contractor must provide all the benefits of a recognized full-service marketing/advertising/public relations agency to develop and implement a comprehensive multi-year marketing plan for 2015 - 2017. The comprehensive plan shall use existing resources such as community surveys, episodic surveys, and research performed for Clean Air Partners. The plan shall identify target audiences, draw on existing research, define marketing objectives, recommend marketing strategies and appropriate outreach vehicles, and make recommendations of detailed action plans to achieve the stated objectives. The contractor is encouraged to recommend innovative marketing techniques in the plan.

The contractor will utilize current as well as develop new promotional materials, which may include spots for radio, online and transit, and recommend, negotiate, and place advertising in various media outlets. The contractor shall oversee the media campaign, placement of media spots and review invoices to verify the spots have been run correctly and shall send the invoices to COG for payment. The contractor will provide media clips of interviews and media coverage of Clean Air Partners that occur during the year and prepare a comprehensive media campaign recap for Clean Air Partners and its sponsors. The contractor shall provide public relations assistance for the Baltimore-Washington region throughout the year that will position Clean Air Partners as the local air quality expert.

The contractor will identify and secure funding that supports the mission of Clean Air Partners. The contractor will reach out and meet with prospective organizations to cultivate partnerships and sponsorships in the metropolitan Washington-Baltimore region. The contractor must have demonstrated success in raising funds from diverse sources, including local and national corporations, foundations, government agencies, grants, and public donations through fundraising campaigns.

The contractor will report to the Clean Air Partners Managing Director and the Board of Directors. The Managing Director will coordinate the contractor’s plans and actions with the Marketing Committee, Finance Committee, and Board of Directors.

The contractor shall perform the following tasks and produce the following work products:

- Task 1** Project Management: Attend in-person Marketing Committee and Board of Directors meetings as requested by the Managing Director. The Managing Director may also require specific contractor personnel to attend meetings. Estimated number of in-person meetings is 4 per year. Attend monthly conference calls with the Managing Director. Develop a comprehensive multi-year strategic marketing plan.
- Task 2** Materials and Web Support: Prepare and revise as needed educational and promotional materials. Provide graphics, photos, and content for the website.
- Task 3** Social Media: Support the social media program by providing dynamic content to engage residents and organizations to join the conversations surrounding the region's air quality. Develop and implement various strategies-such contests, polls and advertisements.
- Task 4** Media Campaign: Produce, negotiate, and place radio, online, transit, and/or TV spots. Provide media clips and recap binders to Clean Air Partners and its sponsors.
- Task 5** Business and Community Outreach: In close cooperation with the Managing Director, provide tools to support sponsor recruitment and renewals, such as sponsor packages. Provide coordination and secure in-kind partnerships with local transit organizations.
- Task 6** Public Relations: Provide public relations assistance for Clean Air Partners in the Baltimore-Washington region.
- Task 7** Education Program: Provide marketing support and develop materials for the "On the Air" education program.
- Task 8** Sponsorship Recruitment and Fundraising: Secure funds through new program sponsors, grants, and fundraising events. Develop customized sponsorship packages, prepare grant proposals, and implement fundraising campaigns. Identify funding opportunities and present to the Board for approval. Coordinate sponsorship activities with the Managing Director and Board and attend meetings as requested.

IV. DEFINITIONS

- a. Contracting Officer - The Executive Director of the Metropolitan Washington Council of Governments.
- b. Contractor – An individual or organization awarded the prime contract based on this solicitation.

- c. Subcontractor - An individual or business firm contracting to perform part or all of a Contractor's contract.
- d. Selection Committee - The Committee established to review proposals received in response to this solicitation and which recommends selection of contractors to the COG Contracting Officer.

V. PERIOD OF PERFORMANCE

The Period of Performance shall commence as of the date of a fully executed contract and continue through December 31, 2015. At COG'S discretion, the period of performance may be extended without re-competition for up to two 1-year periods.

VI. TYPE OF CONTRACT

COG anticipates awarding a time and materials contract in an amount not to exceed \$180,000, which will be allocated as follows:

Marketing and Media Services (Tasks 1-7): \$130,000

Sponsorship Recruitment and Fundraising (Task 8): \$50,000

The contractor will be required to track expenses for Marketing and Media Services and Sponsorship Recruitment and Fundraising separately. The contract amount does not include the cost of sponsor paid advertising or events.

VII. SPECIAL CONDITIONS

The following conditions apply to the Contractor selected:

- i) Federal, State, or foreign taxes are not allowable.
- ii) Legal fees of any type are not allowable without prior written approval of COG Contracting Officer.
- iii) In the event the project is terminated by administrative action, the Contractor will be paid for work actually performed prior to the date of termination.
- iv) Any work to be subcontracted to a "Subcontractor" shall be clearly identified and such "Subcontractor" shall be approved by COG prior to contract issuance pursuant to this RFP.
- v) The Contractor, acting as an independent contractor, shall hold COG harmless from and shall be solely responsible, where found liable, for the payment of any and all claims for loss, personal injury, death, property damage, or otherwise,

arising out of any act of omission or negligence of its employees or agents in connection with the performance of this work.

