

Request for Proposal

BRANDING AND PROMOTION STRATEGY FOR LAKESIDE MEDICAL CENTER

Project Name

Lakeside Medical Center Branding and Promotion

Project Number

08-LAKESIDEBRAND / WE

Deadline for Response

Responses to this RFP must be received via email no later than 4:00pm on Tuesday, December 30, 2008.

Project Overview

The Health Care District of Palm Beach County (“the District”) is currently constructing the Lakeside Medical Center (“Lakeside”), a 70-bed public hospital in the rural western region of Palm Beach County bordering Lake Okeechobee. Scheduled to open in late 2009, Lakeside will replace 62-year-old Glades General Hospital in Belle Glade, which is currently the only acute-care hospital in the region and the only public hospital in Palm Beach County.

Starting even before the groundbreaking, the District has pro-actively publicized the new regional hospital project through various channels, including presentations in the community, signs, a dedicated web page, and print ads. In September 2008 the District issued a Request for Qualifications (RFQ) to identify firms with demonstrated expertise in hospital naming and branding. As a result of the RFQ process, the District selected and engaged Franklin Street Marketing to carry out the naming phase of the project. On December 10th, 2008 the District Board selected the name “Lakeside Medical Center.”

Over the next nine months the District must accomplish the following goals:

1. Develop a market position / competitor analysis for Lakeside to support strategies for physician recruitment and attracting more insured patients.
2. Develop and implement a comprehensive strategy to promote the value of Lakeside to the residents of the regional service area and the target physician community.
3. Create a brand identity for Lakeside, including a logo, tagline, and mission statement.
4. Produce all the functional/operational communications that Lakeside will need from day one, including directories, signage, informational brochures, a dedicated web site, etc.
5. Develop materials for use in publicity and marketing campaigns, both pre-opening and post-opening.

In order to achieve these goals, the District seeks the services of a firm with expertise in hospital branding and promotion, preferably including rural hospitals. The specific Scope of Services for this phase of the project is set forth below.

Scope of Services

1. Research

- Review existing relevant research that the District has compiled from opinion polls, surveys, and interviews.
- Identify any gaps or shortfalls in the existing research findings and recommend supplementary research.
- Identify techniques and metrics for measuring return on investment for branding and marketing costs in the first 12 months.
- Present findings in a written report with analysis of market potential/positioning and recommended strategies, tactics, and products to achieve stated goals.

2. Hospital Brand Development

- Create a logo, color palette, and other visual branding elements which effectively link the brand of the new hospital with the overarching brand of the District.
- Develop a tagline and mission statement for Lakeside.
- Produce a Brand Guidelines manual, including parameters and specifications for logo use, color palette, etc.
- Design a suite of templates for key functional communications and day-one publications, such as business cards, letterhead, envelopes, hospital directory, visitor map, welcome brochures, etc.
NOTE: The District recognizes that this is rather open-ended. Vendors should indicate in their Proposal exactly what they propose to provide within the scope of this project.

3. Internal Promotion

- Review the District's plan for the transition of staff and technology from Glades General Hospital to Lakeside and develop a communications component for that plan.
- Formulate messaging to help staff understand, internalize, and effectively communicate the brand and carry out the transition plan.

4. Publicity and Advertising

- Formulate brand-based messaging for use in external communications to publicize and promote Lakeside.
- Develop a 9-month strategic plan for conducting promotional activities both in the regional Service Area and throughout Palm Beach County at large.
- Recommend messaging to be used at Glades General Hospital (the existing hospital) when the new security and Visitor ID system is implemented.
- Develop a tactical plan for building stakeholder and community support for Lakeside.
- Recommend ways to expand the volunteer program currently in place at Glades General Hospital.

Budget

The District has a budget for this project not to exceed \$75,000. This budget is intended primarily for the research, advisory, and specific design services specified above. The actual production of the various communications (e.g., printing, development of web site, etc.) will be handled through subsequent projects.

NOTE: The District has deliberately left the Research and the Design services somewhat open-ended.

These are two key areas where the District is looking for expert advice from the vendor. Proposals should quantify what can be delivered in these two areas within the project fee, and what would require additional services.

Format of Response

Proposals must be submitted via email in printable format on or before the deadline to be considered. The Proposal must be a self-contained document with all requested information. The Proposal may include references to supplementary/supporting information on web sites. The Proposal must include the following:

A. STATEMENT OF QUALIFICATIONS

Provide specific information to illustrate the capabilities of the firm to deliver the Scope of Services.

Where possible, reference relevant work performed in other engagements and/or provide samples of relevant client projects, such as printed communications, published articles or case studies, presentations, photographs, and Web site URLs.

B. PRICING METHODOLOGY / FEE STRUCTURE

Provide an overall project fee as well as a proposed breakdown of costs for the specific services. *NOTE: As indicated above, vendors are strongly encouraged to demonstrate how they propose to structure this engagement so that the entire package of Services may be provided within the not-to-exceed budget.*

Vendors may offer different cost scenarios in their Proposal. The cost breakdowns may include estimated cost ranges for specific line items (e.g., a bracketed range for research, depending on the type and scale of research).

C. AGENCY / COMPANY INFORMATION

Give a succinct profile of the firm, including the office location(s), years in current business, number of direct employees, list of healthcare and government clients, and any awards and other professional recognition

D. REFERENCES

Provide three client references, preferably for assignments comparable in scope and character to what is defined in the Scope of Services. Indicate when the work was performed and provide a contact name, email and/or telephone number for each reference.

