

**REQUEST FOR PROPOSAL**  
***Integrated Marketing Agency for Utah Governor's Office of Economic Development***  
**Solicitation # YL15007**

## **PART 1: OVERVIEW AND INSTRUCTIONS**

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### **PURPOSE OF REQUEST FOR PROPOSAL (RFP)**

The purpose of this request for proposal is to enter into a contract with a qualified Integrated Marketing and Public Relations firm to work as a collaborative partner in the development, implementation, and evaluation of a comprehensive public relations and marketing campaign to promote the State of Utah as a business destination to business markets inside and outside the state. The budget is anticipated to be \$250,000 for the first year of the contract. Budget for additional years will be based on requirements and funding available. Budget may be increased if additional funding becomes available during the term of the contract or decrease if a budget reduction is necessary.

It is anticipated that this RFP may result in an award to a single contractor. However, the State reserves the right to award scope of work sections to various agencies through multiple awards if determined to be in the best interest of the State.

This RFP, having been determined to be the appropriate procurement method to provide the best value to the State, is designed to provide interested offerors with sufficient basic information to submit proposals meeting minimum requirements. It is not intended to limit a proposal's content or exclude any relevant or essential data. Offerors are at liberty and are encouraged to expand upon the specifications to evidence service capability under any agreement.

### **BACKGROUND**

GOED is a government agency. Utah's economic development plan includes this vision: *Utah will lead the nation as the best performing economy and be recognized as a premier global business destination.*

GOED's mission: *Utah will excel in job creation, innovation, entrepreneurship, global business, and quality workforce and have a stable and sustainable business friendly environment.*

The Governor's Office of Economic Development (GOED) is charged with diversifying Utah's economy and creating better paying jobs for its citizens by supporting, attracting and helping to create and expand businesses in innovative, high-growth industries. GOED also includes the Utah Office of Tourism, Utah Film Commission, Business Recruitment, and an International team. GOED works in collaboration with a statewide network of regional and local economic development organizations that provide specialized assistance in each of Utah's 29 counties and contracts for out of state business recruitment with the Economic Development Corporation of Utah.

GOED administers programs that are based around industries or specific "economic clusters" that demonstrate the best potential for development and these include Life Sciences, Software Development and Information Technology, Aviation and Aerospace, Defense and Homeland Security, Financial Systems, Energy and Natural Resources, and Outdoor Products and Recreation. GOED utilizes state resources and private sector contracts to fulfill its mission.

GOED seeks a professional firm as a collaborative partner to perform the function of developing and implementing a successful marketing, public relations and recruiting campaign under the direction of the GOED Business Marketing team. This function includes, but is not limited to, market research, data analysis, creation of advertisements, ad placement and buying, marketing, public relations, event planning and government relations. It does not extend to Tourism or Film Commission promotional efforts, though it is expected to support GOED's agency-wide global branding efforts.

For more information about the Governor's Office of Economic Development, visit our official government website at <http://business.utah.gov>.

Funds may be used for research, brand promotion and all activities that market the State's business services. GOED retains the rights to directly purchase media, promotions, advertising, and other marketing resources when in the best interest of the State.

### **ISSUING OFFICE AND RFP REFERENCE NUMBER**

The State of Utah Division of Purchasing is the Issuing Procurement Unit for this document and all subsequent addenda relating to it, on behalf of the Conducting Procurement Unit, Governor's Office of Economic Development (GOED). The reference number for the transaction is Solicitation # YL15007. This number must be referred to on all proposals, correspondence, and documentation relating to the RFP.

NOTICE: Wherever the term bid, bidder, bidding or quote appears in this solicitation or reference is made to a bid, bidder, bidding, or quote, it shall be interpreted to mean offeror, as defined in 63G-6a-103(30), RFP, or Request for Proposals, as defined in 63G-6a-103(38) and the procurement shall be conducted subject to the provisions of 63G-6a-701-711.

### **QUESTIONS**

All questions **MUST** be submitted through BIDSYNC ([www.bidsync.com](http://www.bidsync.com)). Questions submitted through any other channel will not be answered. Questions may be answered as they come in or may be compiled into one document and answered via an addendum. Only answers disseminated by the State through the BidSync system or through an authorized and properly issued addendum shall serve as the official and binding position of the State. Answers provided via BidSync will constitute an addendum to the solicitation.

### **ADDENDA**

Offerors are encouraged to periodically check BidSync for posted questions, answers and

addenda.

Any modification to this procurement will be made by addendum issued by the State Division of Purchasing. Only authorized and properly issued addenda shall constitute the official and binding position of the State.

Any response to this solicitation which has as its basis any communications or information received from sources other than this solicitation or related official addenda could be considered non-responsive and be rejected at the sole discretion of the State.

## **RESTRICTIONS ON COMMUNICATIONS**

From the issue date of this solicitation until a contractor is selected and the selection is announced, offerors are prohibited from communications regarding this procurement with agency staff, evaluation committee members, or other associated individuals EXCEPT the procurement officer overseeing this procurement. Failure to comply with this requirement may result in disqualification.

