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Request for Proposal

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Taylor Murphy Center  
Marketing and Media Relations

November 3, 2010

Important Dates

Pre-Proposal Conference:

10:00 a.m. EST – Tuesday, November 16, 2010

**Deadline for Receipt of Proposals:**

**3:00 p.m. EST – Monday, November 22, 2010**

[Please Note: Firms must submit one paper copy *and* one electronic copy of their proposal]



College of William and Mary  
George Mason University  
James Madison University  
Old Dominion University  
Radford University  
The University of Virginia  
Virginia Commonwealth University  
Virginia Military Institute  
Virginia Tech

A VASCUPP Member Institution

Issued by

Procurement Services

Charlottesville, Virginia

## A. GENERAL INFORMATION

**Request for Proposal (“RFP”) Name:** Tayloe Murphy Center Marketing and Media Relations

**RFP Number:** #FF110310

**Issue Date:** November 3, 2010

**Brief Description:** The Tayloe Murphy Center (“TMC”) at the University of Virginia (“University”) Darden Graduate School of Business Administration (“Darden”) seeks a consulting partner for brand-building and programmatic efforts for the 2010-2011 year, and with continued strong performance, beyond. The ideal firm would have experience in media relations, community engagement, and event management, especially in the Commonwealth of Virginia (“COV”).

**Preproposal Conference:** An optional Preproposal Conference will be held on Tuesday, November 16, 2010 at 10:00 a.m. EST at the Darden Graduate School of Business Administration in Classroom 30 (within the Classroom Wing of Saunders Hall), Charlottesville, Virginia (maps may be viewed at this web site: <http://www.virginia.edu/Map/>).

The purpose of the Preproposal Conference is to allow potential interested parties the opportunity to present questions and obtain clarification relative to any facet of this RFP. While attendance at this conference will not be a prerequisite to submitting a proposal, interested parties who intend to submit a proposal are strongly encouraged to attend. Bring a copy of this solicitation with you.

Firms planning to attend the Preproposal Conference should notify Rebecca Sims by email ([pur-rfp@virginia.edu](mailto:pur-rfp@virginia.edu)) no later than 3:00 p.m. EDT on Friday, November 12, 2010 of the names, titles, and phone numbers of the individuals who will attend.

**Proposal Due Date:** 3:00 p.m. (EST) on Monday - November 22, 2010

Firms will send one original paper copy their proposal(s) to the address listed in the contact information box below. Additionally, firms will also send a complete electronic version of their proposal(s), formatted in Microsoft Word, to the email address listed in the contact information box below. The University reserves the right to reject proposals received after the stated due date and time.

**Oral Presentations/Negotiations:** An Oral Presentation by two or more firms may be required after written proposals are received by the Parties. Each firm should be prepared to discuss and substantiate any of the areas of the proposal it submitted, its own qualifications for the services required and any other area of interest relative to its proposal.

Negotiations with two or more firms will be conducted by the University on the firms' financial proposals and proposed terms and conditions.

Oral Presentations/Negotiations will be held simultaneously are tentatively scheduled for the morning of Tuesday, December 7, 2010.

**Expected Award Date:** January 15, 2011

**Term of Agreement:** The term of a resulting Agreement or Purchase Order will be for five years, with the ability to renew on the same or similar terms and conditions, for two additional one-year periods if

mutually agreeable to the University and the Selected Firm. The Selected Firm and the University will mutually agree at least 180 days prior to each renewal period whether to renew the terms of the Agreement.

**REFER ALL QUESTIONS TO THE ISSUING OFFICE:**

UNIVERSITY OF VIRGINIA  
Department of Procurement Services  
1001 North Emmet St, Carruthers Hall  
P.O. Box 400202  
Charlottesville, VA 22904-4202  
Attention: Frank F. Fountain  
Phone: 434-982-3092  
Email: [fff3x@virginia.edu](mailto:fff3x@virginia.edu)

NOTE 1: If RFP proposal is sent U.S. Postal Service, use the P. O. Box. The University does not take responsibility for lost or misdirected mail.

