



Request for Proposal #: RFP 64-778

Marketing and Communications Consultant for the NC Center for Health & Wellness (NCCHW) at UNC Asheville (UNCA)

Schedule of Events:

Event	Responsibility	Date and Time
Issue RFP	State	August 16, 2021
Submit Written Questions	Vendor	August 26, 2021 by 5:00 p.m.
Provide Response to Questions	State	August 31, 2021 by 5:00 p.m.
Deadline to Submit Proposals	Vendor	September 7, 2021 by 5:00 p.m.
Intended Contract Award	State	September 24, 2021
Funding Expenditure Deadline	State	June 30, 2022

Direct all inquiries concerning this RFP to: Mark Westergaard, Purchasing Agent
mwesterg@unca.edu

Check list:

Execution page completed & signed	
Evaluation criteria in Section 3.4 noted	
All items listed in 2.7 Proposal Contents included in response	
Requirements in Section 4 met	

ABOUT UNCA AND NCCHW

UNCA is the designated undergraduate liberal arts university in the 17 campus UNC system. An outstanding learning community, UNC Asheville is committed to providing an excellent liberal arts experience for its (approx.) 3,800 undergraduate students through challenging academic programs, exemplary teaching, and meaningful and diverse co-curricular activities. NCCHW is housed at UNCA and works to impact policy, build capacity, and ignite community initiatives by working through a web of cross-sector relationships organized around building healthier places throughout the state. The two initiatives at the core of our organization include NCCHW's Culture of Results (COR) empowerment evaluation training and technical assistance program and Healthy Aging NC (HANC), which

provides statewide training, data reporting, and management, and technical assistance for evidence-based health programs. Our work collectively improves health outcomes for historically marginalized populations statewide and builds systems to support the inclusivity and decision-making abilities of these underserved populations long term.

All times shown in this RFP are Eastern Standard Time unless otherwise noted.

STATE OF NORTH CAROLINA

Request for Proposal

RFP 64-778

For internal State agency processing, including tabulation of proposals in the Interactive Purchasing System (IPS), please provide your company's Federal Employer Identification Number or alternate identification number (e.g. Social Security Number). Pursuant to General Statute 132-1.10(b) this identification number shall not be released to the public. **This page will be removed and shredded, or otherwise kept confidential**, before the procurement file is made available for public inspection.

**This page is to be filled out and returned with your proposal.
Failure to do so may subject your proposal to rejection.**

ID Number:

Federal ID Number or Social Security Number

Vendor Name

Electronic responses ONLY will be accepted for this solicitation.

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Vendor: _____



**THE UNIVERSITY OF NORTH CAROLINA AT ASHEVILLE
REQUEST FOR PROPOSALS # 64-778
Marketing and Communications Consultant for the NC Center for
Health & Wellness (NCCHW) at UNC Asheville (UNCA)**

Refer *all* inquiries regarding this RFP to:
Mark Westergaard, Purchasing Agent
Email: mwesterg@unca.edu

Issue date: August 16, 2021
Deadline to respond to this RFP: September 7 at 5:00 p.m.

Contract Type: Open Market
Using Agency: UNC Asheville

EXECUTION

In compliance with this Request for Proposals, and subject to all the conditions herein, the undersigned Vendor offers and agrees to furnish and deliver any or all items upon which prices are bid, at the prices set opposite each item within the time specified herein. By executing this proposal, the undersigned Vendor certifies that this proposal is submitted competitively and without collusion (G.S. 143-54), that none of its officers, directors, or owners of an unincorporated business entity has been convicted of any violations of Chapter 78A of the General Statutes, the Securities Act of 1933, or the Securities Exchange Act of 1934 (G.S. 143-59.2), and that it is not an ineligible Vendor as set forth in G.S. 143-59.1. False certification is a Class I felony. Furthermore by executing this proposal, the undersigned certifies to the best of Vendor's knowledge and belief, that it and its principals are not presently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from covered transactions by any Federal or State department or agency. As required by G.S. §143-48.5, the undersigned Vendor certifies that it, and each of its sub-Contractors for any Contract awarded as a result of this RFP, complies with the requirements of Article 2 of Chapter 64 of the NC General Statutes, including the requirement for each employer with more than 25 employees in North Carolina to verify the work authorization of its employees through the federal E-Verify system. G.S. 133-32 and Executive Order 24 (2009) prohibit the offer to, or acceptance by, any State Employee associated with the preparing plans, specifications, estimates for public Contract; or awarding or administering public Contracts; or inspecting or supervising delivery of the public Contract of any gift from anyone with a Contract with the State, or from any person seeking to do business with the State. By execution of any response in this procurement, you attest, for your entire organization and its employees or agents, that you are not aware that any such gift has been offered, accepted, or promised by any employees of your organization.