- vi) In case of failure by the Contractor and/or Subcontractor to perform the duties and obligations imposed by the resulting contract, COG may, upon verbal notice, to be confirmed in writing, procure the necessary services from other sources and hold the Contractor and/or Subcontractor responsible for any and all additional costs occasioned thereby.
- vii) The Contractor covenants that it presently has no interest, shall not acquire any interest, direct or indirect, which would conflict in any manner or degree with the performance of services required to be performed under this contract. The Contractor further covenants that in the performance of this contract, no person having any such interest shall be employed.
- viii) It is understood that funding for performance of work and services under any contract awarded as a result of this procurement shall be and remain contingent upon COG receiving funds from DC Water to support payment for such performance. Should funding from the source of funding for a particular task be delayed, for any reason, COG shall be entitled to withhold payment to a contractor for the corresponding delay in COG's receipt of grant funding.
- ix) Payment will be made to the Contractor 60 days following the receipt of a correct invoice from the Contractor and approval of the COG Project Manager. Contractor shall submit monthly invoices that will include all work to include that of subcontractors and its final invoice within 30 days after expiration of the contract.
- x) The terms and conditions set forth within Attachment A, Standard Terms and Conditions.
- xi) The Contractor must procure, at its sole cost and expense, and maintain in force at all times during the term of any resultant contract, the following insurance:
Commercial General Liability Insurance with limits of at least \$1,000,000 per occurrence and \$2,000,000 annual aggregate.

The Contractor shall maintain insurance meeting the above requirements with an insurance company that has an A.M. Best rating of "A-" or better (<http://www.ambest.com/ratings/guide.asp>), and be of Financial Size Class "XII" or larger (over \$1 billion in policyholder surplus).

The Contractor shall provide to COG a Certificate of Insurance as proof of such insurance prior to the execution of the contract. COG shall be listed as an additional insured.

If the Contractor fails to provide adequate proof of insurance as described above, the award of any contract shall be at COG's sole discretion.

VIII. INSTRUCTIONS, CONDITIONS AND NOTICES TO OFFERORS

COG is the procuring entity, and this procurement transaction will, in all aspects, and as required by the applicable grant conditions, be governed by COG's own Procurement Policy and procedures. A copy of COG's Procurement Policy is available to any potential offeror, by request. COG intends to award one or more contracts resulting from this solicitation to qualified, responsible Offeror(s) whose proposals conform to the requirements of this RFP and whose proposals are most advantageous to COG.

COG may award a contract on the basis of initial offers received, without discussion. Therefore, each initial offer should contain the Offeror's best terms from a price and technical standpoint. COG may communicate with Offerors in order to clarify, verify or obtain additional information about the Offeror's past performance or experience; however, if discussions are conducted with any offeror, COG will follow the process set forth within its procurement policy relative to the conduct of competitive negotiations. Each Offeror shall include a Statement of Capabilities in the above-mentioned areas demonstrating the Offeror's knowledge of the NCR.

IX. LATE PROPOSALS

Any proposal received at the office designated in this RFP after the exact time specified for receipt, will not be considered, and will be returned, unopened, to the sender, unless it is the only proposal received. Any modifications to a proposal will be subject to these same conditions. Proposals may be withdrawn by written or telegraphic notice received at any time prior to award.

Questions

Technical questions regarding the RFP must be submitted in writing to the COG Project Manager (Jennifer Desimone jdesimone@mwkog.org). Procedural or administrative questions must be submitted in writing to the COG Contracts and Purchasing (Jalene Duressa, jduressa@mwkog.org). Questions must be submitted by **Monday October 20, 2014 3pm.**

X. SUBMISSION DATE AND CONTACT

Proposals shall be submitted by no later than 2:00 p.m. on October 30, 2014. Please place the RFP number on the outside of your submission.

Offerors shall submit one (1) original and four (4) copies of their proposal one (1) CD or USB drive and DBE Certificate with the complete proposal to:

Jalene Duressa
Contracts and Purchasing
Metropolitan Washington Council of Governments,
777 North Capitol Street, NE, Suite 300
Washington, DC 20002

XI. PROPOSAL FORMAT AND CONTENT

Offerors must follow the prescribed format or they shall be deemed nonresponsive. Adherence to the proposal format by all Offerors will ensure a fair evaluation and one which can evaluate each response with regard to the needs of COG. The letter transmitting the proposal must be signed by an officer authorized to bind the Offeror as required by this RFP. Separate sections shall be prepared as described in the following:

Section 1: Project Approach

Respondents shall describe in no more than eight (8) pages their understanding of the project and their approach for the completion of all of the tasks described herein.

Proposals should address personnel assignment and labor to meet the approximate level of effort.

Section 2: Qualifications of the Firm and Personnel

This section shall provide the professional credentials and expertise of the firm(s) and key personnel assigned to this project. Relevant experience should be described. Resumes should be included.

Respondents shall provide an affirmative statement that the key personnel provided for this project shall be available for duration of the project. Local in-person availability and/or travel requirements of personnel should also be discussed in this section.

Completed copies of Attachments B and C to this RFP.