## **SUBMITTING YOUR PROPOSAL**

**NOTICE:** By submitting a proposal in response to this RFP, the offeror acknowledges and agrees that the requirements, scope of work, and the evaluation process outlined in the RFP are understood, fair, equitable, and are not unduly restrictive.

Notification to the State of any ambiguity, inconsistency, excessively restrictive requirements, and errors in the solicitation documents, solicitation questions, or exceptions to the scope/content of the RFP MUST be submitted as a question through BidSync during the solicitation process and prior to the closing date of time for questions. Any formal protest must be in compliance with Utah Code Annotated §63G-6a-1601 thru 1604.

**Proposals must be received by the posted due date and time.** Proposals received after the deadline will be late and ineligible for consideration.

**Electronic submission instructions:** When submitting a proposal electronically through BidSync, please allow sufficient time to complete the online forms and to upload your proposal documents. The solicitation will end at the closing time posted in BidSync. If you are in the middle of uploading your proposal when the deadline arrives, the system will stop the upload process and your proposal will **not be accepted** by BidSync, and your attempted submission will be considered as non-responsive.

Electronic proposals may require uploading of electronic attachments. BidSync's site will accept a wide variety of document types as attachments. However, the State of Utah is unable to view certain documents. Therefore, **DO NOT submit** documents that are embedded (zip files), movies, wmp, encrypted, and mp3 files. All documents must be uploaded in BidSync as separate files.

Hard copy submission instructions: The preferred method of submitting your proposal is electronically through BidSync. However, if you choose to submit your response in hard copy form, one (1) original and 6 identical copies of your Technical Proposal must be received prior to the Due Date and Time, at the following address:

State of Utah Division of Purchasing  
3150 State Office Building, Capitol Hill  
P.O. Box 141061  
Salt Lake City, Utah 84114-1061

Additionally, one (1) original Cost Proposal form (see **Attachment B- Cost Proposal Form**) must be submitted in a separately sealed envelope delivered at the same time as the Technical Proposal. The outside cover of the package containing the Technical Proposal shall be clearly marked "Solicitation #YL15007 – Technical Proposal and include the Due Date and Time" The outside cover of the Cost Proposal shall be clearly marked "Solicitation #YL15007 – Cost Proposal and include the Due Date and Time" Refer to the Request for Proposal – Instructions and General Provisions for further information on proposal submissions.

Please allow sufficient time for delivery of hardcopy responses. Responses sent overnight, but not received by the closing date and time will not be accepted.

Cost will be evaluated independently from the technical proposal, and as such MUST be submitted separate from the technical proposal. Failure to submit cost or pricing data separately may result in your proposal being judged as non-responsive

All costs incurred in the preparation and submission of a proposal is the responsibility of the Offeror and will not be reimbursed.

All costs related to the preparation of offeror responses and any related activities are the sole responsibility of the offeror. The State of Utah assumes no liability for any costs incurred by offerors throughout the evaluation and selection process.

The offeror must respond to this RFP by submitting all requested information and addressing all specifications as required herein, in order for the proposal to be evaluated and considered for award. Failure to submit such data or to address all specifications shall be deemed sufficient cause for disqualification of a proposal from further consideration for award. Proposals received in response to this RFP should address the entire project defined herein. No partial proposals will be considered for award. The offeror must certify in its proposal that it includes performance of the complete requirements of this request. Partial responses will not be accepted.

GOED is not liable for costs incurred by service providers prior to the issuance of any agreements, contracts, or purchase orders, and will not pay for information solicited or obtained. The information obtained will be utilized in determining suitability of services offered. Subsequent procurement, if any, will be in accordance with appropriate GOED contractual action.

## **LENGTH OF CONTRACT**

The Contract resulting from this solicitation will be for a period of five (5) years with no renewal options for additional years. Pursuant to Utah Code Annotated §63G-6a-1204 any contract resulting from this RFP may not exceed a period of five years.

The State of Utah reserves the right to review contract(s) on a regular basis regarding performance and cost analysis and may negotiate price and service elements during the term of the contract.

## **PRICE GUARANTEE PERIOD**

All pricing must be guaranteed for the entire period of the contract. Each year a new detailed budget will be required based on the amount appropriated by the legislature.

Any adjustment or amendment to the contract will not be effective unless approved by the State Director of Purchasing and GOED. The State will be given the immediate benefit of any decrease in the market, or allowable discount.

## **STANDARD CONTRACT TERMS AND CONDITIONS**

Any contract resulting from this RFP will include, but not be limited to the State's Standard Terms and Conditions (Attachment A). Attachment A will contain terms and conditions specific to this procurement.

NOTE: If Attachment A is not included, then the State's Standard Terms and Conditions are attached by reference. The State's Standard Terms and Conditions can be found at <http://purchasing.utah.gov/purchasingforms.html>.

Exceptions and or additions to the State's Standard Terms and Conditions are strongly discouraged. Exceptions and additions to the Standard Terms and Conditions must be submitted with the proposal response. Exceptions, additions, service level agreements, etc. submitted after the date and time for receipt of proposals will not be considered. Website URLs, or information on website URLs must not be requested in the RFP document and must not be submitted with a proposal. URLs provided with a proposal may result in that proposal being rejected as non-responsive. URLs are also prohibited from any language included in the final contract document.