***** Failure to complete entire form below prior to submittal shall render bid invalid and it WILL BE REJECTED. Late bids cannot be accepted. *****

VENDOR NAME: _____

STREET ADDRESS/PO BOX #: _____

CITY, STATE, ZIP CODE: _____

PHONE #: _____ FAX #: _____ EMAIL: _____

PRINCIPAL PLACE OF BUSINESS IF DIFFERENT FROM ABOVE: _____

PRINT NAME/TITLE OF PERSON SIGNING ON BEHALF OF VENDOR: _____

AUTHORIZED SIGNATURE*: _____ DATE: _____

Vendor: _____

Offer valid for at least 60 days from date of proposal opening, unless otherwise stated here: _____ days. After this time, any withdrawal of offer shall be made in writing, effective upon receipt by the agency issuing this RFP.

**If submitting an electronic response Vendor has two options: 1) Vendor may apply a wet signature, scan, and then upload this attestation page as an attachment for submission through NC BIDS; or 2) Vendor may apply a digital/electronic signature in the designated box, scan, and then upload as an attachment along with its proposal*

ACCEPTANCE OF PROPOSAL

If any or all parts of this proposal are accepted by the State of North Carolina, an authorized representative of UNC Asheville shall affix his/her signature hereto and this document and all provisions of this Request For Proposal along with the Vendor proposal response and the written results of any negotiations shall then constitute the written agreement between the parties. A copy of this acceptance will be forwarded to the successful Vendor(s).

FOR STATE USE ONLY: Offer accepted and Contract awarded this ____ day of _____, 20____, as indicated on the attached certification, by _____.

(Authorized Representative of UNC Asheville.

1.0 PURPOSE AND BACKGROUND

The North Carolina Center for Health & Wellness ([NCCHW](#)) at UNC Asheville ([UNCA](#)) works to impact policy, build capacity, and ignite community initiatives by working through a web of cross-sector relationships organized around building healthier places throughout the state. The two initiatives at the core of our organization include NCCHW's Culture of Results ([COR](#)) empowerment evaluation training and technical assistance program and Healthy Aging NC ([HANC](#)), which provides statewide training, data reporting and management, and technical assistance for evidence-based health programs. Our work collectively improves health outcomes for historically marginalized populations statewide and builds systems to support the inclusivity and decision-making abilities of these underserved populations long term.

NCCHW seeks qualified proposals from Marketing and Communications consultants. The purpose of this position is to support NCCHW in the design, development, organization, and implementation of all marketing and communications materials including but not limited to branding, social media, website, and e-newsletter messaging, updates, and planning. The goals of this position are to improve the consistency and quality of NCCHW's marketing and communications efforts and to develop a sustainable, long-term plan for NCCHW's team to implement beyond the length of contract. The consultant will be responsible for developing and implementing original marketing and communications materials in addition to helping the NCCHW team determine a plan that includes the person(s) responsible for each task, which materials to use, and when and how to use them in the future.

Proposals shall be submitted in accordance with the terms and conditions of this RFP and any addenda issued hereto.

2.0 RFP GENERAL INFORMATION

2.1 REQUEST FOR PROPOSAL DOCUMENT

The RFP is comprised of the base RFP document, any attachments, and any addenda released before Contract award. All attachments and addenda released for this RFP in advance of any Contract award are incorporated herein by reference.

2.2 RESERVED E-PROCUREMENT SOLICITATION

ATTENTION: This is NOT an E-Procurement solicitation. Paragraph #16 of Attachment B: North Carolina General Contract Terms and Conditions, paragraphs (b) and (c), do not apply to this solicitation.

The Terms and Conditions made part of this solicitation contain language necessary for North Carolina's Statewide E-Procurement Services. It is the Vendor's responsibility to read these terms and conditions carefully and to consider them in preparing its proposal. By execution of this RFP, Vendor agrees to and acknowledges acceptance of all terms and conditions, including those related to E-Procurement usage. General information on the E-Procurement Services can be found at: <http://eprocurement.nc.gov/>.

2.3 NOTICE TO VENDORS REGARDING RFP TERMS AND CONDITIONS

It shall be the Vendor's responsibility to read the Instructions, the State's terms and conditions, all relevant exhibits and attachments, and any other components made a part of this RFP, and comply with all requirements and specifications herein. Vendors also are responsible for obtaining and complying with all Addenda and other changes that may be issued in connection with this RFP.

If Vendors have questions, issues, or exceptions regarding any term, condition, or other component within this RFP, those must be submitted as questions in accordance with the instructions in Section 2.6 PROPOSAL QUESTIONS. **Questions must be emailed to mwesterg@unca.edu.** If the University determines that any changes will be made as a result of the points raised, then the University will communicate such changes in the form of an RFP addendum. The University may also elect to leave open the possibility for later negotiation of specific components of the Contract that have been addressed during the question and answer period. Other than through this process, the University rejects and will not be required to evaluate or consider any additional or modified terms and conditions submitted with Vendor's proposal. This applies to any language appearing in or attached to the document as part of the Vendor's proposal that purports to vary any terms and conditions or Vendors' instructions herein or to render the proposal non-binding or subject to further negotiation. **By execution and delivery of this**

Vendor: _____

RFP Response, the Vendor agrees that any additional or modified terms and conditions, whether submitted purposely or inadvertently, shall have no force or effect, and will be disregarded. Noncompliance with, or any attempt to alter or delete, this paragraph shall constitute sufficient grounds to reject Vendor's proposal as nonresponsive.

