



**COLORADO MESA UNIVERSITY
REQUEST FOR PROPOSALS and QUALIFICATIONS
FOR
MARKETING SERVICES 2023
CMU-22-2745**

RFP ISSUE DATE: November 4, 2022
PROPOSAL DUE DATE: December 5, 2022, 11:00 a.m.
ISSUED BY: Suzanne Ellinwood
Purchasing Manager

Proposals will be accepted until 11:00 a.m. Mountain Standard Time, December 5, 2022.

Bids will be accepted electronically through the Rocky Mountain ePurchasing [RMEPS] website <https://www.bidnetdirect.com/colorado>. The Rocky Mountain ePurchasing site offers both free and paid registration options that allow for full access of the solicitation documents and for electronic submission of proposals. [Note: Free registration on the site may take up to 24 hours to process; plan registration to allow time for on-time bid submission.] Colorado Mesa University does not have access or control of the vendor side of the RMEPS site, contact RMEPS directly to resolve any issues encountered prior to response deadline (800) 835-4603

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NOTE: To simplify the Colorado Mesa University’s review process, the format for all Proposals must be consistent with the format in Section 4, "Offeror’s Response Format." In addition, the Vendor Signature Form must be completed and signed by an authorized company representative.

SECTION 1: ADMINISTRATIVE INFORMATION

1. ISSUING OFFICE:

This Request for Proposal (RFP) is issued on behalf of the CMU Department of Marketing and Communications and issued by Purchasing Department. The Purchasing Department is the SOLE point of contact concerning this RFP. All communication must be done through the Purchasing Department.

2. OFFICIAL MEANS OF COMMUNICATION:

During the solicitation process for this RFP, all official communication between the Purchasing Department and Offerors will be via postings on the Rocky Mountain ePurchasing System <http://www.rockymountainbidsystem.com/> and the Colorado Mesa University's Purchasing website at: <http://www.coloradomesa.edu/purchasing/opensolicitations.html>. Colorado Mesa University Purchasing Department will post notices which will include, but not be limited to, any modifications to administrative or performance requirements, answers to inquiries received, clarifications to requirements, and the announcement of the apparent winning Offeror. **It is incumbent upon Offerors to carefully and regularly monitor the Rocky Mountain ePurchasing website for any such postings.**

3. PURPOSE:

This RFP provides prospective Offerors with sufficient information to enable them to prepare and submit proposals for consideration by the Purchasing Department to satisfy the need for expert assistance in the completion of the goals of this RFP.

A. DEFINITIONS

1. In the following RFP the term "University" shall be understood to mean "Colorado Mesa University."
2. The term "Offeror," as used herein, shall be understood to mean the individual, company, corporation or firm formally submitting a response to this RFP, and may also be referred to as the "Bidder," "Vendor" or "Contractor."
3. The term "Response," as used herein, shall be understood to mean a written offer to provide goods and/or services in accordance with the general conditions, instruction, and specifications stated herein with the exceptions clearly stated, and may be used interchangeably with the terms "Proposal" and "Bid".

4. SCOPE:

This RFP contains the instructions governing the proposal to be submitted and the material to be included therein; mandatory requirements which must be met to be eligible for consideration; and other requirements to be met by each proposal.

5. SCHEDULE OF ACTIVITIES

RFP Issue Date, Advertisement	November 4, 2022
Written Inquiries Due	November 16, 11:00 a.m. MST
Response to Written Inquiries	November 21, 2022
Proposal Submission Deadline	December 5, 2022 11:00 a.m. MST
Notification of Short Listed Firms	December 9, 2022 (estimated)
Oral Presentations by Finalists*	Week of December 12, 2022
Notice of Award	Week of December 19 (estimated)
Contract Issued	Week of January 9 (estimated)

7. INQUIRIES:

Offerors may make written e-mail inquiries concerning this RFP to obtain clarification of requirements. No inquiries will be accepted after the date and time indicated in the Schedule of Activities. Offerors shall confirm successful receipt of said inquiries. Send all inquiries to:

Suzanne Ellinwood, Colorado Mesa University Purchasing Department
sellinwo@coloradomesa.edu

Response to any Offeror's inquiries will be published as a modification on the Rocky Mountain ePurchasing System in a timely manner per the Schedule of Activities. Offerors should not rely on any other statements that alter any specification or other term or condition of the RFP.

8. MODIFICATION OR WITHDRAWAL OF PROPOSALS:

Proposals may be modified or withdrawn by the Offeror prior to the established submission due date and time.

9. PROPOSAL SUBMISSION:

Proposals must be received on or before the date and time indicated in the Schedule of Activities. Bids will be accepted electronically through the Rocky Mountain ePurchasing [RMEPS] website <https://www.bidnetdirect.com/colorado> The Rocky Mountain ePurchasing site offers both free and paid registration options that allow for full access of the solicitation documents and for electronic submission of proposals. [Note: Free registration on the site may take up to 24 hours to process; plan registration to allow time for on-time bid submission.] Colorado Mesa University does not have access or control of the vendor side of the RMEPS site, contact RMEPS directly to resolve any issues encountered prior to response deadline (800) 835-4603 The Vendor Signature Form MUST be signed electronically by the Offeror or an officer of the Offeror legally authorized to bind the Offeror to the proposal. The Signature form is to be included with the proposal.

Proposals which are determined to be at a variance with this requirement may not be accepted.

10. BID OPENING:

Due to the complexity of this Proposal, information provided at the bid Opening shall be restricted to the NAME AND NUMBER OF RESPONDERS. Inspection of the Offerors' proposals will not be allowed until after the notice of intent to award is posted on the Rocky Mountain ePurchasing system.

11. ADDENDUM OR SUPPLEMENT TO REQUEST FOR PROPOSAL:

In the event that it becomes necessary to revise any part of this RFP, an addendum notice will be posted on the Rocky Mountain Bids website at , <http://www.rockymountainbidsystem.com/> and the Purchasing website at <http://www.coloradomesa.edu/purchasing/opensolicitations.html> Bidders shall not rely on any other interpretations, changes or corrections.