The State retains the right to refuse to negotiate on exceptions should the exceptions be excessive, not in the best interest of the State, negotiations could result in excessive costs to the state, or could adversely impact existing time constraints.

In a multiple award, the State reserves the right to negotiate exceptions to terms and conditions based on the offeror with the least to the most exceptions taken. Contracts may become effective as negotiations are completed.

If negotiations are required, contractor must provide all documents in WORD format for redline editing. Contractor must provide the name, contact information, and access to the person(s)

that will be directly involved in legal negotiations.

Any mandatorily required acceptance of an offeror's terms and conditions may result in the proposal being determined to be non-responsive.

An award resulting from this RFP is subject to successful contract terms and conditions negotiation (if required). The State of Utah, at its sole discretion, will determine when contract terms and conditions negotiations become unproductive and will result in termination of award to the contractor.

## **PROTECTED INFORMATION**

The Government Records Access and Management Act (GRAMA), Utah Code Ann., Subsection 63G-2-305, provides in part that:

*the following records are protected if properly classified by a government entity:*

- (1) trade secrets as defined in Section 13-24-2 if the person submitting the trade secret has provided the governmental entity with the information specified in Section 63G-2-309 (Business Confidentiality Claims);*
  - (2) commercial information or non-individual financial information obtained from a person if:
    - (a) disclosure of the information could reasonably be expected to result in unfair competitive injury to the person submitting the information or would impair the ability of the governmental entity to obtain necessary information in the future;*
    - (b) the person submitting the information has a greater interest in prohibiting access than the public in obtaining access; and*
    - (c) the person submitting the information has provided the governmental entity with the information specified in Section 63G-2-309;**
- \* \* \* \* \*
- (6) records the disclosure of which would impair governmental procurement proceedings or give an unfair advantage to any person proposing to enter into a contract or agreement with a governmental entity, except that this Subsection (6) does not restrict the right of a person to see bids submitted to or by a governmental entity after bidding has closed; ....*

GRAMA provides that trade secrets, commercial information or non-individual financial information may be protected by submitting a Claim of Business Confidentiality.

To protect information under a Claim of Business Confidentiality, the offeror must:

1. Provide a written Claim of Business Confidentiality *at the time the information (proposal) is provided to the state*, and
2. Include a concise statement of reasons supporting the claim of business confidentiality (Subsection 63G-2-309(1)).
3. Submit an electronic "redacted" (excluding protected information) copy of your proposal response. Copy must clearly be marked "Redacted Version."

A Claim of Business Confidentiality may be appropriate for information such as client lists and non-public financial statements. **Pricing and service elements may not be protected.** The claim of business confidentiality must be submitted with your proposal on the form which may be accessed at:

<http://www.purchasing.utah.gov/contract/documents/confidentialityclaimform.doc>

**An entire proposal cannot be identified as “PROTECTED”, “CONFIDENTIAL” or “PROPRIETARY” and may be considered non-responsive if marked as such.**

To ensure the information is protected, you must identify all protected information in Section 3 of the proposal response and submit a redacted copy of the proposal response at the same time offeror submits its proposal response. The redacted copy of the offeror’s proposal response must be submitted in compliance with this section of this RFP.

All materials submitted become the property of the state of Utah. Materials may be evaluated by anyone designated by the state as part of the proposal evaluation committee. Materials submitted may be returned only at the State's option.

### **WORK FOR HIRE**

All work products of the selected contractor, including but not limited to electronic and physical files, developed in the performance of this contract, is work made for hire as a contribution to a collective work, and as such, is the property of GOED. Therefore, the offeror must assign full copyright/trademark ownership to GOED.

### **TRAVEL TIME AND EXPENSES**

Travel time/expenses/mileage, meals, car rental, and/or stipends expenses will not be reimbursed unless specifically noted.

Travel expenses for authorized trips will be reimbursed at then-current State of Utah per diem rates. The State will not pay for travel time.

Invoices for permissible non-per diem travel related expenses must include applicable receipts.

## **PART 2: SCOPE OF SERVICES AND REQUIREMENTS**

The Governor's Office of Economic Development seeks the most creative, cost effective, full-service, integrated marketing contractor to produce advertising and marketing materials that will make the case for Utah as a premier and preferred business destination domestically and globally. The selected contractor will perform the following as directed by GOED; some tasks may be kept as operational activities within GOED. The State reserves the right to award all scope to one agency, or to award scope of work sections to various agencies:

Please address each requirement, in a succinct manner, point by point, as follows:

### **1. MANDATORY MINIMUM REQUIREMENTS/QUALIFICATIONS**

- 1. Agency must have an office located within the State of Utah.**
- 2. Account Manager must reside in the State of Utah.**

### **2. DETAILED REQUIREMENTS:**

Please provide a concise response indicating agreement with GOED's requirements in sections 2.1 through 2.6. You need not respond in detail to the sub-sections (such as 2.1.1, 2.1.2 etc.) unless you wish to clarify or highlight your position on that specific point.