2.4 RFP SCHEDULE

The table below shows the *intended* schedule for this RFP. UNC Asheville will make every effort to adhere to this schedule. All times shown in this RFP are Eastern Standard Time unless otherwise noted.

Event	Responsibility	Date and Time
Issue RFP	State	August 16, 2021
Submit Written <u>Questions</u>	Vendor	August 26, 2021 by 5:00 p.m.
Provide Response to Questions	State	August 31, 2021 by 5:00 p.m.
Deadline to Submit Proposals	Vendor	September 7, 2021 by 5:00 p.m.
Intended Contract Award	State	September 24, 2021
Funding Expenditure Deadline	State	June 30, 2022

2.5 PROPOSAL QUESTIONS

Upon review of the RFP documents, Vendors may have questions to clarify or interpret the RFP in order to submit the best proposal possible. To accommodate the Proposal Questions process, Vendors shall submit any such questions by the above due date.

Vendor must email written questions to mwesterg@unca.edu by 5pm on August 26, 2021. Vendors should enter "RFP 64-778: Questions" in the subject line. Please include a reference to the applicable RFP section by indicating "SECTION #."

Questions received prior to the submission deadline date, UNC Asheville's response, and any additional terms deemed necessary by UNC Asheville will be posted in the form of an addendum to the Interactive Purchasing System (IPS), <http://www.ips.state.nc.us>, and shall become an Addendum to this RFP. No information, instruction or advice provided orally or informally by any State personnel, whether made in response to a question or otherwise in connection with this RFP, shall be considered authoritative or binding. Vendors shall rely *only* on written material contained in an Addendum to this RFP.

2.6 PROPOSAL SUBMITTAL

Responses to this RFP must be submitted by email to mwesterg@unca.edu. Submission shall include this RFP, as provided in section 2.8.

IMPORTANT NOTE: This is an absolute requirement. Vendor shall bear the risk for late submission due to unintended or unanticipated delay. It is the Vendor's sole responsibility to ensure its proposal has been submitted to this Office by the specified time and date of opening. The time and date of submission will be marked on each proposal when received. Any proposal-submitted after the proposal deadline will be rejected.

Failure to submit a proposal in strict accordance with these instructions shall constitute sufficient cause to reject a vendor's proposal(s).

Critical updated information may be included in Addenda to this RFP. It is important that all Vendors proposing on this RFP periodically check the State's IPS website for any Addenda that may be issued prior to the bid opening date. All Vendors shall be deemed to have read and understood all information in this RFP and all Addenda thereto.

Vendor: _____

Contact with anyone working for or with the State regarding this RFP other than the State Contract Lead named on the face page of this RFP in the manner specified by this RFP shall constitute grounds for rejection of said Vendor's offer, at the State's election.

2.7 PROPOSAL CONTENTS

Vendors shall populate all attachments of this RFP that require the Vendor to provide information and include an authorized signature where requested. Vendor RFP responses shall include the following items and those attachments should be arranged in the following order:

- a) Cover Letter
- b) Title Page: Include the company name, address, phone number and authorized representative along with the Proposal Number.
- c) Completed and signed version of EXECUTION PAGE, and signed receipt pages of any addenda released in conjunction with this RFP
- d) Vendor's proposal for completion of work described herein, in compliance with requirements herein
- e) Vendor's fees for completion of work described herein
- f) ATTACHMENT A: INSTRUCTIONS TO VENDORS
- g) ATTACHMENT B: NORTH CAROLINA GENERAL CONTRACT TERMS AND CONDITIONS
- h) Completed and signed version of ATTACHMENT C: LOCATION OF WORKERS UTILIZED BY VENDOR
- i) Completed and signed version of ATTACHMENT D: CERTIFICATION OF FINANCIAL CONDITION