NOTE 2: During the RFP process, all communication must be directed to the buyer listed above, with the exception of issues directly related to SWAM business and SWAM subcontracting opportunities. Such SWAM issues may be alternately directed to Bill Cooper, the University's Director of Supplier Diversity, at (434) 924-7174 or [SWAM@virginia.edu](mailto:SWAM@virginia.edu). Any failure to adhere to this requirement may result in the rejection of the firm's proposal or cancellation of the RFP.

This Request for Proposal (RFP) has been posted on Procurement Services web site for your convenience. Addenda and attachments are posted if issued. The RFP can be downloaded at this web site: <http://www.procurement.virginia.edu/pagerfp>. It is the firm's responsibility to ensure that the latest version of the entire RFP and related links are reviewed prior to submission of a proposal. We encourage you to check the web site frequently for any changes prior to the due date. Call (434) 924-1346 if you have trouble accessing the RFP from the web. For questions about the content of the RFP, contact the buyer listed above. Additional information can be found on Procurement Services web site: <http://www.procurement.virginia.edu>.

For ease of reference, each firm or individual receiving this RFP is referred to as a "firm" and the firm or individual selected to provide services for the University is referred to as the "Selected Firm." This RFP states the instructions for submitting proposals and the procedure and criteria by which a firm may be selected.

## **B. SCOPE OF GOODS & SERVICES**

The University, Darden and the TMC seek a qualified firm or firms to provide consulting services for brand-building and programmatic efforts in conjunction for the TMC. It is the University's intent to enter into an Agreement with (and/or issue a Purchase Order to) the Selected Firm(s) which will include those goods and services necessary to help the University achieve its goals as outlined in this RFP (the "Goods and Services").

**Background:** The University's TMC conducts research and develops programs that foster entrepreneurship and entrepreneurial finance in high-poverty, high unemployment, low-growth areas, especially in the COV. The mission of the TMC is to facilitate community competitiveness through the development of practical research on what makes communities globally competitive, the dissemination of that knowledge to practitioners in the field and the sponsorship of interaction between stakeholders committed to making communities globally competitive. TMC was re-positioned in school year 2009-

2010, with a communications strategy to build awareness of the TMC mission among key stakeholder groups. The TMC employs a core team of staff, and engages high-quality consultants with specific executional experience to complete programmatic efforts.

**Initial Branding Efforts:** At the beginning of the 2009-2010 academic year, the TMC was relaunched with low awareness among key target audiences (*e.g.*, economic development professionals, government officials, entrepreneurs in target areas, finance professionals in the Commonwealth). The low existing awareness was a result of earlier iterations of the center with different missions. Where awareness did exist, there was lingering confusion regarding an existing unit within Darden using the name Tayloe Murphy International (TMI). With support of the TMC advisory board a recommendation was made to Darden leadership to change the name. The Center was renamed the Tayloe Murphy Center (TMI-International is now the Darden Center for Global Initiatives).

**Awareness Building:** The initial awareness-building strategy has three prime directives: a) reclaim the original name, legacy and heritage while concurrently relaunching an overt economic-development mission; b) create multiple impressions in relevant media vehicles and with key stakeholders; c) initiate a program that would be relevant to key stakeholder audiences (recognizing that “relevance drives news value”).

The following provides key elements of the initial year’s plan:

**TMC Brochure:** A glossy eight-page brochure as an insert in the center of the March 2010 edition of *Virginia Business Magazine*. This piece was also adapted to a direct-mailer to 26,000 business owners, in target geographic areas. A digital version of this brochure was delivered via electronic announcements to key stakeholder representatives across the COV (*e.g.*, economic development groups, government officials, business groups, trade associations, chambers of commerce). A key element within each of these communication vehicles was the initial launch of the *Tayloe Murphy Resilience Awards* (described below).

**Website:** A new website was also launched in March of 2010. In addition to being an information portal, the site also served as the portal to online applications for the Resilience Awards. The site includes a blog and news updates. Since the launch we have had 3,448 unique page views from all pages on the website, including 1,533 for the Resilience Awards page. Average “time on page” across all pages is about 1:30 (compared to an overall Darden site average of 1:11). Average “time on page” for the *Resilience Awards* page is 2:37. A Google search for “Tayloe Murphy Center” now returns our website as the top result. A nascent social media presence for the center is being developed (*i.e.*, Facebook, Twitter).