12. WRITTEN INQUIRIES AND RESPONSES:

Any explanation desired by an Offeror regarding the meaning or interpretation of any Request for Proposal provision must be submitted in writing and clearly marked with the RFP number and title. Inquiries can be e-mailed to the point of contact for the Request for Proposal; it is incumbent upon the Offeror to verify receipt of written inquiries. Written responses to inquiries will be provided as an addendum to be posted on the Rocky Mountain Bids website, <http://www.rockymountainbidsystem.com> and the Purchasing website on the date shown in the Schedule of Activities.

13. ORAL PRESENTATIONS/SITE VISITS:

The Evaluation Committee may conclude after the completion of the proposal evaluation that oral interviews/presentation and/or demonstrations are required in order to determine the successful Offeror. All Offerors may not have an opportunity to interview/present and/or give demonstrations. The presentation process will allow the Offerors to demonstrate their proposal offering, explaining and/or clarifying any unusual or significant elements related to their proposals. Offeror's key personnel may be required to participate in a structured interview to determine their understanding of the requirements of this proposal, their authority and reporting relationships within their firm, and their management style and philosophy.

Detailed notes of oral interviews/presentations and/or demonstrations may be recorded and supplemental information (such as briefing charts, etc.) may be accepted. Additional written information gathered in this manner shall not constitute replacement of proposal contents.

Once oral interviews/presentations and/or demonstrations have been completed Colorado Mesa University reserves the right to make a contract award without any further discussion with the Offerors regarding the proposals received.

Any cost incidental to the oral interviews/presentations and/or demonstrations shall be borne entirely by the Offeror.

14. ACCEPTANCE OF RFP TERMS:

A proposal submitted in response to this RFP shall constitute a binding offer. Acknowledgment of this condition shall be indicated by the signature of the Offeror, or an officer of the Offeror legally authorized to execute contractual obligations. A submission in response to this RFP acknowledges acceptance by the Offeror of all terms and conditions including compensation, as set forth herein. An Offeror shall identify clearly and thoroughly any variations between its proposal and the University's RFP. Failure to do so shall be deemed a waiver of any rights to subsequently modify the terms of performance, except as outlined or specified in the RFP.

15. PROTESTED SOLICITATIONS AND AWARDS:

Any actual or prospective Offeror or contractor who is aggrieved in connection with the solicitation or award of a contract may protest to the University Purchasing Manager. The protest shall be submitted in writing within seven working days after such aggrieved person knows, or should have known, of the facts giving rise thereto. [Reference Colorado Revised Statutes (CRS) Section 24-109-101 et. seq., 24-109-201 et. seq.

With regard to the emphasized language above, it is important for Offerors to note that a challenge to the solicitation's requirements or specifications should be made within 7 days of when the protested item is known. In other words, if you believe that the solicitation contains a requirement you want to protest, the protest should be submitted within the 7-day time period, even if that means it is filed *during* the time the solicitation is still open.

As noted in the paragraph above, announcement of the apparent winning Offeror will be made via a posting on the Rocky Mountain Bids system. The requirement for timely submission of any protest (7 working days) will begin on the first working day following posting of the award notice on Rocky Mountain Bids.

16. CONFIDENTIAL/PROPRIETARY INFORMATION:

Any restrictions of the use or inspection of material contained within the proposal shall be clearly stated in the proposal itself. The Offeror must state specifically what elements of the proposal are to be considered confidential/proprietary. Confidential/proprietary information must be readily identified, marked and separately packaged from the rest of the proposal. Co-mingling of confidential/proprietary and other information is NOT acceptable. Neither a proposal in its entirety, nor proposal price information will be considered confidential/proprietary. Any information that will be included in any resulting contract cannot be considered confidential.

17. RFP RESPONSE MATERIAL OWNERSHIP:

All material submitted regarding this RFP becomes the property of Colorado Mesa University. Proposals may be reviewed by any person after the "Notice of Intent to Make an Award" letter has been issued, subject to the terms of § 24-72-201 et.seq. CRS, as amended, Public (open) Records.

18. PROPOSAL PRICES:

Estimated proposal prices are not acceptable. Proposal prices will be considered to be your best and final offer, unless otherwise stated in the RFP. The proposal price will be considered in determining the apparent successful Offeror.

19. DISCUSSION WITH RESPONSIBLE OFFERORS AND REVISIONS TO PROPOSAL:

Discussions may be conducted with responsible Offerors who submit proposals determined to be reasonably susceptible of being selected for award; for the purpose of clarification to assure full understanding of, and responsiveness to, the solicitation requirement. Offerors shall be accorded fair and equal treatment with respect to any opportunity for discussions and revision of proposals, and such revisions may be permitted after submissions and prior to award, for the purpose of obtaining best and final offers. In conducting discussions, there shall be no disclosure of any information derived from proposals submitted by competing Offerors.

The University reserves the right to hold discussions with Offerors who have been found to be in the competitive range, such discussions may result in the University conducting Best & Final Offers.

20. SELECTION OF PROPOSAL:

As described within the RFP, an Evaluation Committee will review and score offers submitted and make a recommendation for award. The selection will be for award to the responsible Offeror whose proposal is determined to be most advantageous to the University. The Purchasing Department, after review and approval of the evaluation committee's written recommendation, will notify all Offerors via a posting on the Rocky Mountain Bids system of the results of the RFP evaluation. The posting will be an announcement of the "Notice of Intent to Make an Award" will name the apparent successful Offeror.

21. AWARD OF CONTRACT:

The award will be made to the responsive and responsible Offeror whose proposal, conforming to the RFP, will be the most advantageous to Colorado Mesa University, price and other factors considered. A contract must be completed and signed by all parties concerned. In the event the parties are unable to enter into a contract, the State may elect to cancel the "Notice of Intent to Make an Award" letter and make the award to the next most responsible Offeror.