2.9 DEFINITIONS, ACRONYMS, AND ABBREVIATIONS

- a) **BAFO:** Best and Final Offer, submitted by a vendor to alter its initial offer, made in response to a request by the issuing agency.
- b) **BUYER:** The employee of UNC Asheville or Other Eligible Entity that places an order with the Vendor.
- c) **CONTRACT LEAD:** Representative of UNC Asheville who corresponds with potential Vendors in order to identify and contract with that Vendor providing the greatest benefit to UNC Asheville and who will administer the contract for UNC Asheville.
- d) **LOT:** A grouping of similar products within this RFP.
- e) **NORTH CAROLINA CENTER FOR HEALTH & WELLNESS (NCCHW):** An Organization within UNC Asheville, focused on building healthier places throughout North Carolina.
- f) **QUALIFIED PROPOSAL:** A responsive proposal submitted by a responsible Vendor.
- g) **RFP:** Request for Proposal
- h) **STATE:** The State of North Carolina, including any of its sub-units recognized under North Carolina law.
- i) **STATE AGENCY:** Any of the more than 400 sub-units within the executive branch of the State, including its departments, boards, commissions of higher education and other institutions.
- j) **UNC ASHEVILLE:** The University of North Carolina at Asheville is one of 17 schools in the State University System. Also referred to herein as "The University" or "University".
- k) **VENDOR:** Supplier, contractor, bidder, proposer, company, firm, corporation, partnership, individual or other entity submitting a response to a Request for Proposal.

3.0 METHOD OF AWARD AND PROPOSAL EVALUATION PROCESS

3.1 METHOD OF AWARD

Contracts will be awarded in accordance with G.S. 143-52 and the evaluation criteria set out in this solicitation. Prospective Vendors shall not be discriminated against on the basis of any prohibited grounds as defined by Federal and State law.

All qualified proposals will be evaluated and awards will be made to the Vendor(s) meeting the RFP requirements and achieving the highest and best final evaluation, based on the criteria described below.

Vendor: _____

While the intent of this RFP is to award a Contract(s) to a single Vendor, UNC Asheville reserves the right to make separate awards to different Vendors for one or more line items, to not award one or more line items or to cancel this RFP in its entirety without awarding a Contract, if it is considered to be most advantageous to UNC Asheville to do so.

3.2 CONFIDENTIALITY AND PROHIBITED COMMUNICATIONS DURING EVALUATION

During the evaluation period—from the date proposals are opened through the date the contract is awarded—each Vendor submitting a proposal (including its representatives, sub-contractors and/or suppliers) is prohibited from having any communications with any person inside or outside the using agency, issuing agency, other government agency office, or body (including the purchaser named above, department secretary, agency head, members of the general assembly and/or governor's office), or private entity, if the communication refers to the content of Vendor's proposal or qualifications, the contents of another Vendor's proposal, another Vendor's qualifications or ability to perform the contract, and/or the transmittal of any other communication of information that could be reasonably considered to have the effect of directly or indirectly influencing the evaluation of proposals and/or the award of the contract. A Vendor not in compliance with this provision shall be disqualified from contract award, unless it is determined in UNC Asheville's discretion that the communication was harmless, that it was made without intent to influence and that the best interest of UNC Asheville would not be served by the disqualification. A Vendor's proposal may be disqualified if its subcontractor and supplier engage in any of the foregoing communications during the time that the procurement is active (i.e., the issuance date of the procurement to the date of contract award). Only those discussions, communications or transmittals of information authorized or initiated by the issuing agency for this RFP or general inquiries directed to the purchaser regarding requirements of the RFP (prior to proposal submission) or the status of the contract award (after submission) are excepted from this provision.

3.3 PROPOSAL EVALUATION PROCESS

UNC Asheville shall review all Vendor responses to this RFP to confirm that they meet the specifications and requirements of the RFP. UNC Asheville reserves the right to waive any minor informality or technicality in proposals received.

UNC Asheville will conduct a One-Step evaluation of Proposals:

- a) Proposals will be received from each responsive Vendor via email.
- b) All proposals must be received by the issuing agency not later than the date and time specified on the cover sheet of this RFP.
- c) At that date and time, the emails containing the proposals from each responding firm will be shared with the selection committee and the name of the Vendors and total costs offered will be considered. Interested parties are cautioned that these costs and their components are subject to further evaluation for completeness and correctness and therefore may not be an exact indicator of a Vendor's position.
- d) At their option, the evaluators may request oral presentations or discussion with any or all Vendors for the purpose of clarifying or amplifying the materials presented in any part of the proposal. Vendors are cautioned, however, that the evaluators are not required to request presentations or other clarification—and often do not; therefore, all proposals should be complete and reflect the most favorable terms available from the Vendor.
- e) Proposals will generally be evaluated according to completeness, content, and experience with similar projects, ability of the Vendor and its staff, and cost. Specific evaluation criteria are listed in 3.4 EVALUATION CRITERIA, below.
- f) Vendors are cautioned that this is a request for offers, not an offer or request to contract, and UNC Asheville reserves the unqualified right to reject any and all offers at any time if such rejection is deemed to be in the best interest of UNC Asheville.

UNC Asheville reserves the right to reject all original offers and request one or more of the Vendors submitting proposals within a competitive range to submit a best and final offer (BAFO), based on discussions and

Vendor: _____

negotiations with UNC Asheville, if the initial responses to the RFP have been evaluated and determined to be unsatisfactory.