**Resilience Awards:** With the intent to build awareness of the TMC and create news value across the COV, TMC conceived and executed the 1<sup>st</sup> annual *Resilience Awards*. This initiative, designed to highlight leading businesses within the COV’s economically-challenged areas, is rooted in the TMC mission and will serve as an annual anchor to promote the TMC mission and brand. The campaign resulted in 106 applicants in this initial year, with mean five-year growth rates of 188% in revenues and 54% in employment (note that these are annual averages, not cumulative rates).

**Stakeholder Outreach and Relationship-Building:** Recognizing the importance of personal and local advocacy, center leadership planned on-site visits and meetings with civic, banking, economic development and business leaders in a select set of key target areas (characterized by high unemployment, poverty and low self-employment). These key areas include Danville, Franklin, Roanoke, Wise, Petersburg, and Galax. We also have established presence through

lectures at events aligned with our mission (Secretary of Commerce and Trade, Tobacco Commission, Virginia Business Incubator Association, Virginia Economic Development Authority, Virginia Hispanic Chamber of Commerce). Including this and other outreach initiatives, we have met with key stakeholders and, while promoting the *Resilience Awards*, spoken with business owners in targeted areas throughout the COV. We have secured a developed contact list of these stakeholders, including their physical and electronic addresses.

**Research:** Recognized thought leadership among news media and policymakers is a key strategy of TMC. In the 2009-2010 academic year, TMC initiated a research study of the Latino community in the COV, which has substantial presence and is growing rapidly in the COV, and the concomitant financial needs of this community in small business and personal finance. TMC led a multi-scholar, collaborative research project employing multiple methods: econometric analysis, qualitative field interviews, quasi-experiments, and exemplar case studies. The intent for the project is to produce a practitioner-targeted publication, along with multiple manuscripts for peer-reviewed outlets.

**Key Tasks and Skills:** The following key tasks and skills will be found in the ideal firm. Firms are encouraged to provide a proposal(s) for an initial period of work for the remainder of the 2010-2011 academic year, with the understanding that (with positive review of initial performance) the potential period of work may extended into future academic years.

**Marketing Strategy and Media Advising:** The Selected Firm will provide advice on all elements of awareness-building, trial and repeat engagement. The partner will provide counsel to the TMC leadership team on all these matters, and anticipate evolving center needs and opportunities.

**Concept and Creative Execution:** The Selected Firm will be able to provide advice, and potentially, creative development for printed and digital executions.

**Unpaid Media Placement:** The Selected Firm would assist TMC in engaging with key media outlets, leading to placement of unpaid media to promote specific center programs and the brand generally. This work would include production of press releases, and liaison with Darden's communications office.

**Event Coordination and Management:** TMC's strategy includes fielding community-engagement activities in target areas. The Selected Firm would work with TMC to conceive, initiate, and manage these events. Flawless logistics and event management are a necessity, as is familiarity and facility in working in mission-relevant areas and the populations that reside there.

**Tracking and Record Keeping:** The Selected Firm will track all TMC-related marketing and outreach activities and recommend means to measure efficacy utilizing appropriate indices (*e.g.*, awareness, trial, repeat engagement). These indices will be a key element in deciding future work with the Selected Firm beyond the initial period.

**Weekly Activity and Budget Reporting:** The Selected Firm will provide a weekly report of activities and measured results, along with actual spending against projected budgets. Any changes in agreed activities that have significant budget impact or change in delivery periods will require communication prior to accrual.