#### **2.1. GENERAL ACCOUNT LOGISTICS**

1. Use of in-state partners for branding, marketing, public relations, advertising and promotion is preferred. Use of experts outside of the state for the same activities is permitted.
2. Within the first sixty (60) days from the contract award date, the contractor shall establish and maintain throughout the contract period, an account manager office located in the state of Utah. Key members of the contractor's GOED account team must provide day-to-day operations from the contractor's Utah office unless otherwise approved in writing by GOED. All contractor costs for the Utah office related to GOED shall be included in the contractor's blended hourly rate.
3. Make trips outside Utah for the purpose of contacting publications, firms, companies, bureaus, organizations or groups or for the purpose of learning about the latest business marketing trends and research related to Economic Development. No outside trips shall be authorized by GOED that involve an unreasonable expenditure of money, as determined in GOED's sole discretion, on the part of the Contractor and no trips shall be required at times which are not mutually agreeable to GOED and Contractor.
4. Attend GOED and various industry meetings or retreats. Join and support industry

coalitions and public interest groups.

5. All original advertising material or specific rights to material created or negotiated for or on behalf of GOED such as copy, photography, illustration, artists' layouts or design sketches, and storyboards are the property of GOED once Contractor charges are fully paid.
6. Carry public liability and property damage insurance per the attached Terms & Conditions #22. Insurance.
7. Will provide estimates of all costs to GOED for approval before production is scheduled.
8. Will submit work orders to GOED for written approval in advance of all material projects including advertising placements.
9. Printing orders of \$1,000 or greater will require at least three written bids from qualified bidders. The State may choose to use pre-approved State Contractors or obtain bids if in the best interest of the State.
10. Will seek to obtain discounts for cash or other considerations on all subcontracted work. Earned discounts will be credited to GOED within thirty days. At least quarterly, GOED will be provided copies of all invoices for work done under the contract.
11. Will contribute agency and related organizational expertise in cooperation with other contractors in the ongoing development of GOED's marketing plan.
12. The contractor agrees and understands that GOED's agreement to the contract is predicated in part on the utilization of the specific personnel, personnel qualifications, and personnel resources identified in the contractor's proposal.
  - a. The contractor shall agree and understand that GOED shall have the right to approve or disapprove assignment of any of the contractor's personnel assigned to the account team. Furthermore, the contractor must obtain the written approval of GOED prior to replacement of any previously approved account team member. The contractor further agrees that any replacement made must be determined by GOED to be essentially equal or better than originally proposed in terms of overall qualifications.
    - 1) The contractor shall include GOED in the search process to review potential replacements.
    - 2) GOED's approval of a replacement shall not be construed as acceptance of the person's performance potential.
    - 3) GOED agrees that an approval of a replacement will not be unreasonably withheld.

- b. The contractor shall agree and understand that GOED shall have the right to request replacement of any person assigned to the account team for any reason. Unless the situation regarding the contractor's assigned personnel requires immediate replacement, the contractor shall be allowed at least fourteen (14) calendar days after notification to replace personnel.
- c. Personnel other than account team - Within the first fourteen (14) calendar days after a change, the contractor must notify GOED in writing of other changes in personnel that may affect the GOED account (other than account team personnel which must be approved as stated previously.) If required by GOED after such notification, the contractor shall provide the state agency with a copy of the resume for any new personnel who may serve as a resource on the state agency's account.

## **2.2 BRANDING**

1. In conjunction with GOED, continue to promote and extend the Utah Life Elevated® brand. This may include further development of brand strategy, brand positioning, brand communications, brand platforms and usage guidelines, logo design if deemed necessary by GOED, and all other pertinent tactics and requirements for promoting the Utah Life Elevated® brand.
2. Assist GOED in strategic long-term planning and research gathering. Contractor shall make recommendations as to the most effective method by which to obtain the objectives desired by GOED with the understanding that adoption of any proposed method, plan or suggestion be left to the exclusive judgment of GOED.
3. Will coordinate efforts with GOED's program specialists resulting in a seamless implementation of its strategic vision.
4. In conjunction with GOED, continue to promote Utah as a premier business destination both domestically and internationally. This may include further development of brand strategy, brand positioning, brand communications, brand platforms and usage guidelines, logo design if deemed necessary by GOED, and all other pertinent tactics.

## **2.3 MARKETING & ADVERTISING**

1. Perform creative advertising, marketing representation and assistance, literature productions, video productions, public relations, social media campaign development, and media purchase functions as required by GOED. Work can involve securing subcontractors to provide services related to special activities and publicity projects; and to perform typesetting and photo production of materials necessary for printing.
2. Recommend to GOED the best means and methods for obtaining maximum returns and results in the promotion and encouragement of economic development in the State of Utah.
3. Assist GOED by outlining plans and recommending media, determined by Contractor, to

be the most effective in obtaining the objectives desired by GOED, with the understanding that adoption of any proposed method, plan or suggestion be left to the exclusive judgment of GOED.