22. ACCEPTANCE OF PROPOSAL CONTENT:

The contents of the proposal (including persons specified to implement the project) of the successful Offeror will become contractual obligations if acquisition action ensues. Failure of the successful Offeror to accept these obligations in a contract may result in cancellation of the award and such Offeror may be removed from future solicitations. Under these conditions, the University reserves the right to enter into negotiations with the next ranking bidder on the same terms and conditions as set forth in the Request for Proposal

23. STANDARD CONTRACT:

The successful bidder will enter into a contract with the University. The State Contract contains certain required provisions for doing business with the State of Colorado, labeled "Special Provisions." The Special Provisions are required to be contained in every state contract without modification or exception. The Offeror shall include with its proposal a separate page entitled "Exceptions to Contract Terms," setting forth in detail all objections and exceptions it may have to any other terms and provisions contained in the special provisions, and failing such, shall be deemed to have accepted such terms and provisions. Failure to accept the University's standard contract provisions may result in cancellation of the award. The State Contract, including the Special Provisions, is attached electronically as a separate PDF document

24. RFP CANCELLATION:

The University reserves the right to cancel this Request for Proposal at any time, without penalty.

25. OWNERSHIP OF CONTRACT PRODUCTS/SERVICES:

Proposals, upon established opening time, become the property of the Colorado Mesa University. All products/services produced in response to the contract resulting from this RFP will be the sole property of the Colorado Mesa University unless otherwise noted in the RFP. The contents of the successful Offeror's proposal will become contractual obligations.

26. INCURRING COSTS:

Colorado Mesa University is not liable for any cost incurred by Offerors prior to issuance of a legally executed contract. No proprietary interest of any nature shall accrue until a contract is awarded and signed by all concerned parties.

27. MINORITY- OWNED/WOMAN-OWNED PARTICIPATION:

It is the State's intent to achieve the goals of the Governor's Executive Orders D0055-87 and D0005-94 regarding minority/woman-owned businesses. Offerors are reminded it is illegal to discriminate.

28. NON-DISCRIMINATION:

The Offeror shall comply with all applicable state and federal laws, rules and regulations involving non-discrimination on the basis of race, color, religion, national origin, age or sex.

29. REJECTION OF PROPOSALS:

The University reserves the right to reject any or all proposals and to waive informalities and minor irregularities in proposals received and to accept any portion of a proposal or all items proposed if deemed in the best interest of Colorado Mesa University.

30. PARENT COMPANY:

If an Offeror is owned or controlled by a parent company, the main office address and parent company's tax identification number shall be provided in the proposal. The tax identification number provided must be that of the Offeror responding to the RFP.

31. NEWS RELEASES:

News releases pertaining to this RFP shall NOT be made prior to execution of the contract without prior written approval by the University.

32. CONTRACT CANCELLATION:

The University reserves the right to cancel, for cause, any contract resulting from this RFP by providing timely written notice to the offeror.

33. CERTIFICATION OF INDEPENDENT PRICE DETERMINATION:

1. By submission of this proposal, each Offeror, and in the case of a joint proposal, each party thereto, certified as to its own organization, that, in connection with this procurement:
 - a. The prices in this proposal have been arrived at independently, without consultation, communication, or agreement, for the purpose of restricting competition, as to any matter relating to such prices with any other Offeror or with any competitor;
 - b. Unless otherwise required by law, the prices which have been quoted in this proposal have not been knowingly disclosed by the Offeror and will not knowingly be disclosed by the Offeror prior to opening, directly or indirectly to any other Offeror or to any Competitor; and
 - c. No attempt has been made or will be made by the Offeror to induce any other person or firm to submit or not to submit a proposal for the purpose of restricting competition.
2. Each person signing the Invitation for Bid form of this proposal certified that:
 - a. They are the person in the Offeror's organization responsible within that organization for the decision as to the prices being offered herein and that they have not participated, and will not participate, in any action contrary to (1)(a) through (1)(c) above; or
 - b. They are not the person in the Offeror's organization responsible within that organization for the decision as to the prices being offered herein but that he has been authorized in writing to act as agent for the persons responsible for such decision in certifying that such persons have not participated, and will not participate, in any action contrary to (1)(a) through (1)(c) above, and as their agent does hereby so certify; and he has not participated, and will not participate, in any action contrary to (1)(a) through (1)(c) above.
3. A proposal will not be considered for award where (1)(a), (1)(c), or (2) above has been deleted or modified. Where (1)(b) above has been deleted or modified, the proposal will not be considered for award unless the Offeror furnishes with the proposal a signed statement which sets forth in detail the circumstances of the disclosure and the head of the agency, or his designee, determines that such disclosure was not made for the purpose of restricting competition.

34. CONFLICTS OF INTEREST:

The holding of public office or employment is a public trust. A public officer or employee whose conduct departs from his fiduciary duty is liable to the people of the State. Rules of conduct for public officers and state employees:

1. Proof beyond a reasonable doubt of commission of any act enumerated in this section is proof that the actor has breached his fiduciary duty.
2. A public officer or a state employee shall not:
 - a. Engage in a substantial financial transaction for his private business purposes with a person whom he inspects, regulates, or supervises in the course of his official duties;
 - b. Assist any person for a fee or other compensation in obtaining any contract, claim, license, or other economic benefit from his agency;

c. Assist any person for a contingent fee in obtaining any contract, claim, license, or other economic benefit from any state agency, or

d. Perform an official act directly and substantially affecting to its economic benefit a business or other undertaking in which he either has a substantial financial interest or is engaged as counsel, consultant, representative, or agent.

3. A head of a principal department or a member of a quasi-judicial or rule-making agency may perform an official act notwithstanding paragraph (d) of subsection (2) of this section if his participation is necessary to the administration of a statute and if he complies with the voluntary disclosure procedures under CRS section 24-18-110.

4. Paragraph I of subsection (2) of this section does not apply to a member of a board, commission, council, or committee if he complies with the voluntary disclosure procedures under CRS 24-18-110 and if he is not a full-time state employee. Reference CRS 24-18-108.

35. TAXES:

Colorado Mesa University, as purchaser, is exempt from all federal excise taxes under Chapter 32 of the Internal Revenue Code Registration No. 84-6000546 and from all state government use taxes (Ref. Colorado Revised Statutes Chapter 39-26.114(a)). Our Colorado State Sales Tax Exemption Number is 98-03693. Seller is hereby notified that when materials are purchased in certain political subdivisions the seller may be required to pay sales tax even though the ultimate product or service is provided to the State of Colorado. This sales tax will not be reimbursed by the State.