## C. BASIS OF SELECTION

Proposals will be evaluated based upon the overall merits/value of the proposal including, but not limited to, price. The University will evaluate proposals, and if a firm is to be selected, select the firm on the basis of:

1. The firm's plan to provide the University with the products/services as described in the Scope of Good and Services section; along with the quality of the proposal, specifically, responsiveness to requirements and adequacy of information provided.
2. The firm's relevant experience, qualifications and success (as well as the experience of the assigned individuals), in providing the services outlined this RFP; with special emphasis on the specific geographic areas emphasized by the TMC.
3. The firm's references from clients who have engaged the firm in a comparable scope of work.
4. The firm's financial proposal including, but not limited to: discounts, service charges, other charges or alternate financial models, and the contractual terms which would govern the relationship between the University and the Selected Firm.
5. The firm's Small, Woman-owned and Minority-owned ("SWAM") businesses status and/or the firm's plan for utilization of SWAM businesses. For more information about SWAM and the University's SWAM plan, please see the letter at Attachment 1 and refer to the following site: [www.procurement.virginia.edu/main/publicpostings/rfp/SWAMplan.pdf](http://www.procurement.virginia.edu/main/publicpostings/rfp/SWAMplan.pdf).

*Note 1:* A 10% minimum weight will be given to this criterion in evaluating proposals.

*Note 2:* Any questions related to SWAM business and SWAM subcontracting opportunities can be directed to Bill Cooper, the University's Director of Supplier Diversity, at (434) 924-7174 or [SWAM@virginia.edu](mailto:SWAM@virginia.edu).

## D. CONTENTS OF PROPOSAL

Proposals will be prepared simply and economically, providing a straightforward, concise description of capabilities to satisfy the requirements of the RFP. Emphasis will be on completeness and clarity of content, and will be organized in the order in which the requirements are presented in the RFP.

Unnecessarily elaborate brochures and other presentations beyond that sufficient to present a complete and effective proposal are not desired and may be construed as an indication of a firm's lack of cost consciousness.

Elaborate artwork, expensive paper and bindings, and expensive visual and other presentation aids are neither necessary nor desired.

Firms will provide the following information:

1. The firm's approach to the key tasks and skills outlined above, including initial strategic recommendations on how the firm would help TMC achieve its awareness-building, trial and repeat engagement objectives.
2. A brief history of the firm and its experience, qualifications and success in executing against the type of strategic recommendations made in the proposal.

3. A detailed description and the full specifications of the services proposed for each key task listed above. Each firm will indicate in their proposal the firm's ability to achieve / comply with each key task. In the event that the firm wishes to propose an alternate strategy or method for reaching the stated goals of the proposal, the firm will detail their proposed change(s) and how the proposed change would compare to the listed specification. Proposals will be formatted in such a way to address each of the above tasks in a line-by-line process.
4. The firm's proposed price / fee for providing these services by task area.
5. At least three references where similar goods and/or services have been provided. Include the name of the firm / organization, the complete mailing address, and the name of the contact person and their telephone number.
6. The firm's Small, Woman-owned and Minority-owned (SWAM) businesses status and/or how the firm intends to utilize SWAM firms in regards to this particular procurement.
7. Provide a list of institutions of higher education with which the firm has signed a term contract.
8. Provide the amount of annual sales the firm has with each VASCUPP Member Institution. A list of the VASCUPP Members can be found at <http://www.vcu.edu/procurement/coopcon.htm>.
9. Complete and return the information requested in Attachment 2, Firm Information.

### **Virginia Freedom of Information Act**

Except as provided below, once an award is announced, all proposals submitted in response to this RFP will be open to the inspection of any citizen, or any interested person, firm or corporation, in accordance with the Virginia Freedom of Information Act. Trade secrets or proprietary information submitted by a firm as part of its proposal will not be subject to public disclosure under the Virginia Freedom of Information Act; however, the firm must invoke the protections of this section prior to or upon submission of its proposal, and must identify the specific data or other materials to be protected and state the reasons why protection is necessary. A firm may not request that its entire proposal be treated as a trade secret or proprietary information. Nor may a firm request that its pricing be treated as a trade secret or proprietary information, or otherwise be deemed confidential.