4. Negotiate and secure in-kind cooperative advertising for promotional projects specified by GOED.
5. Prepare and write advertising copy required by GOED and handle the illustration of such copy, both to be approved by GOED.
6. Design and produce advertising for magazines and newspapers; purchase print advertising space; design and produce commercials for radio and television; purchase radio and television time; design and produce collateral literature as assigned; and provide other account services as needed by GOED.

***NOTE: GOED maintains the right to use other independent contractors or produce their own material within their marketing office.***

7. When requested, assist GOED in the development and enhancement of technology-based strategies and programs; including the updating of websites, social media, photo libraries, rich media applications, Salesforce integration, data collection and reporting.
8. Provide creative direction and production for exhibit displays, media kits, sales materials, international marketing pieces, and other collateral materials as directed.
9. Use social media to specifically execute a marketing campaign to create greater awareness of Utah's premier business environment to specific targeted audiences. The contractor will create greater social media engagement and increase relevant followers by:
  - a. Developing strategic campaigns and themes
  - b. Creating targeted posts and outreach techniques including infographics and email marketing

***NOTE: The contractor will first receive approval from GOED before launching campaigns, or posting on social media.***

## **2.4 PUBLIC RELATIONS**

PR services that may be required from the Contractor may include:

1. Creation of a PR plan and timeline
2. Implementation of a press release program
3. Press Kit updates
4. Preparation and distribution of resource guides
5. Fielding and responding to media inquiries
6. PR training for GOED and its partners
7. Provide updates to editors/writers for brochures, handouts, infographics, flyers and

other related material.

8. Provide media contact lists
9. Augment GOED's library of Utah photos, DVDs, and video files
10. Implement a program of media outreach
11. Plan and assist with events and media tours
12. Report monthly on media outreach effectiveness

## **2.5 MEDIA BUYING**

1. Solicit, secure and monitor paid and non-paid media time and/or space in various domestic and international media, including but not limited to, broadcast, print, interactive/social, radio, out-of-home, and direct mail. The Contractor shall secure media placements and rates most advantageous to GOED. Any fees or commissions related to media buying will accrue to the Contractor with prior approval by GOED.
2. All media placements must be approved in advance by GOED. The contractor will not be reimbursed for any media purchases or placements made on behalf of GOED that have not been pre-approved by GOED.
3. The contractor will consult with GOED before media purchases are made.

## **2.6 ACCOUNTABILITY**

1. Furnish to GOED conference reports that detail results of each meeting between Contractor and GOED personnel. Reports shall include decisions made, next steps, assignments and timelines.
2. One time each calendar month, the Contractor shall submit a status/progress report outlining the following to GOED via email:
  - a) The specific accomplishments achieved during the monthly reporting period;
  - b) The specific activities and projects completed pursuant to the provision of the contract and the completion dates of such tasks;
  - c) The specific planned activities for the upcoming month;
  - d) The specific planned activities and projects and projected completion date(s) remaining to be completed pursuant to the provisions of the contract;
  - e) Any other pertinent information and accomplishments from the week.
3. Once a month the Contractor shall schedule time to discuss (via phone or in person) the monthly status/progress reports with GOED.
4. On a monthly basis, the Contractor shall submit a written spreadsheet report to GOED that details the status of the budget. The report shall include expenditures from the month, expenditures to date by project, and the remaining balance, as well as media planning status, media placed, media billed and media yet to be billed. The format of the report must be approved by GOED.

5. Upon request, provide independent research to evaluate market determinations and advertising effectiveness.
6. Assist GOED in preparing, reporting, and being accountable to various entities, including the Governor, State Legislature, and stakeholders on all marketing activities and results. This would include helping to produce quarterly and annual reports, publications, presentations and summaries.
7. Note that some GOED partners could request assistance from the Contractor. GOED is not to be billed for any contractor time spent assisting GOED partners if the request for assistance was not made by GOED.

### **3. DETAILED SCOPE OF WORK**

Describe in narrative format prior business-related and economic development campaigns you have implemented. Include the ad campaign strategies, creative concepts, budget, the actual ads, media buy placement with TV, online, radio, print, etc., as well as other promotions and initiatives to business and/or economic development. Proposal must also contain the following information:

#### **3.1 NARRATIVE**

1. A narrative of the offeror's unique capabilities to differentiate Utah as a place to do business and have a fulfilling career and quality of life.

#### **3.2 BRANDING**

1. Describe your experience developing or refreshing a business or economic development brand identity campaign. Explain citing clients and campaigns.
2. Explain how you have tracked your branding campaigns.

#### **3.3 MARKETING & ADVERTISING**

1. What is unique about your company's approach to business and economic development marketing and promotions?
2. Briefly explain how you have created campaigns that have effectively marketed some aspect of Utah's premier business environment.
3. What are other non-traditional social media or viral marketing tactics that you have used with success on other business and economic development campaigns?

#### **3.4 PUBLIC RELATIONS AND RESEARCH**

1. Briefly explain your experience and capability to perform public relations work, including preparation of press releases, organizations of events, outreach to key media contacts, etc. Specify if this is an in-house or sub-contracted capability.