Questions

Recipients of this RFP may email substantive questions regarding the content of this RFP to the Communications and Public Affairs Department within the time period indicated in the Schedule (see “Response Contact” and “RFP Schedule” below). The District will consider such questions on their merit. In line with above guidelines on budget, the District may or may not respond to questions regarding specific deliverables for research and/or design templates. If the District decides to respond to a question, it

shall do so in the form of a written Addendum that will be posted in the District web site at www.hcdpbc.org as an addendum to the RFP.

From the time the District advertises this RFP until it awards a contract to a successful Proposer, any Proposer (or any of its representatives or agents) is prohibited from any communication about this proposal with District Personnel, Board of Commissioners, and/or Finance Committee. This stipulation does not apply to oral presentations to the Evaluation/Selection Committee, contract negotiations, or public presentations made to the District during any duly noticed public meeting. Violation of these provisions shall render any RFP proposal or award to the violator void.

Evaluation Criteria and Selection Process

All Proposals which are received prior to the deadline will be submitted to an Evaluation and Selection Committee (the “Committee”) comprised of District staff, a representative of the Glades General Hospital Board, and others as warranted.

The Committee will review the Proposals and eliminate any that fail to meet the following minimum requirements: (a) The respondent has no conflict of interest with the District, its Board or Committees or with regard to any other work performed by the firm for the District; and (b) The Proposal complies with the overall RFP specifications and format.

The Committee will convene in a special meeting to evaluate the Proposals. This meeting will be publicized in advance and will be open to the public. In this meeting the Committee members will evaluate and rank the Proposals according to the following criteria:

1. **EXPERTISE AND EXPERIENCE OF THE FIRM: 30 Points Maximum**
 - A. The firm's past experience and performance on comparable engagements
 - B. The experience of the firm's personnel to be assigned to the engagement
 - C. The size and location of the office which will handle the engagement
 - D. Experience with rural hospitals
 - E. Credibility and response of client references
2. **METHODOLOGY AND APPROACH: 40 Points Maximum**
 - A. Evidence that the vendor understands the project goals, scope, and constraints and has prepared a tailored Proposal
 - B. Adequacy of proposed staffing plan for various segments of the engagement
 - C. Level of detail in analysis and recommendations for each component of the Scope of Services
 - D. Innovative and cost-effective solutions
 - F. Detailed and prioritized implementation plan, including methods and procedures to measure the effectiveness of the plan during implementation
 - G. Additional information and/or ideas that demonstrate the vendor's creative approach to the challenges and opportunities of the project

3. COST AND COST SCENARIOS: 30 Points Maximum

- A. Overall project fee
- B. Level of detail in the cost breakdown
- C. Creative approach to structuring the solution within the not-to-exceed budget

In the evaluation stage, the District may request additional information from a respondent. The District may invite one or more respondents to make a presentation at the District's headquarters in downtown West Palm Beach, Florida. If a vendor is invited to present, the vendor is responsible for any and all expenses incurred.

The District will retain all Responses and supplementary documentation on file. The District reserves the right to use any idea in any Proposal, regardless of whether or not that vendor is engaged for the Services. The District observes all regulations regarding copyrighted and/or trade-marked materials which vendors provide with their responses.

Vendor Selection

Based on the outcome of the above process, the Committee will decide which vendor, if any, is best qualified to provide the Services and make an award recommendation. The District shall be the sole judge of its own needs and requirements regarding this RFP and any resulting negotiated contracts. The District's decisions shall be final.

Vendor Engagement

The District will post the award decision on the District's web site (under "Public Information") and notify all recipients of this RFP via email. The District will send a Vendor Registration Form to the selected firm. This is a short form which requests standard information on the business entity. In order to complete the process of qualification the vendor must complete and return the Form to the District within 24 hours. The submission of this form does not constitute an engagement. The District engages vendors only on the basis of a Contract or Agreement.

The District seeks to execute a contract with the selected vendor within ten working days. *Given the importance and urgency of this project, the District wishes to begin work on this project no later than mid-January, 2009.*

RFP Schedule

NOTE: the following timetable is indicative. The District may skip certain phases (e.g., issuing an addendum, holding presentations) at its discretion and thereby accelerate the process. If the District modifies the following schedule, changes will be posted to the District's website at www.hcdpbc.org

District issues RFP	December 16, 2008
Deadline for emailing any written questions	December 23, 2008
District releases final addendum (if necessary)	December 29, 2008
Deadline for receipt of Proposals via email	December 30, 2008
Evaluation/Selection Committee meeting.....	January 6, 2009

Presentations (only if the District deems necessary)..... To be determined

Recommendation to negotiate award..... January 9, 2009

Award/anticipated start date of contract January 15, 2009

RFP Postponement / Cancellation / Reissue

The District may at its sole and absolute discretion reject any and all or part of any and all, responses; postpone or cancel at any time this RFP process; or waive any irregularities in this RFP or in any responses received as a result of this RFP.

Cost Incurred to Respond

Any expense involved with the preparation and submission of a Response to this RFP, or any other work performed in connection therewith, is the sole responsibility of the respondent and will not be reimbursed by the District, unless otherwise agreed in writing in advance.

Sunshine Law

Respondents are hereby notified that all information submitted as part of a response to this RFP will be available for public inspection after receipt of responses, in compliance with Chapter 286, Florida Statutes, known as the Florida Government in the Sunshine Law.

Response Contact

Please email any questions and your Proposal, per the above schedule, to:

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Communications and Public Affairs Department
Health Care District of Palm Beach County
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