## **E. TERMS AND CONDITIONS**

This solicitation and any subsequent award(s) are subject to:

- The Selected Firm registering as a vendor with the University of Virginia. <https://www.procurement.virginia.edu/pagevendorregistrationform>;
- Unless otherwise deemed appropriate by the Procurement Services, the Selected Firm will enroll in one of the University approved methods for receipt of electronic payments. Accordingly, the Selected Firm agrees to accept Bank of America's ("BoA") ePayables® method of electronic payment or BoA's PayMode® method of electronic payment;
- The Selected Firm registering and accepting eVA Terms and Conditions prior to award: <http://www.eva.virginia.gov/>;
- The University's Mandatory Contractual Provisions: <http://www.procurement.virginia.edu/main/publicpostings/rfp/mandatoryprovisions.pdf>;



- The University's Preferred Contractual Provisions:  
<http://www.procurement.virginia.edu/main/publicpostings/rfp/preferredprovisions.pdf>;

**Note:** Unless a firm *expressly and specifically states its exception* to any of the Preferred Provisions in its written proposal, then the proposal from the firm will **automatically be deemed to include those Provisions**.

- The University's Procedure for Resolution of Contractual Claims  
<http://www.procurement.virginia.edu/main/publicpostings/rfp/resolution.pdf>.

**F. OTHER INFORMATION**

Additional Preferred Contractual Provisions:

A. Insurance

Listed below is the insurance the Selected Firm must maintain under any Agreement resulting from this RFP. In no event should the Selected Firm construe these minimum required limits to be their limit of liability to the University. The Selected Firm will maintain insurance which meets or exceeds the requirements of the University with insurance companies that hold at least an A- financial rating with A.M. Best Company. No Agreement will be executed by the University until the Selected Firm satisfies the insurance requirements of the University. The Selected Firm may be required to provide the University with a valid Certificate of Insurance before providing any goods or services to the University. The University reserves the right to approve any insurance proposed by the Selected Firm.

Commercial General Liability:

The Selected Firm and any Subcontractor will provide a minimum combined single Limit of Liability for bodily injury and property damage of \$1,000,000 per occurrence with coverage for the following coverage:

- |                                     |                     |                                     |                               |
|-------------------------------------|---------------------|-------------------------------------|-------------------------------|
| <input checked="" type="checkbox"/> | Premises/Operations | <input checked="" type="checkbox"/> | Products/Completed Operations |
| <input checked="" type="checkbox"/> | Contractual         | <input checked="" type="checkbox"/> | Independent Contractors       |
| <input checked="" type="checkbox"/> | Personal Injury     | <input checked="" type="checkbox"/> | Additional Insured*           |

Automobile Insurance:

The Selected Firm and any Subcontractor will provide a minimum combined single Limit of Liability for bodily injury and property damage of \$500,000 per accident with the following coverages for vehicles operated by their employees.

- |                                     |                |                                     |                                 |
|-------------------------------------|----------------|-------------------------------------|---------------------------------|
| <input checked="" type="checkbox"/> | Any Automobile | <input checked="" type="checkbox"/> | Owned and Non-Owned Automobiles |
|-------------------------------------|----------------|-------------------------------------|---------------------------------|

Errors & Omissions Insurance:

The Selected Firm and any Subcontractor will maintain errors and omissions liability insurance with a minimum limit of \$1,000,000 per claim. If such coverage is claims-made, the coverage will remain in effect for at least one year after the end of this contract, or extended reporting period coverage will be maintained for a least one year beyond the completion of providing services to the University.



\*Additional Insured:

The University will be named as an Additional Insured, and the proper name is: "The Commonwealth of Virginia, and the Rector and Visitors of the University of Virginia, its officers, employees, and agents."

B. Formation of the Agreement with the Selected Firm

All proposals received will first be carefully evaluated by the University, and then the University intends to conduct negotiations with two or more firms. After negotiations have been conducted, if the University chooses to make award, the University will select the firm which, in its opinion, best meets the needs of the University. Alternately, if the University determines in writing and in its sole discretion that only one firm is fully qualified, or that one firm is clearly more highly qualified than the others under consideration, it may decide to negotiate and award an agreement to that single firm. In either event, the University intends to execute a mutually satisfactory written agreement which will reflect and largely incorporate this RFP as reconciled with any pertinent documents, such as the proposal submitted and relevant negotiation correspondence.