2. List key clients relating to business development and other clients you have assisted with PR and describe key results you helped them achieve.
3. Please provide examples of successful collaboration with other PR providers in-state and out-of-state on joint projects.

### **3.5 ACCOUNTABILITY**

1. What are your standard practices for client communication and accountability?

### **3.6 CAMPAIGNS**

1. Provide two examples of past campaigns that you have produced that are relevant to this RFP. Explain why they are salient, and include creative from those campaigns.
2. For evaluation purposes, create a one page overview of how you would approach the following three campaigns. Do not include budget details as part of the overview. (Please note that firms invited to oral presentations will be asked to present a more detailed campaign related to the three examples).

Foreign Direct Investment - GOED has four in-country trade representatives based in Europe, Israel, China and Mexico. One of their tasks is identify and engage with potential investors who are interested in Utah business opportunities. For the purposes of the RFP, assume the target market is Mexico and the budget is up to \$50,000.

In-State Services – GOED has a number of in-state services that include Rural Development, Procurement Technical Assistance Centers, Business Resource Centers, technology grants and international business services. Develop a campaign to increase awareness of these services in the target market of Utah small businesses. For the purposes of the RFP, assume the budget is up to \$100,000.

Social Media – GOED's business marketing currently has about 3,400 Facebook, 1,600 Twitter, 400 LinkedIn, 300 Instagram and 75 Google+ followers. After working with your agency for a year, where should those numbers be, and how would you get us there? For the purposes of the RFP, assume the budget is up to \$30,000.

### **3.7 MEDIA BUYING EFFECTIVENESS**

**Evaluation of media buying effectiveness.** Because we are a non-profit government agency, we require an aggressive media buyer who will negotiate to provide the best possible placements and rates. Affidavits of performance are required.

1. What is the size of your media planning/buying department in terms of personnel, number of clients and workload?
2. Provide two examples of successful media buys relevant to GOED's markets that include television, online, print, social media, etc. Explain how you measure the success of these media buys and why they are considered to be successful. Include examples of value-add elements that were also negotiated in these media buys.

Submission to this RFP for GOED requires agency or media buying services to be licensed to standard media purchasing resources: Arbitron, Nielson, or other accredited media tracking services.

#### **4. COMPANY QUALIFICATIONS**

##### **4.1 AGENCY FACTS AND HISTORY**

Provide the size of the agency in number of employees and billings, and a list of premier agency accounts and current and/or former business-related clients.

##### **4.2 EXPERIENCE AND QUALIFICATIONS**

A statement of the company's and key personnel's previous experience with similar business/economic development projects and/or any other experience which qualifies him or her to successfully complete the project. Additional information or samples of materials used in previous projects must be submitted with this proposal. In addition, include the qualifications and business marketing experience and/or related experience of the account executive, graphic designer, accountant, media buyer, public relations, video producer/writer, and other creative staff that will be involved in the project.

The Contractor must have demonstrated business marketing or related experience in brand development and execution, media campaign oversight, creation and placement (media buying) of ads across all major media platforms, public relations, coordinating media campaigns and events and design and development of collateral materials that promote information, creates action to receive information, and increased public awareness. Examples of past work, i.e. television ads, print ads, online ads, social media activities, radio ads, etc. must be included.

##### **4.3 SUBCONTRACTING**

The planned use of any and all subcontractors must be clearly explained in the proposal. However, the prime offeror shall be responsible for all costs and contract performances if subcontractors are used. Current employees of the State of Utah or any other governmental agency and consulting affiliates of GOED may not participate as subcontractors of the award. GOED has the right to approve all subcontractors and review qualitative research conducted by the subcontractor.

##### **4.4 TIMEFRAME**

Assuming the agency of record is selected in December 2014, the selected agency will

be responsible for the creation and implementation of a business marketing ad campaign for 01Q15.

#### **4.5 SUMMARY**

Offeror should restate in one sheet or less, the specific reasons they feel they are best qualified, suited, and capable of being awarded the contract in question.

## **PART 3: INFORMATION REQUIRED IN SUBMISSION OF A RESPONSE**

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### **PROPOSAL RESPONSE FORMAT**

Proposals should be concise, straightforward and prepared simply and economically. Expensive displays, bindings or promotional materials are neither desired nor required. However, there is no intent in these instructions to limit a proposal's content or to exclude any relevant or essential data.

Please use 12-point type size in your response and demonstrate that your agency embraces "The Elements of Style," specifically:

"When a sentence is made stronger, it usually becomes shorter. Thus, brevity is a by-product of vigor."

And

"A single overstatement, wherever or however it occurs, diminishes the whole, and a carefree superlative has the power to destroy, for the reader, the object of the writer's enthusiasm."