36. ASSIGNMENT AND DELEGATION:

Except for assignment of antitrust claims, neither party to any resulting contract may assign or delegate any portion of the agreement without the prior written consent of the other party.

37. AVAILABILITY OF FUNDS:

Financial obligations of the State payable after the current fiscal year are contingent upon funds for that purpose being appropriated, budgeted and otherwise made available. In the event funds are not appropriated, any resulting contract will become null and void, without penalty to Colorado Mesa University and the State of Colorado.

38. BID BONDS/SECURITY:

If the RFP so states, a bid security in an amount equal to 5% of your proposal shall be furnished if your proposal exceeds \$50,000. If the specifications so state, it may be required for projects of less than \$50,000. Not required for this Solicitation.

39. CONTRACTOR'S PERFORMANCE BOND:

Not required for this Solicitation.

40. STANDARD INSURANCE REQUIREMENTS:

- A) The Offeror shall obtain, and maintain at all times during the term of this contract, insurance in the following kinds and amounts:
- 1) Workers' Compensation Insurance as required by state statute, and Employer's Liability Insurance covering all of offeror's employees acting within the course and scope of their employment.
 - 2) Commercial General Liability Insurance written on ISO occurrence form CG 00 01 10/93 or equivalent, covering premises operations, fire damage, independent offerors, products and completed operations, blanket contractual liability, personal injury, and advertising liability with minimum limits as follows
 - a) \$1,000,000 each occurrence;
 - b) \$2,000,000 general aggregate;
 - c) \$2,000,000 products and completed operations aggregate; and
 - d) \$50,000 any one fire.
 - 3) Automobile Liability Insurance covering any auto (including owned, hired and non-owned autos) with a minimum limit as follows: \$1,000,000 each accident combined single limit.
- B) Colorado Mesa University shall be named as additional insured on the Commercial General Liability and Automobile Liability Insurance policies (leases and construction contracts will require the additional insured coverage for completed operations on endorsements CG 2010 11/85, CG 2037, or equivalent). Coverage required of the contract will be primary over any insurance or self-insurance program carried by the University.
- C) The Insurance shall include provisions preventing cancellation or non-renewal without at least 30 days prior notice to the University.
- D) The offeror will require all insurance policies in any way related to the contract and secured and maintained by the offeror to include clauses stating that each carrier will waive all rights of recovery, under subrogation or otherwise, against the University, its agencies, institutions, organizations, officers, agents, employees and volunteers.
- E) All policies evidencing the insurance coverages required hereunder shall be issued by insurance companies satisfactory to the University.
- F) The offeror shall provide certificates showing insurance coverage required by this contract to the University within 7 business days of the effective date of the contract, but in no event later than the commencement of the services or delivery of the goods under the contract. No later than 15 days prior to the expiration date of any such coverage, the offeror shall deliver the State certificates of insurance evidencing renewals thereof. At any time during the term of this contract, the University may request in writing, and the offeror shall thereupon within 10 days supply to the University, evidence satisfactory to the University of compliance with the provisions of this section.
- G) Notwithstanding subsection A of this section, if the offeror is a "public entity" within the meaning of the Colorado Governmental Immunity Act CRS 24-10-101, et seq., as amended ("Act"), the offeror shall at all times during the term of this contract maintain only such liability insurance, by commercial policy or self-insurance, as is necessary to meet its liabilities under the Act. Upon request by the University, the contractor shall show proof of such insurance satisfactory to the University

41. INDEPENDENT CONTRACTOR CLAUSE:

All personal service contracts must contain the following clause:

“THE CONTRACTOR SHALL PERFORM ITS DUTIES HEREUNDER AS AN INDEPENDENT CONTRACTOR AND NOT AS AN EMPLOYEE. NEITHER THE CONTRACTOR NOR ANY AGENT OR EMPLOYEE OF THE CONTRACTOR SHALL BE OR SHALL BE DEEMED TO BE AN AGENT OR EMPLOYEE OF THE STATE. CONTRACTOR SHALL PAY WHEN DUE ALL REQUIRED EMPLOYMENT TAXES AND INCOME TAX WITHHOLDING, SHALL PROVIDE AND KEEP IN FORCE WORKER’S COMPENSATION (AND SHOW PROOF OF SUCH INSURANCE) AND UNEMPLOYMENT COMPENSATION INSURANCE IN THE AMOUNTS REQUIRED BY LAW, AND SHALL BE SOLELY RESPONSIBLE FOR THE ACTS OF THE CONTRACTOR, ITS EMPLOYEES AND AGENTS.”

42. INDEMNIFICATION:

To the extent authorized by law, the contractor shall indemnify, save and hold harmless the University, its employees and agents, against any and all claims, damages, liability and court awards including costs, expenses, and attorney fees incurred as a result of any act or omission by the contractor or its employees, agents, subcontractors, or assignees pursuant to the terms of the contract resulting from this RFP.

43. VENUE:

The laws of the State of Colorado, U.S.A. shall govern in connection with the formation, performance and the legal enforcement of any resulting contract. Further, Title 24, C.R.S. as amended, Article 101 through 112 and Rules adopted to implement the statutes govern this procurement.

SECTION 2: BACKGROUND, OVERVIEW AND GOALS

I. INTRODUCTION

Colorado Mesa University (CMU) is seeking a partner(s) who will contribute both strategically and tactically to the CMU marketing, communication and public relations efforts, be part of accelerating our growth, increasing enrollment, refreshing our brand and style guide, and creating significant brand differentiation creatively by using potentially unconventional strategies towards success. Innovation, collaboration and a willingness to think beyond the status quo is important. CMU seeks to be what the institution calls a “human scale university” driven by its first principle values and seeks a partner who will relentlessly pursue the vision while demonstrating innovative, high-quality work on a daily basis <https://www.coloradomesa.edu/strategic-plan/index.html>

CMU also believes that the university’s brand (“The Maverick”) contains unrealized, intrinsic brand potential and seeks a partner who can help clearly define and bring to life what it means to be a CMU Maverick and how that brand identification can help create differentiation in the higher education marketplace.