Upon completion of the evaluation process, UNC Asheville will make Award(s) based on the evaluation and post the award(s) to IPS under the RFP number for this solicitation. Award of a Contract to one Vendor does not mean that the other proposals lacked merit, but that, all factors considered, the selected proposal was deemed most advantageous and represented the best value to UNC Asheville.

3.4 EVALUATION CRITERIA

A selection committee composed of four (4) NCCHW team members will review all submissions and references. Work samples may be requested. The proposals will be ranked and negotiations will be undertaken with the highest ranked proposal. Upon successful negotiation of terms, NCCHW will offer a contract to the company or individual. In the event that a mutual agreement cannot be reached, the next highest ranked vendor will be contacted and negotiations will be undertaken.

- a) As part of the process, vendors may be invited to attend a NCCHW team meeting to answer questions from the selection committee and other team members.
- b) This process will continue until the contract is awarded.
- c) NCCHW reserves the right to negotiate a purchase contract, including the scope of the consultant and price, with any respondent or other qualified party.
- d) NCCHW reserves the right to accept or reject any or all responses received as a result of this request, or to cancel this request in part or in its entirety if it is in the best interest of NCCHW.
- e) NCCHW may contact any vendor after receiving its submittal to seek clarification on any portion thereof.
- f) NCCHW reserves the right to request additional information from any vendor if NCCHW deems such information necessary to further evaluate the offering.

All qualified proposals will be evaluated and award made based on the following criteria considered, to result in an award most advantageous to UNC Asheville:

Proposals will be evaluated and scored based on the attached Evaluation Matrix in ATTACHMENT E.

Technical: 65 Maximum Points

Price: 5 Maximum Points: UNCA will evaluate the 5 highest and best technical proposals and rank them by price from lowest price (5 points) to highest price (1 point). Proposal pricing should not exceed \$12,000.

3.5 PERFORMANCE OUTSIDE THE UNITED STATES

Vendor shall complete ATTACHMENT D: LOCATION OF WORKERS UTILIZED BY VENDOR. In addition to any other evaluation criteria identified in this RFP, UNC Asheville may also consider, for purposes of evaluating proposed or actual contract performance outside of the United States, how that performance may affect the following factors to ensure that any award will be in the best interest of UNC Asheville:

- a) Total cost to UNC Asheville
- b) Level of quality provided by the Vendor
- c) Process and performance capability across multiple jurisdictions
- d) Protection of UNC Asheville's information and intellectual property
- e) Availability of pertinent skills
- f) Ability to understand UNC Asheville's business requirements and internal operational culture
- g) Particular risk factors such as the security of UNC Asheville's information technology
- h) Relations with citizens and employees
- i) Contract enforcement jurisdictional issues

3.6 INTERPRETATION OF TERMS AND PHRASES

This Request for Proposal serves two functions: (1) to advise potential Vendors of the parameters of the solution being sought by the University; and (2) to provide (together with other specified documents) the terms of the Contract resulting from this procurement. As such, all terms in the Request for Proposal shall be enforceable as contract terms in accordance with the General Terms and Conditions. The use of phrases such as "shall," "must," and "requirements" are intended to create enforceable contract conditions. In determining whether proposals should be evaluated or rejected, the University will take into consideration the degree to which Vendors have proposed or failed to propose solutions that will satisfy the University's needs as described in this Request for

Vendor: _____

Proposal. Except as specifically stated in the Request for Proposal, no one requirement shall automatically disqualify a Vendor from consideration. However, failure to comply with any single requirement may result in the University exercising its discretion to reject a proposal in its entirety.

4.0 REQUIREMENTS

This Section lists the requirements related to this RFP. By submitting a proposal the Vendor agrees to meet all stated requirements in this Section as well as any other specifications, requirements and terms and conditions stated in this RFP. If a Vendor is unclear about a requirement or specification or believes a change to a requirement would allow for UNC Asheville to receive a better proposal, the Vendor is urged and cautioned to submit these items in the form of a question during the question and answer period in accordance with Section 2.5.

4.1 CONTRACT TERM

The Contract shall have an initial term of 6 months, beginning on the date of contract award (the "Effective Date"). The Vendor shall begin work under the Contract within 15 business days of the Effective Date.

4.2 PRICING

Proposal price shall constitute the total cost to UNC Asheville for complete performance in accordance with the requirements and specifications herein, including all applicable charges handling, administrative and other similar fees. Vendor shall not invoice for any amounts not specifically allowed for in this RFP.

4.3 INVOICES

- a) The Vendor must submit invoices as defined by the terms of the contract. Electronic invoices must be sent to acctspayable@unca.edu, with a cc to vashley@unca.edu.
- b) Invoices should include, at a minimum: Vendor's Billing Address, Vendor's Federal ID Number, NC Vendor ID Number, Customer Account Number, NC Contract Number, Description of Services Rendered and/or Cost per Unit of Service.