All proposals must be organized and titled for the following headings:

- 1. Section Title: RFP Form.** The State's Request for Proposal form completed and signed by the offeror.
- 2. Section Title: Executive Summary.** The one or two page executive summary is to briefly describe the offeror's proposal. This summary should highlight the major features of the proposal. The reader should be able to determine the essence of the proposal by reading the executive summary.
- 3. Section Title: Protected Information.** All protected/proprietary information must be identified in this section of the proposal response, by completing the Claim of Business

Confidentiality form located at: <http://www.purchasing.utah.gov/vendorinformation.html>

If offeror's proposal response contains protected/proprietary information (refer back to the Protected Information section of this RFP for additional information) then offeror must submit a redacted copy of the proposal response at the same time offeror submits its proposal response. The redacted copy of the offeror's proposal response must be submitted in compliance with the other sections of this RFP.

**Offeror acknowledges that its proposal response or redacted copy will be made public upon the State's receipt of a GRAMA request. Offeror will not be notified of any GRAMA request made to the State for offeror's proposal response.** If offeror submits a redacted copy then the State will respond to a GRAMA request for offeror's proposal response with offeror's redacted copy. However, if offeror fails to submit a redacted copy then the State will respond to a GRAMA request with offeror's proposal response, which will result in offeror's protected/proprietary information, if any, being made public. Contractor acknowledges that notations in the header, footer or watermark of the proposal response will not be considered sufficient to constitute a request for non-disclosure of protected/proprietary information.

4. **Section Title: Potential Conflicts of Interest.** Identify any conflict, or potential conflict of interest, that might arise during the course of the project. If no conflicts are expected, include a statement to that effect in the Proposal.
5. **Section Title: Exceptions and Additions to the Standard Terms and Conditions.** Proposed exceptions and additions to the Standard Terms and Conditions ***must*** be submitted in this section. Offeror must submit a redline document in Word format identifying the proposed exceptions to the RFP terms and conditions with the proposal submission for review and evaluation purposes. Website URLs, or information on website URLs may not be requested in the RFP document and may not be submitted with a proposal. URLs provided with a proposal may result in that proposal being rejected as non-responsive. URLs are also prohibited from any language included in the final contract document.

Offeror must also provide the name, contact information, and access to the person(s) that will be directly involved in legal negotiations of the terms and conditions in the proposal response.

If there are no exceptions and additions to the Standard Terms and Conditions, indicate "None" in this section.

6. **Section Title: Mandatory Requirements.** Offeror must provide documentation/narrative demonstrating compliance with the stated Mandatory Minimum Requirements/Qualifications. Offeror's failure to meet any one of the mandatory requirements will result in the proposal response being classified as non-responsive and will not move forward in the evaluation process.
7. **Section Title: Detailed Technical Response.**

This section should constitute the major portion of the proposal and must be a concise overview of the offeror's assessment of the work to be performed, the offeror's ability and approach, and the resources necessary to fulfill the requirements. This should demonstrate the offeror's understanding of the desired overall performance expectations. Clearly indicate any options or alternatives proposed. In any case wherein the offeror cannot comply with a provision outlined in the "Detailed Scope of Work", such inability must be stated in response to the applicable requirement.

For ease of evaluation, Detailed Technical Response must be a point-by-point response, addressing in detail each area of the evaluation criteria.

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<b>1. Minimum Mandatory Requirements</b>	<b>RFP Section</b>
1 Offeror has an office located in the State of Utah	Part 2 #1
2 Account Manager is located in the State of Utah	Part 2 #1
<b>Scoreable Technical Criteria</b>	<b>RFP Section</b>
<b>2. Demonstrated Ability to Meet Detailed Requirements</b>	
1 Ability to comply with GOED requirements	Part 2, #2.1-2.6
<b>3. Demonstrated Ability to Meet Detailed Scope of Work</b>	
1 Narrative of unique capability	Part 2, #3.1
2 Branding	Part 2, #3.2
3 Marketing & Advertising	Part 2, #3.3
4 Public Relations & Research	Part 2, #3.4
5 Accountability	Part 2, #3.5
5 Campaigns	Part 2, #3.6
6 Media Buying Effectiveness	Part 2, #3.7
<b>4. Company Qualifications</b>	
1 Agency Facts & History	Part 2, #4.1
2 Experience & Qualifications (including personnel)	Part 2, #4.2
3 Subcontracting	Part 2, #4.3
4 Timeframe	Part 2, #4.4
5 Summary	Part 2, #4.5

8. **Section Title: Cost Proposal.**  
Please enumerate all costs on **Attachment B- Cost Proposal Form.**

**Cost will be evaluated independently from the Technical response, and must be submitted separate from the Technical response.**

**Inclusion of any cost or pricing data within the technical proposal may result in your proposal being judged as non-responsive.**

## **PART 4: RESPONSE EVALUATION**

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### **PROPOSAL EVALUATION**

All proposals in response to this RFP will be evaluated in a manner consistent with the Utah Procurement Code, rules, policies and the evaluation criteria established in the RFP.

Each Offeror bears sole responsibility for the items included or not included within the response submitted by the Offeror.

A committee will evaluate proposals against the weighted criteria identified. Each area of the evaluation criteria must be addressed in detail in proposal.

### **Proposal Evaluation Process**

#### **Stage 1: Initial Review**

In the initial phase of the evaluation process, the conducting procurement unit will review all proposals timely received. Unacceptable proposals (non-responsive proposals not conforming to RFP requirements or unable to meet the minimum and/or mandatory requirements) will be eliminated from further consideration.