II. BACKGROUND

CMU is a comprehensive regional public higher education institution that provides exceptional educational opportunities on a state-of-the-art campus, including liberal arts, professional and technical programs at the doctoral, master's, bachelor's, associate and certificate levels. also has numerous fully online degree programs.

CMU serves as a primary intellectual, cultural, and economic center of western Colorado and promotes the exchange of ideas that are of regional, national and international importance. Founded in 1925, it is a dynamic university enrolling nearly 10,000 students. CMU also serves local school districts and high schools with a robust concurrent enrollment program. As western Colorado’s largest university, CMU serves a 14-county region and operates three campuses. The Main and Bishop campuses are located in Grand Junction, Colorado, with the third campus located in Montrose, Colorado. CMU has strong local government partnerships throughout the region. The university has residential capacity for 2,650 students.

In 2011, CMU completed a multi-year rebranding effort, which included implementing a name change — from Mesa State College to Colorado Mesa University. Since that time CMU has successfully transitioned to offering a full and robust university experience adding a full breadth of programs, student services, infrastructure and facilities. CMU has a long history of success and was ranked by the *Chronicle for Higher Education* as the fifth fastest growing baccalaureate institution in the U.S. from 2006-2016. Additional information can be found at coloradomesa.edu/about/facts and in the CMU by the Numbers at coloradomesa.edu/marketing/brand-strategy/editorial-style-guide and detailed enrollment data at coloradomesa.edu/institutional-research/student-profiles/index.

CMU has embarked on a Forming the Future Initiative that will result in a 2023 strategic plan. This initiative has established several “first principle” values as the foundation for the plan. The values are love, dignity, courage, humility, resiliency, curiosity and power. These values form the basis of a strategy to provide an integrative and experiential approach to higher education that empowers students to think differently and critically. CMU brings students together with expert scholars and thinkers from different disciplines to make connections between ideas and gain the skills to solve the unstructured, complex problems they will encounter in life.

With a low student-to-faculty ratio (which is especially important for the nearly 50% of first-generation students that attend) students have an opportunity to build one-on-one relationships with professors dedicated to providing knowledge and tools to succeed in today's interconnected world. An education at CMU offers value through 119 majors at the certificate, associate, baccalaureate, master's and doctoral level with 75 areas of concentration or emphasis and 52 minors delivered through 13 academic departments.

Dedication to providing the highest quality education in a student-centered environment guide the university. Learn more about CMU's existing brand platform at coloradomesa.edu/marketing/brand-strategy/brand-platform.

In addition to the core teaching mission, CMU is also the entertainment and cultural hub of western Colorado:

Athletics: Maverick student-athletes play a role in the growth of CMU and are an integral part of the university experience. CMU has 26 NCAA Division II teams and 2 additional varsity teams comprised of 700+ total varsity student-athletes. We have a strong winning tradition as a member of the NCAA and Rocky Mountain Athletic Conference (RMAC).

Performing Arts: The Moss Performing Arts Center serves as the regional hub for arts and entertainment and houses two of CMU's academic departments — music and theatre arts. The Center is home to the 620-seat Robinson Theater, a 290-seat recital hall, and the multi-purpose/150-seat Mesa Experimental Theatre (MET). In connection with its core mission of training more than 200 students majoring in the performing arts, CMU's Departments of Music and Theatre Arts produce more than 70 events each year. The University is investing in a new theater space featured here; <https://www.coloradomesa.edu/setting-the-stage/index.html>

Student Life: CMU offers more than 120 student clubs and organization spanning all interests including academic, athletic, cultures, professional associations, and honor societies. These complement learning via academic instruction and create a valuable student experience. Additionally, the Student Life Office produces numerous large-scale activities throughout the academic year.

Learn more at coloradomesa.edu/marketing/brand-strategy/editorial-style-guide and click on "CMU By the Numbers".

III. PURPOSE OF REQUEST

This solicitation's objective is to:

- 1) Identify a partner(s) who will contribute both strategically and tactically to CMU's annual marketing campaigns and be part of accelerating our growth. CMU will award a contract with an initial term of 1 (one) year with up to 4 (four) annual renewals at the discretion of the University. Award may be made to one or multiple firms that can meet the objectives and timeline indicated in this solicitation.

A sample scope of work for a planned initiative is included in this RFP..

The selected contractor(s) will work with the Marketing & Communications Office, the Admissions Office and university leadership to achieve the university's goals for enrollment growth, increasing the profile of the university through brand awareness and perception, creating a campus of respect and inclusion and implementing the strategic plan.

The contractor(s) must have a successful record of assisting organizations achieve their goals through innovative, leading-edge marketing and communication activities. CMU is looking for strategic partners that are sophisticated, highly integrated and engaged with strong subject matter expertise, creative and media capabilities, and a proven, results-oriented background in branding and acquisition marketing both online and offline.

It is essential that the selected firm(s) understand the framework within which CMU works. The successful firm will have an appreciation for the constraints of CMU's primarily rural communities in the 14-county service area, differing attitudes and demographics on the Front Range of Colorado and other areas of Colorado from which CMU recruits students, as well as piloting a key out-of-state campaign with potential to expand to other key Out Of State (OOS) markets. Key OOS markets for CMU include Alaska, California, Hawaii, Nevada, Oregon, Washington, Minnesota, Wisconsin, Illinois, and Texas.

It is also critical that firm(s) understand CMU's unique structure, as one of the few universities in the country — and the only in Colorado — to have a two-year community college division. CMU also has a campus in Montrose, Colorado, which offers programs primarily at the associate and certificate levels.

In the past, CMU has contracted for services and projects of varying scope from market research, to advertising campaigns targeting traditional undergraduate students, to local campaigns targeting adult students, to campaigns focused on positioning and enrollment at the community college, to web design/development. On an annual basis, CMU invests an average of \$1.2 million in advertising and creative services primarily aimed at recruiting traditional undergraduate students from across Colorado as well as local adult students.

The successful agency will need to have the resources to assist CMU starting in January 2023 so CMU can continue seamless, high-quality service to our students.