Section 3: Cost Proposals for the Contractor and Any Subcontractor(s)

This section shall provide the hourly costs, including all expenses, profits and fees, and any travel costs that may be incurred to be charged to COG for providing the services described above. The staff proposed and their costs should be compared to the anticipated work requirements as described in Section III to develop an annual total cost for the project.

Section 4: References

The Offeror and any Subcontractor or "Other Subcontractor" shall provide at least three (3) references that COG may contact regarding similar work performed. Respondents may

provide letters of reference from previous relevant clients. Names, titles, addresses, telephone numbers, and emails shall be included for each reference.

All three of these references shall include work in which the key personnel proposed to COG have been assigned. The relevant work, roles and responsibilities should be briefly described for each key person.

XII. PROPOSAL DOCUMENT ORGANIZATION

Offerors shall submit a cover letter, addressed to: Jalene Duressa, COG Contracts and Purchasing, (address above) signed by an authorized principal or agent of the Offeror, which provides an overview of the proposal, as well as, the name, title and phone number of the person to whom questions may be directed to concerning the proposal. The letter should also include a statement by the Offeror accepting all terms and conditions contained in this RFP. The written proposal shall be organized to match the headings delineated below:

- A. Letter of Interest
- B. Table of Contents
- C. Executive Summary
- D. Project Approach
- E. Qualifications of the Firm and Personnel
- F. Cost Proposal
- G. References

XIII. METHOD OF PROPOSAL EVALUATION AND SELECTION

The proposals will be evaluated and ranked by a Selection Committee based on the evaluation factors in the chart following this section. The selection committee may hold, at COG's option a pre-selection meeting with the top-ranked respondents. The final recommendation for selection to the COG Contracting Officer may be made based upon interviews and/or a best and final offer submitted by the Offerors, if recommended by the Selection Committee. In evaluating the proposals, the following factors will be considered, with points awarded up to the maximum shown:

Factors	Points
Demonstrated direct relevant experience of the contractor, its key personnel, and any subcontractors.	35
Knowledge of air quality and climate issues	20
Familiarity of the Baltimore and Washington media markets	15
Cost & Price	15
DBE Participation	15
Total Points	100

XIV. EQUAL EMPLOYMENT OPPORTUNITY

The terms and conditions set forth within Exhibits A and B, attached to this RFP, are incorporated by reference as if set forth herein verbatim. In submitting a proposal in response to this RFP, and in performing services under any contract resulting from this RFP, the successful contractor shall be bound to comply with all of the terms, conditions and requirements referenced within Exhibits A and B.

In connection with the execution of this CONTRACT, the CONTRACTOR shall not discriminate against any employee or applicant for employment because of race, religion, color, sex, age or national origin. The CONTRACTOR shall take affirmative action to insure that applicants are employed, and that employees are treated during their employment, without regard to their race, religion, color, sex, age or national origin. Such actions shall include but not be limited to, the following: employment, upgrading, demotion or transfer; recruitment or recruitment advertising; layoff; or termination, rates of pay, or other forms of compensation; and selection of training, including apprenticeship.

No qualified disabled applicant for employment, or employee, shall, on the basis of disability be subjected by the CONTRACTOR to discrimination in employment under any program or activity that receives or benefits from financial assistance under this CONTRACT.

CONTRACTOR shall make reasonable accommodation to the known disabilities of an otherwise qualified applicant for employment, or current employee, unless the CONTRACTOR can demonstrate to COG that the accommodation would impose an undue hardship on the operation of the PROJECT. Reasonable accommodation shall be as defined in Title 49, Code of Federal Regulations, Part 27.33.

XV. DISADVANTAGED BUSINESS ENTERPRISE

The Disadvantaged Business Enterprise (DBE) participation shall be an integral component of the consultant selection procedure for this RFP. COG has established a DBE goal of 19% for this

project. COG's DBE Policy may be viewed on its website www.mwcog.org. Offerors shall submit with their proposals a DBE Participation Plan to meet this goal. The plan shall identify any DBE (defined in 49 CFR Part 26) that shall be participating in the project. The plan shall include the name and address of the firm, a copy of the firm's current DBE Certification from any federal, state or local government agency that certifies DBE ownership (**please note only DBE certifications will be accepted by COG for this purpose**).

A total of 15 possible points (out of a maximum of 100 points) may be awarded for DBE participation, as measured in dollars, either as the Contractor or "Subcontractor". In the event of a tie score between two or more proposals, the proposal with the largest percentage of DBE participation, as measured in dollars, will be awarded the contract. DBE points are to be awarded as follows:

<u>PARTICIPATION</u>	<u>POINTS</u>
10% to 14%	3
15% to 19%	6
20% to 24%	9
25% to 34%	12
35% or more	15

SAMPLE DBE PARTCIPATION PLAN

DBE SUBCONTRACTOR		PERCENTAGE OF CONTRACT
Subcontractor:		
Address:		
Certifying State:	DBE Certification #	
Subcontractor:		
Address:		
Certifying State:	DBE Certification #	
Subcontractor:		
Address:		
Certifying State:	DBE Certification #	

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