4.4 PAYMENT TERMS

- a) The Vendor will be compensated as defined by the terms of the contract.
- b) The Vendor will be paid net within thirty 30 calendar days after the Vendor's invoice is approved by UNC Asheville

4.5 VENDOR EXPERIENCE

Responses to this RFP must include the following in its Proposal, Vendor shall document the following:

- a) At least 3 years' documented marketing and communications experience
- b) Demonstrated positive outcomes working with other organizations
- c) Documented education and expertise in the field of marketing and communications
- d) Experience with public and/or private sector clients with similar or greater size and complexity to NCCHW Asheville.

4.6 REFERENCES

Vendors shall provide at least three (3) references using **ATTACHMENT F: CUSTOMER REFERENCE FORM** for which Vendor has provided services of similar size and scope to that proposed herein. UNC Asheville may contact these users to determine the services provided are substantially similar in scope to those proposed herein and Vendor's performance has been satisfactory. Such information may be considered in the evaluation of the proposal.

4.7 BACKGROUND CHECKS

Any personnel or agent of the Vendor performing services under any contract arising from this RFP may be required to undergo a background check at the expense of the Vendor, if so requested by UNC Asheville.

Vendor: _____

4.8 PERSONNEL

Vendor shall not substitute key personnel assigned to the performance of this Contract without prior written approval by the Contract Lead. Vendor shall notify the Contract Lead of any desired substitution, including the name(s) and references of Vendor's recommended substitute personnel. UNC Asheville will approve or disapprove the requested substitution in a timely manner. UNC Asheville may, in its sole discretion, terminate the services of any person providing services under this Contract. Upon such termination, UNC Asheville may request acceptable substitute personnel or terminate the contract services provided by such personnel.

4.9 VENDOR'S REPRESENTATIONS

- a) Vendor warrants that qualified personnel shall provide services under this Contract in a professional manner. "Professional manner" means that the personnel performing the services will possess the skill and competence consistent with the prevailing business standards in the industry. Vendor agrees that it will not enter any agreement with a third party that may abridge any rights of UNC Asheville under this Contract. Vendor will serve as the prime contractor under this Contract and shall be responsible for the performance and payment of all subcontractor(s) that may be approved by UNC Asheville. Names of any third party vendors or subcontractors of Vendor may appear for purposes of convenience in Contract documents; and shall not limit Vendor's obligations hereunder. Vendor will retain executive representation for functional and technical expertise as needed in order to incorporate any work by third party subcontractor(s).
- b) If any services, deliverables, functions, or responsibilities not specifically described in this Contract are required for Vendor's proper performance, provision and delivery of the service and deliverables under this Contract, or are an inherent part of or necessary sub-task included within such service, they will be deemed to be implied by and included within the scope of the contract to the same extent and in the same manner as if specifically described in the contract. Unless otherwise expressly provided herein, Vendor will furnish all of its own necessary management, supervision, labor, facilities, furniture, computer and telecommunications equipment, software, supplies and materials necessary for the Vendor to provide and deliver the Services and Deliverables.
- c) Vendor warrants that it has the financial capacity to perform and to continue perform its obligations under the contract; that Vendor has no constructive or actual knowledge of an actual or potential legal proceeding being brought against Vendor that could materially adversely affect performance of this Contract; and that entering into this Contract is not prohibited by any contract, or order by any court of competent jurisdiction.

5.0 SCOPE OF WORK

5.1 DEFINED NEED

The ideal Marketing and Communications Consultant will be able to effectively address the majority of the needs briefly described below:

- a) Help NCCHW and our network of partners to clarify and enhance our key messages to better communicate and visualize who we are, what we do, and how we do it both internally and externally

Vendor: _____

- b) Upgrade NCCHW's multiple websites, social media accounts, scheduled e-newsletters, flyers, educational materials, and more to a clear, succinct, organized, visually appealing, templated, and branded system of communication.
- c) Develop consistently branded communication materials, and short- and long-term plans to implement them to sustain NCCHW's current strong partnerships and assist in developing new partnerships.

5.2 KEY QUESTIONS

NCCHW's marketing plan should answer the following questions:

- a) Who we are, what we do, and how we do it to make it clear to all internal and external partners across all websites, social media platforms, e-newsletters and other marketing channels?
- b) What gaps exist in our current marketing and communications materials and efforts and how can we sustainably fill those gaps long-term?
- c) Do our marketing and communications materials and channels effectively communicate to our various stakeholders and partners?
- d) How can we measure the outcomes of our outreach efforts both short- and long-term?

NCCHW would like the marketing and communications plan to include SMART (specific, measurable, attainable, realistic, and timely) goals for both the consultant and our team moving forward beyond the length of the contract.