SECTION 3: STATEMENT OF WORK

Proposals shall focus on any or all facets of the scope based on the firm's capabilities and areas of particular expertise. For the purposes of this RFP, CMU is allotting \$1.2 million to focus on recruitment, admissions and enrollment of CMU and WCCC students.

CMU AND WCCC Annual CAMPAIGNS

I. BACKGROUND

CMU markets its baccalaureate programs under the CMU brand and most associate and certificate (career/technical education programs) through the community college division. The following site is very helpful for respondents to gain an understanding of the programs offered. <https://www.coloradomesa.edu/academics/program-search.html>

- Searching for programs only at the Bishop Campus will provide those programs offered by the Western Colorado Community College division of CMU.
- Searching programs by level enables you to see programs offered at the certificate, associate, bachelor's, master's or doctorate levels.
- CMU's brand manifesto and platform are posted at <https://www.coloradomesa.edu/marketing/brand-strategy/brand-platform>
- Content on our online content hub <https://www.coloradomesa.edu/now/> will provide firms with a general understanding of CMU and content on our YouTube channels <https://www.youtube.com/user/ColoradoMesaU> and <https://www.youtube.com/channel/UChgD2elPd4lvYcSL7an1aXQ> (WCCC) will provide you with other video assets and promotional approaches that have been produced.
- Colorado Mesa University (@coloradomesau) is active on Instagram, Facebook, TikTok, Twitter, LinkedIn, Snapchat and other relevant media platforms that are integrated into all CMU marketing and communications efforts.

II. GOALS

Campaigns will:

- 1) Drive enrollment conversion as a primary objective with lead generation and applications for admission for fall 2024 with spring 2024 as a secondary focus.
 - a. Generate leads in Customer Relationship Management (CRM) system via online inquiry, registration to attend a visitation events, or application among high school seniors, juniors and sophomores
- 2) Complement e-mail, text, and other outreach activities that increase conversation of applications and leads to enrolled students Improve ability to segment and target audiences through occasion based and opportunistic marketing and communication strategies.

- 3) Improve awareness and perception among high school students and service area adult students and their influencers including parents and counselors.
- 4) Work with public relations, athletics, performing arts, e-commerce and licensing agency and other brand extensions to gather data; engage cross promotions and deliver recruitment and admissions initiatives throughout campus occasions

III. TARGET AUDIENCES

CMU Traditional Undergraduate:

- 1) Young adults/post-secondary education intenders age 16-20 living in Colorado. Tier I priority counties include Mesa, Montrose, Delta and Garfield, Tier II priority counties include Jefferson, Douglas, Arapahoe and Eagle. Tier III other counties: Adams, Boulder, Broomfield, Denver, El Paso, Elbert, Larimer, and Pueblo. High schools within these counties will be provided to selected vendor(s) to offer more targeted placement of media/outreach.
- 2) Young adults/post-secondary education intenders age 16-20 living in select ZIP codes within AK, CA, TX, OR, WA, HI, NV, IL, MN, WI. ZIPs will be provided to selected firm(s) to provide more targeted media/outreach.
- 3) Influencers of primary target(s) including parents, supporters and high school counselors
- 4) Young adults and post-secondary education intenders age 16-20 and influencers living in other CO counties not in primary target.

CMU Adult:

- 1) Adult (non-traditional) post-secondary education intenders age 25-36 living in Mesa, Delta, Montrose and Garfield counties.

WCCC:

- 1) Young adults age 16-20 living in Colorado counties: Mesa, Delta Montrose and Garfield
- 2) Post-secondary education intenders age 25-39 in Mesa, Delta Montrose and Garfield

IV. BUDGET

Annual budget is based on CMU's Fiscal Year July 1, 2023 to June 30, 2024. \$1.2 million allocated is inclusive of all agency fees, creative services, production costs and working media paid at net rate. Working media will be allocated generally as follows: 80% to CMU and 20% to WCCC. The University intends to onboard the selected firm January 2023-June 2023 prior to commencement of the annual campaign.

V. SCOPE OF WORK AND TIMELINE

The following scope of work is supplied to aid vendors in understanding the pricing component. The actual campaign assets required may change following discovery, campaign development and media strategy discussions with contracted agency.

Primary goals are:

- Generate enrolled students (suspects, applicants or prospects to applied and enrolled) as well as leads through request for information, visits and applications for fall 2024
- Improve and elevated brand awareness and perception

Account Support for CMU and Community College Campaigns — Onboarding, Strategizing, Planning and Creative Development February 2023- June 2023

Implement and Run Campaigns July 2023 to June 2024

Forming the Future (“strategic planning”), creative development, weekly meetings (when creative is in development and/or media is in market), presentations and ongoing accounting and auditing of all campaign creative and media expenses accrued on behalf of CMU and Community College.

Discovery and Messaging and Creative Brief for CMU — February 2023

Forming the Future planning session with CMU leadership to align on goals and brand strategy. Development of a messaging and creative brief to guide the expression of the brand strategy, including content priorities, creative mandates and design guardrails. The creative brief will be used as a guide to ground and inspire market-facing messaging and activation of the campaign.

Brand Review and Enhancement Recommendation Report — February/March 2023

Project with Marketing and Communications Department for review of existing brand and style guides, manifest and other foundational documents that inform the CMU and community college brand

Competitor Analysis — February/March 2023

Provide competitor analysis on both creative assets and media spend to determine CMU’s current share of voice. CMU’s direct competitors include University of Colorado, University of Colorado-Colorado Springs, Colorado State University, University of Northern Colorado, University of Colorado Denver and Metro State University Denver. CMU’s indirect competitors include Fort Lewis College, Western Colorado University, Colorado State University Pueblo and Adams State College

Campaign Concept Development for CMU — March-June 2023

Presentation of three (3) creative concepts to bring the brand strategy to life for selection of one (1) campaign concept for refinement. Concepts will be provided in the form of ad-like objects bolstering the revitalized brand strategy with market-facing imagery and graphic styling as well as messaging tonality.

Media Strategy and Management for CMU — May 2023-June 2023

Includes development of media strategy, planning, purchasing, placement and tracking of assets, media billing and reconciliation, monthly media reports and media team participation in strategy/planning and ongoing status calls as needed.