**Because the University may choose to negotiate and award to a single firm, as discussed above, each firm must include in its written proposal all requirements, terms or conditions it may have, and should not assume that an opportunity will exist to add such matters after the proposal is submitted.**

Any firm(s) invited to negotiations should note that the University reserves the right to begin negotiations by combining the best aspects of submitted proposals from all responding firms as the basis for subsequent formation of any Agreement resulting from this RFP.

Firms should also note that, as described above, certain matters will automatically be deemed part of the proposal.

C. Term of Agreement

The term of any Agreement resulting from this RFP will be for five years, with the ability to renew on the same terms and conditions, for two additional one-year periods if mutually agreeable to the University and the Selected Firm. The Selected Firm and the University will mutually agree at least 180 days prior to each renewal period whether to renew the terms of the Agreement.

D. Confidentiality

All firms responding to this RFP represent and confirm that the contents of the firm's proposal(s) and any resulting Agreement are not confidential and will be open to the inspection of any interested person, firm or corporation, in accordance with the Virginia Freedom of Information Act.

E. Account Manager

The Selected Firm agrees to provide a named individual ("Account Manager") to implement, perform, and manage provision of the Goods and Services. The University must approve the appointment of the Account Manager prior to execution of any Agreement with the Selected Firm. The Account Manager will be the University's primary contact, although the Account Manager will be assisted by other members of the Selected Firm's staff in completing key activities.

In the event that the Account Manager (or any other individual responsible for the University's account) is no longer employed by the Selected Firm, is unavailable for any reason, or is

performing in an unsatisfactory manner (as solely determined by the University); the Selected Firm will propose a replacement for that individual within a reasonable time frame, so as not to significantly delay the provision of the Goods and Services to the University. The University reserves the right to approve the replacement, or to cancel any resulting Agreement. If the University accepts a proposed replacement, the replacement will provide the Goods and Services at rates no higher than previously agreed and in accordance with all terms and conditions specified in the resulting agreement.

Odwyerpr.com

**Attachment 1**

**Executive Vice President and Chief Operating Officer's  
Request for Commitment**



Greetings:

The quality of service the University of Virginia is able to deliver to its customers is directly related to the excellent support we receive from you and many other outstanding suppliers of goods and services. Without you, we would not be able to fulfill our educational, health care and research missions. An important part of our procurement program involves our commitment to doing business with small, women-and minority-owned (SWAM) businesses. As one of our most important vendors, we look to you to help us achieve this objective.

We conduct substantial business with small firms. We have been less effective in securing long-term business relationships with minority-and women-owned businesses. We are determined to improve our record.

I seek your assistance in two areas. First, to the extent practical, I ask that you involve small, women-and minority-owned businesses in the delivery of services you provide to UVa. Second, I seek your help in reporting your results through our quarterly subcontracting reports. The terms and conditions previously provided to your organization outlined this process.

This effort is important to us. We depend on you in so many ways – this is another way that we can partner with your company to make things better.

Sincerely,

A handwritten signature in black ink, appearing to read "Leonard W. Sandridge".

Leonard W. Sandridge  
Executive Vice President and Chief Operating Officer

LWS:dr

Madison Hall · Post Office Box 400228 · Charlottesville, Virginia 22904-4228

**Attachment 2**  
**Firm Information**

**Full Legal Name** (*Company name as it appears with your Federal Taxpayer Number*):

**Address:**

**Telephone Number:**

**FAX Number:**

**Web Address:**

**Email Address:**

**DUNS Number:**

**SWAM Information:**

**Is your firm certified with the Commonwealth of Virginia's Department of Minority Business Enterprises (DMBE):**  Yes  No

**Minority-Owned Business:**  Yes  No

**Women-Owned Business:**  Yes  No

**Small-Owned Business:**  Yes  No

**Is your firm registered as a vendor in the Commonwealth of Virginia's e-procurement system (eVA)?**  Yes  No

**Point of Contact for this Proposal:**

**Name:**

**Address:**

**Office No.**

**Mobile No.**

**FAX No.**

**Email Address:**