5.3 STATEMENT OF QUALIFICATIONS REQUIREMENT

Respondents to this RFP must provide the following qualifications:

- a) Company or personal history and an overview of your experience in the field
- b) Response to the list of desired services (5.4 below)
- c) List of current organizations who are presently using your services and a list of organizations we can contact for a reference
- d) Capacity to provide marketing and communications services
- e) Cost structure and pricing (*including hourly rate, estimate of total hrs required*)
- f) Other pertinent information that may be important to help NCCHW make the best decision

5.4 DESIRED SERVICES

NCCHW Asheville wishes to engage consultant(s) who will develop and implement a marketing and communications plan that includes:

- a) Input on existing materials for [NCCHW](#) broadly and across NCCHW initiatives such as [Culture of Results](#), [Healthy Aging NC](#), and [NC Falls Prevention Coalition](#) and identifying needs for new materials
- b) Design, development, and organization of new materials
- c) Consistent branding across all NCCHW initiatives, preserving elements of public-facing branding while ensuring consistency with UNCA's requirements for branding
- d) Templated marketing materials for NCCHW's team and network of partners to adapt to different programs, initiatives, and needs
- e) Communication toolkits for NCCHW's team and network of partners on how to use new materials
- f) Development of both short- and long-term marketing and communications plan that includes which team members will be responsible for which tasks and when and how to complete them
- g) Effectively communicate various forms of data to diverse audiences
- h) Social media support for both NCCHW's team and network of partners to include planning, scheduling, and developing social media posts across various platforms
- i) Photo and video support for developing a database of relevant photos and videos to share and acquiring media releases as needed
- j) Education about outreach strategies and effective marketing and communications, especially regarding how to share, promote, and lead policy work
- k) SEO (search engine optimization) and further suggestions for measuring the effectiveness of our efforts

5.5 INTENDED AUDIENCE

The marketing and communications plan should include materials that can accommodate various intended audiences including:

- a) NCCHW's team and other internal UNCA partners
- b) Health Care Professionals
- c) Evidence-Based Community Health Program Leaders
- d) Evidence-Based Community Health Program participants
- e) Area Agencies on Aging (AAAs)
- f) Community Based Organizations (CBOs)
- g) Health Insurance Companies
- h) Other external partners and funders as needed

5.6 CONSULTANT REQUIREMENTS

Respondents to this RFP must meet the following requirements:

- e) Must be willing and able to:
 - Attend NCCHW meetings to better understand the marketing and communication needs of the team
 - Conduct a marketing and communication needs assessment for NCCHW and communicate the needs identified with the NCCHW team
 - Develop templates for marketing and communications materials to address the needs identified
 - Build a database of photos and videos for the NCCHW team to use freely for marketing and communication purposes
 - Create a marketing and communications plan that includes who, when, where, and how the NCCHW team will implement all marketing and communications efforts beyond the length of hire including:
 - Website updates
 - E-newsletter sharing
 - Social media posts
 - Flyers and other informational content
 - Ensure each effort is measurable and train the NCCHW team on how to track and measure the outcomes of all marketing and communications activities
 - Educate the NCCHW team on best practices regarding marketing and communications

5.7 PROJECT ORGANIZATION

Vendor shall describe the organizational and operational structure (organizational chart) it proposes to utilize for the work described in this RFP, and identify the responsibilities to be assigned to each person Vendor proposes to staff the work.

5.8 TECHNICAL APPROACH

Vendor's proposal shall include, in narrative, outline, and/or graph form the Vendor's approach to accomplishing the tasks outlined in the Scope of Work section of this RFP. A description of each task and deliverable and the schedule for accomplishing each shall be included.

5.8 ACCEPTANCE OF WORK

In the event acceptance criteria for any work or deliverables is not described in contract documents or work orders hereunder, UNC Asheville shall have the obligation to notify Vendor, in writing ten (10) calendar days following completion of such work or deliverable described in the Contract that it is not acceptable. The notice shall specify in reasonable detail the reason(s) it is unacceptable. Acceptance by UNC Asheville shall not be unreasonably withheld; but may be conditioned or delayed as required for reasonable review, evaluation, installation or testing, as applicable of the work or deliverable. Final acceptance is expressly conditioned upon completion of all applicable assessment procedures. Should the work or deliverables fail to meet any requirements, acceptance criteria or otherwise fail to conform to the contract, UNC Asheville may exercise any and all rights hereunder, including, for deliverables, such rights provided by the Uniform Commercial Code as adopted in North Carolina.

Vendor: _____

5.9 TRANSITION ASSISTANCE

If this Contract is not renewed at the end of this term, or is canceled prior to its expiration, for any reason, Vendor shall provide, at the option of UNC Asheville, up to 1 month after such end date all such reasonable transition assistance requested by UNC Asheville, to allow for the expired or canceled portion of the Services to continue without interruption or adverse effect, and to facilitate the orderly transfer of such services to UNC Asheville or its designees. If UNC Asheville exercises this option, the Parties agree that such transition assistance shall be deemed to be governed by the terms and conditions of this Contract (notwithstanding this expiration or cancellation), except for those Contract terms or conditions that do not reasonably apply to such transition assistance. UNC Asheville shall pay Vendor for any resources utilized in performing such transition assistance at the most current rates provided by the Contract for performance of the services or other resources utilized.