Public Relations Strategy to Complement Campaigns Ongoing

Collaborate with Marketing and Communications to integrate timing of community and public occasions as well as campus events and merchandising effort with campaign strategy

NOTE: CMU is media agnostic but firmly believes that paid investments should be tailored to the target audience with maximum segmentation for distinct audience and demographics. Proposals should include any tactics you recommend, and for each you must include relevant samples for CMU's campaign. Reference item 16 above in the Administrative Information section regarding confidential or proprietary information in proposals Confidential/proprietary information must be readily identified, marked and separately packaged from the rest of the proposal. These may include tactics noted below and others proposed.

Creative Assets Production for CMU — March-June 2023

Based on approved creative concept and media plan, production of assets by agency, which may include and is not limited to the following. Vendors are encouraged to propose unique, creative and genuinely differentiated approaches to reaching goals.

- Video/Television: :15, :30, :60 or long-form spots for OTT, CTV, broadcast, cable, online, etc.
- Audio: :15, :30 or :60 audio spots for digital, broadcast, satellite radio
- Online Display: Static and/or animated banners for programmatic advertising
- Paid Social: Copy, images, animation or video for Facebook, Instagram, Twitter, Snapchat, TikTok, and other platforms
- Search Engine Marketing: Keywords and associated text for Google, Bing, Yahoo PPC advertising.
- OOH: Static or digital bulletins, transit ads, high school lightboards, etc.
- Print: Master ads developed to resize for print insertions throughout the year
- Collateral/Direct Mail: Mock-ups translating campaign into direct mail, etc.
- Guerilla: One-off tactics to excite and engage

Campaign Launch & Working Media for CMU —July 2023-June 2024

CMU is open to a phased approach to media. Working budget for media purchasing based on approved media plan. Vendor is responsible for negotiation, purchasing, placement, tracking and payment to all media vendors. The university does not pre-pay for media other than escrow funds needed for SEM and social. Media billing is paid net 30 following vendor and CMU audit of affidavits, back-up.

Discovery and Messaging and Creative Brief for Community College — February 2023

Strategic planning session with community college leadership to align on goals and brand strategy. Development of a messaging and creative brief to guide the

expression of the brand strategy, including content priorities, creative mandates and design guardrails. The creative brief will be used as a guide to ground and inspire market-facing messaging and campaign activation.

Campaign Concept Development for WCCC — March 2023

Presentation of three (3) creative concepts to bring the brand strategy to life for selection of one (1) campaign concept for refinement. Concepts will be provided in the form of ad-like objects bolstering the revitalized brand strategy with market-facing imagery and graphic styling as well as messaging tonality.

Creative Assets Production for WCCC — April 2023-June 2023

Based on approved creative concept and media plan, production of assets by agency, which may include but is not limited to the following:

- See tactical examples noted above for CMU.

Media Strategy and Management for WCCC — May 2023-June 2023

Includes development of media strategy, planning, purchasing, placement and tracking of assets, media billing and reconciliation, monthly media reports that include active adaptation and media team participation in strategy/planning and ongoing status calls as needed.

Campaign Launch & Working Media for WCCC — July 2023-June 2024

Working budget for media purchasing based on approved media plan. Vendor is responsible for negotiation, purchasing, placement, tracking and payment to all media vendors. The university does not pre-pay for media other than escrow funds needed for SEM and social. Media billing is paid net 30 following vendor and CMU audit of affidavits, back-up.

SECTION 4: OFFEROR’S RESPONSE FORMAT

All proposals must be submitted in the order set forth below to assist in the review process.

1. **Title Page.** Identify the RFP, the Contractor’s information, and certification that the person submitting the proposal has authority to enter into a contract with CMU if successful. The Vendor Signature Page must bear the signature of the authorized person.
2. **Executive Summary.** A short summary describing experience, qualifications, and commitment to the work requested in this RFP. Ensure that the minimum required qualifications are included.
3. **Firm Profile, CMU Team and Qualifications.** Complete Attachment A response sheet, provide a description of qualifications including relevant experience, education, licenses, insurance, and any other information pertaining to Contractor’s ability to perform the services. Provide a description of your firm’s relevant qualifications to perform the requested and offered services. Include the primary business focus or specialty and firm’s industry experience in higher education. While experience in higher education is

preferred agencies that also have consumer, B2B and e-commerce experience are acceptable..

Provide an organizational chart showing the management structure of the firm with a description of the qualifications, credentials and the location of upper-level management and **specifically identify the team members to be assigned and dedicated to managing CMU's account**. Firms should provide a brief, but informative resume or curriculum vitae for the person(s) proposed to be assigned under this contract. Provide a list of other key staff members who may be assigned to the University's account with a brief summary/description of qualifications.

- 4. Firm's Scope of Services, Key Accounts and Readiness.** Complete Attachment A and describe your experience and provide specific examples illustrating your capabilities. Specifically identify techniques and approaches which you would recommend and/or which the firm may specialize in. Specifically describe and showcase through examples your experience and success stories.
- a. Describe experience driving the development of an integrated branding and/or direct response campaign strategy in support of a growth objective.
 - b. Describe your experience assisting with developing marketing research and business plans that identify and target various consumer and business segments and result in integrated communications across multiple channels. If applicable, describe technologies and resources used to identify, recommend, track, measure, analyze and optimize marketing plans, advertising copy and media placements.
 - c. Clearly demonstrate skills for developing innovative messaging and media placement strategies.
 - d. Provide samples of materials produced for clients within the last three years and include performance metrics that prove the activity was successful. If applicable, please describe technologies and resources used to identify, recommend, place, track, measure, analyze and optimize media placements. Clearly demonstrate skills for developing innovative media placement strategies. Describe the firm's capability to negotiate media opportunities and rates, secure special placement, and gain value-added opportunities for cost-effective placement. Provide samples of metrics reports which you believe represent best practices Describe your relationship or partnership with any technology or capability providers that could enhance CMU's advertising promotions.

In addition, CMU is also interested in other marketing services proposers can provide, particularly innovative ideas to control costs, drive growth, and/or increase efficiency. Recommendations for how to best utilize agencies for the broad range of marketing services identified here, and how to develop and implement best practices can be offered.