#### **Stage 2: Technical Proposal Evaluation**

Acceptable proposals will be forwarded to the evaluation committee. Proposals will be evaluated against the proposal evaluation criteria as follows:

<b><u>Evaluation Criteria</u></b>	<b><u>Points</u></b>
Demonstrated ability to meet the Detailed Requirements	25 pts.
Demonstrated Ability to Meet Detailed Scope of Work	200 pts.
Company Qualifications	95 pts.

Offerors that achieve 70% (224 pts.) of the total technical score (320 points) will proceed to Phase 3, Oral Presentation Evaluation. Offerors with a score of less than the minimum required technical score will be deemed unacceptable and ineligible for further consideration.

#### **Stage 3: Oral Presentations**

Firms successful in the technical evaluation will advance to Stage 3, Oral Presentations. Oral presentations will be made at the offerors expense. Oral presentations will be scheduled for early December 2014.

The offeror's original proposal cannot be changed in any aspect at the oral presentation. The

oral presentation will provide offerors the opportunity to bring to the attention of the Evaluation Committee any aspects of their offer that may contribute to the selection of their response. It is an opportunity for offerors to sell the merits of their submission.

Offerors are advised that the Evaluation Committee will be afforded the opportunity to revise their detailed technical evaluation scores based upon the oral presentation.

The procurement officer shall establish a date and time for the oral presentations and will notify eligible offerors of the protocols, procedures, and structure of the oral presentations. Oral presentations will be made at the offeror's expense.

Offerors invited to oral presentations will be required to address the three scenarios identified in the RFP (Part 2. section 3, 3.6 Campaigns) as part of the oral presentation, including the following for each campaign scenario:

- Recommended approach to research
- Creative messaging
- Mix of promotional channels – e.g. social media, print/online advertising, trade shows/events, PR etc.
- Campaign budget allocation and timeline

A committee will evaluate the finalists' presentations based on the following weighted criteria:

- 1) Target Markets (60 points)
  - a. Recommended geographic markets (20)
  - b. Recommended demographics of targeted potential visitors (20)
  - c. Recommended psychographics of targeted market (20)
- 2) Media (30 points)
  - a. Recommended media (15)
  - b. Media buy budget (15)
- 3) Creative (100 points possible)
  - a. Emotional connection to brand (50)
  - b. Differentiation from competitors (50)
- 4) Timeline (25 points possible)
  - a. Ability to implement campaign quickly (25)
- 5) Campaign Scenario Budget Allocation (30 points)

#### **Stage 4: Cost Proposal Evaluation**

Firms successful in the technical evaluation will advance to Stage 4, Cost Proposal Evaluation as follows:

## Evaluation Criteria

## Points

Blended Hourly Rate

63 Points

The offeror with the lowest blended hourly rate will receive the maximum 63 points. All other offerors will receive points as determined by the ratio\* of their cost to the lowest cost. Final cost scores will be calculated based on the following:

\*Ratio Calculation: Points assigned to each offeror's cost proposal will be based on the lowest proposal price. The offeror with the lowest Proposed Price will receive 100% of the price points. All other offerors will receive a portion of the total cost points based on what percentage higher their Proposed Price is than the Lowest Proposed Price. An Offeror whose Proposed Price is more than double (200%) the Lowest Proposed Price will receive no points. The formula to compute the points is:  $\text{Cost Points} \times (2 - \frac{\text{Proposed Price}}{\text{Lowest Proposed Price}})$ .

## **AWARD OF CONTRACT**

After the evaluation and final scoring of proposals is completed, the procurement officer shall award the contract as soon as practicable (except as provided in Section §63G-6a-708 Cost Benefit Analysis) to the eligible responsive and responsible offeror with the highest score.

The State reserves the right to award the contract(s) to a technically qualified lower cost offeror(s) in the event the high scoring offer is determined to not be the best value offered to the State, based on a cost benefit analysis.

All offerors should note that Section 63G-6a-402(6) UCA requires the issuing procurement unit, for the duration of any contract awarded through this RFP, to make available contact information of the winning contractor to the Department of Workforce Services in accordance with Section 35A-2-203 of the Utah Code. This requirement does not preclude a contractor from advertising job openings in other forums throughout the state.

## **COST-BENEFIT ANALYSIS**

The Utah Procurement Code §63G-6a-708, requires a cost-benefit analysis to be completed by the State if the highest score awarded by the Evaluation Committee, including the score for cost, is awarded to a proposal other than the lowest cost proposal, and the difference between the cost of the highest scored proposal and the lowest cost proposal exceeds the greater of \$10,000 or 5% of the lowest cost proposal. The statute outlines the procedures and processes to be used by the State prior to making a final award.

## **DEBRIEFING OF UNSUCCESSFUL OFFERORS**

The Utah Procurement Code and Administrative Rules do not require debriefings. The Division of Purchasing and State Agencies under the jurisdiction of the Division of State Purchasing do not conduct debriefings.