6.0 CONTRACT ADMINISTRATION

6.1 PROJECT MANAGER AND CUSTOMER SERVICE

The Vendor shall designate and make available to NCCHW a project manager who ideally is also responsible for the majority of desired services. The project manager shall be NCCHW's point of contact for contract related issues and issues concerning performance, progress review, scheduling and service.

6.2 POST AWARD MANAGEMENT REVIEW MEETINGS

The Vendor, at the request of NCCHW, shall meet biweekly with NCCHW for Project Review meetings. The purpose of these meetings will be to review project progress reports, discuss Vendor and State performance, address outstanding issues, review problem resolution, provide direction, evaluate continuous improvement and cost saving ideas, and discuss any other pertinent topics.

6.3 DISPUTE RESOLUTION

The parties agree that it is in their mutual interest to resolve disputes informally. A claim by the Vendor shall be submitted in writing to NCCHW's Contract Lead for resolution. A claim by NCCHW shall be submitted in writing to the Vendor's Project Manager for resolution. The Parties shall negotiate in good faith and use all reasonable efforts to resolve such dispute(s). During the time the Parties are attempting to resolve any dispute, each shall proceed diligently to perform their respective duties and responsibilities under this Contract. If a dispute cannot be resolved between the Parties within thirty (30) days after delivery of notice, either Party may elect to exercise any other remedies available under this Contract, or at law. This term shall not constitute an agreement by either party to mediate or arbitrate any dispute.

6.4 CONTRACT CHANGES

Contract changes, if any, over the life of the contract shall be implemented by contract amendments agreed to in writing by NCCHW and Vendor.

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Attachments to this RFP begin on the next page.

Vendor: _____

7.0 ATTACHMENTS

ATTACHMENT A: INSTRUCTIONS TO VENDORS

The Instructions to Vendors, which are incorporated herein by this reference, may be found here:

https://files.nc.gov/ncdoa/pandc/OnlineForms/Form_North-Carolina-Instructions-to-Vendors_09.2020.pdf

ATTACHMENT B: NORTH CAROLINA GENERAL CONTRACT TERMS & CONDITIONS

The North Carolina General Terms and Conditions, which are incorporated herein by this reference, may be found here:

https://files.nc.gov/ncdoa/pandc/OnlineForms/Form_North-Carolina-General-Terms-and-Conditions_09.2020.pdf.

ATTACHMENT C: LOCATION OF WORKERS UTILIZED BY VENDOR

The Location of Workers Utilized by Vendor associated with this RFP is a separate document that can be found at the following link:

https://files.nc.gov/ncdoa/pandc/OnlineForms/Form_Location-of-Vendors-Located-Outside-the-United-States_01.2020.pdf.

ATTACHMENT D: CERTIFICATION OF FINANCIAL CONDITION

The Certification of Financial Condition associated with this RFP is a separate document that can be found at the following link:

<https://files.nc.gov/ncdoa/pandc/OnlineForms/CERTIFICATION-OF-FINANCIAL-CONDITION.pdf>.

Attachments continued next page

Vendor: _____

ATTACHMENT E: EVALUATION MATRIX

CRITERIA CHECKLIST

Scores Available from 1-5. Basis for scoring must be listed with specific examples.

1. Adherence to RFP Instructions	VENDOR 1	VENDOR 2	VENDOR 3	BASIS FOR SCORE
Timeliness (date of submission)	0	0	0	
Completeness	0	0	0	
Overall Quality & Level of Professionalism	0	0	0	
Overall Response	0	0	0	
2. Vendor Information	VENDOR 1	VENDOR 2	VENDOR 3	BASIS FOR SCORE
Organizational Structure	0	0	0	
Experience with Similar Companies	0	0	0	
Access to Team Members	0	0	0	
References	0	0	0	
3. Project Understanding	VENDOR 1	VENDOR 2	VENDOR 3	BASIS FOR SCORE
Overall Comprehension of Project Objectives	0	0	0	
Understanding of Requirements	0	0	0	
Understanding of Vision	0	0	0	
4. Requirements	VENDOR 1	VENDOR 2	VENDOR 3	BASIS FOR SCORE
Completeness of Vendor Response	0	0	0	
Vendor Ability to Meet Requirements	0	0	0	
Total Points	0	0	0	

ATTACHMENT F: CUSTOMER REFERENCE FORM

The Customer Reference Form associated with this RFP is a separate document that can be found at the following link:

https://files.nc.gov/ncdoa/pandc/OnlineForms/Form_Customer-Reference-Template_092020.pdf.

ATTACHMENT G: HUB SUPPLEMENTAL SUPPLIER INFORMATION

The Historically Underutilized Businesses (HUB) Supplier Information associated with this IFB is a separate document that can be found at the following link:

https://files.nc.gov/ncdoa/pandc/OnlineForms/Form_HUB-Supplemental-Vendor-Information_9.2020.pdf.