Selected firm(s) will be asked to quickly respond to emerging needs and stand-up marketing activities on behalf of CMU/WCCC with limited notice. It is important for the University to understand each firm's ability to accept new work, if there is any backlog of projects limiting the principles and staff assigned to CMU from expeditiously respond projects. Indicate any former or current clients in the education sector.

- 5. References:** Provide 3 (three) client names, addresses, contact persons and telephone numbers including area code and extension of contact person; a brief, informative

description of the marketing effort provided including the specific services provided; the term of the contract (start date and completion date); if ongoing, indicate in the response.

- 6. Price Proposal.** Firms will provide a cost estimate to perform the services based on the Scope of Work in Section 3, including hourly rate(s), overhead costs, reimbursable expenses, charges, etc. Media buys placed on the University's behalf will be reimbursed at the net rate; CMU does not pay a mark-up or commission on media or outsourced services.

Please separate agency fees from production fees.

Agency Fees: Time incurred and billable to CMU for creative development, media planning and media buying. Show the estimated time investment by individual agency staff (account executive, principals, creative lead, other agency staff, and/or third-party vendors) and hourly rates for each.

Production Costs: Additionally, for each component Offeror should indicate associated production costs to be incurred by the agency and ultimately reimbursed to the agency as part of our annual agreement. These are the hard costs to develop creative assets and are paid to third-party vendors at net, with no markup. CMU will reimburse the vendor for the actual cost of outsourced or third-party services.

Pricing shall reflect the hourly rates and traveling expenses for those working on the University's account. Pricing proposals shall structure fees according to the working titles in your firm. **Innovative pricing that relates compensation to objective performance measurements is encouraged. Performance contracting related to increased conversion and enrollment will be considered.**

Specify the flat fee or hourly rates to be charged for:

- account management;
- consultation;
- creative;
- media strategy, planning, buying, tracking and analytics based on agreed KPI. (Indicate hourly rate for these services. Media buys placed on the University's behalf will be reimbursed at the net rate; CMU does not pay a mark-up or commission on media or outsourced services.)

- 7. Spec plan and creative examples** to illustrate offeror's creativity and ingenuity and reaching target audience and achieving campaign goals.
- 8. Additional Materials.** Include additional materials as appendices if necessary and relevant to the proposal.

CMU may request clarification or additional information during the evaluation process.

SECTION 5: EVALUATION PROCESS & CRITERIA

- A. Evaluation Process for Annual Campaign
All proposals submitted in response to this RFP will be reviewed for responsiveness prior to referral to the evaluation committee. Each response will be scored by each member of the

Evaluation Committee in each of the following areas outlined in Section 4, Offeror's Response Format and each area will be rated on a scale from 1-10 with 10 being the highest rating and 1 being the lowest rating:

B. Evaluation Criteria for Annual Campaign

1. Overall proposal and creativity	25%
2. Experience and qualifications of firm and team assigned to CMU	25%
3. Scope of services	25%
4. Cost	15%
5. References	5%
6. Proposed performance contracting concepts	5%

While a numerical rating system may be used to assist the evaluation committee in selecting the competitive range (if necessary) and making the award decision, the award decision ultimately is a business judgment that will reflect an integrated assessment of the relative merits of the proposals using the factors and any relative weights if established.

Basis of Award

The technical factors will be assessed based on the soundness of the Offeror's approach and understanding of the requirements. The experience and/or demonstrated capabilities factor will be assessed by considering the extent to which the qualifications, experience, and past performance are likely to foster successful, on-time performance. Assessments include a judgment concerning the potential risk of unsuccessful or untimely performance and the anticipated amount of University involvement necessary to ensure timely, successful performance. The selection is ultimately a business judgment that will reflect an integrated assessment of the relative merits of proposals using the factors identified above. The University reserves the right to reject any (or all) proposal(s) that pose in the judgment of the University, unacceptable risks of unsuccessful or untimely performance, unacceptable University resource requirements, or costs exceeding the budget constraints.

Failure of the Offeror to provide any information requested in the RFP may result in disqualification of the proposal and shall be the responsibility of the Offeror.

SECTION 6: REQUIRED SUBMITTALS

Offerors must include

- Vendor Signature Form
- All items required in the body of the RFP
- Attachment A Response Form

VENDOR SIGNATURE FORM
CMU-22-2745
Marketing Services 2023

Proposals Due: December 5, 2022

Time: 11:00 am MST

Bids will be accepted electronically through the Rocky Mountain ePurchasing [RMEPS] website <https://www.bidnetdirect.com/colorado> The Rocky Mountain ePurchasing site offers both free and paid registration options that allow for full access of the solicitation documents and for electronic submission of proposals. [Note: Free registration on the site may take up to 24 hours to process; plan registration to allow time for on-time bid submission.] Colorado Mesa University does not have access or control of the vendor side of the RMEPS site, contact RMEPS directly to resolve any issues encountered prior to response deadline (800) 835-4603 The Offeror herein noted has carefully examined all components, instructions and requirements of this RFP and proposes to furnish the services described herein. The undersigned hereby agrees to provide Marketing Services on behalf of Colorado Mesa University in accordance with the specifications, requirements, terms and conditions contained herein for the rates quoted. The undersigned certifies that all representations, certifications and statements within its proposal are true and accurate as of the date of the proposal submission. The person signing this Vendor Signature Form certifies that they are a duly authorized officer for the Offeror, and that the information and any materials enclosed with this proposal represent the capability of the company to provide the services described in the quote.

This Vendor Signature Form page **MUST** be signed for proposal to be valid.

COMPLETE THE FOLLOWING:

Federal Employer ID No. _____ Date: _____

Company Name: _____

Authorized Signature: _____

Typed/Printed Name: _____

Title: _____

Address: _____

City/State/Zip: _____

Phone No.: _____

Contact for Clarifications:

Name: _____

Title: _____

Phone No.: _____

Email: _____

Offeror Acknowledges Receipt of Addendum No. _____, _____, _____, _____ (Addendums **MUST** be acknowledged)