



**PORT OF TACOMA
REQUEST FOR PROPOSALS
No. 069313**

Branding and Identity Development

Issued by
Port of Tacoma
One Sitcum Plaza
P.O. Box 1837
Tacoma, WA 98401-1837

RFP INFORMATION	
Contact:	Jana Prince, Procurement Representative
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Submittal Date	JUNE 15, 2011 @ 4:00 PM (PST)

***PLEASE SUBMIT ALL CORRESPONDENCE AND PROPOSALS VIA E-MAIL
DIRECTLY TO THE PROCUREMENT REPRESENTATIVE LISTED ABOVE AND
INCLUDE 'BRANDING AND IDENTITY DEVELOPMENT' IN THE SUBJECT LINE***

**PORT OF TACOMA
REQUEST FOR PROPOSALS (RFP)
BRANDING AND IDENTITY DEVELOPMENT**

The purpose of this RFP is to solicit proposals from interested firms/teams with extensive experience and expertise in providing services to assist the Port of Tacoma (Port) with branding and identity development.

A. PROJECT BACKGROUND

The Port has helped drive Pierce County's economy for nearly 100 years. Established as a public port in 1918, trade has factored prominently into our local and state economy.

Beginning with natural resources (timber, fishing) expanding to manufacturing (chemicals, ship-building, aluminum) and further expanding to containerized cargo, the Port has grown from a local port into the international trade arena.

The Port is in a transitional period; changes in technology, transportation, environmental regulations, economic climates and political identities all affect how the Port will develop and be transformed over the next 20 years.

With increasing competition, it is critical for the Port to demonstrate through its facilities, services, people and messaging that it deserves the business.

The Port recently conducted a SWOT Analysis to identify strengths, weaknesses, opportunities and threats. The Port is currently involved in a strategic planning efforts to develop business goals for the future and to maintain, attract and increase business.

Identity is as much a piece of infrastructure as facilities are. The Port must uncover and capitalize on the qualities that differentiate it from the competition, then communicate those qualities immediately and succinctly through a brand identity.

The objective of this branding effort is to create a Port of Tacoma brand that reflects strategic advantages and unique identity now and into the future.

B. SCOPE OF SERVICES

This work will complement and run concurrently with a separate strategic planning effort, currently scheduled to be complete fall 2011. A finalized schedule will be negotiated with the selected consultant to coordinate with the strategic planning schedule.

Coordination with the Port, the strategic planning consultant and other project stakeholders is an essential element of work. Coordination meetings, in person or through conference calls will be scheduled during the course of this contract.

1. Research and Development:

Conduct an audit to review the Port's existing identity, using feedback from previous focus groups, phone surveys, customer roundtables, the recent SWOT (Strengths, Weaknesses, Opportunities & Threats) analysis, information obtained from the ongoing strategic planning effort and customer surveys provided by the Port.

The Consultant may conduct additional research, as needed, to obtain information and feedback on how the Port can improve, build upon or change to align with current business goals.

2. Branding Strategy Development and Testing:

Develop 3 draft concepts, including messages, logos, typography, and color palettes that clearly and immediately identify the Port of Tacoma using the descriptors uncovered through the above research phase.

Following the presentation of the draft concepts; Port staff and other project stakeholders will review and work with the Consultant to create a preferred branding and identity concept for additional testing. Testing includes seeking feedback from internal and external stakeholders.

The Consultant will prepare one final revised design concept, based on the feedback, with sufficient details to visually identify all elements and components of the preferred concept.

3. Brand Implementation:

Following final approval by the Port; the Consultant will completely develop the preferred concept and provide a plan for incorporating new brand identity into all communications, marketing, materials and signs. The plan will include: design standards, guidelines for use and layout templates. The Consultant will secure copyright protection on behalf of the Port for the brand.

4. Design Incorporation

At the sole option of the Port, a later phase of work under this contract consists of implementing the new brand into the design of Port materials.

C. DELIVERABLES:

The Consultant will deliver to the Port:

- A detailed work plan, consisting of schedule, work tasks and an outreach strategy, to accomplish the above referenced phases.
- An audit report consisting of findings, analysis and recommendations for branding strategy development and testing
- 3 draft concepts to be presented to the Port.
- A final design concept to consist of key descriptors, logos, typography, color palettes, taglines and usage guidelines.
- Separate presentations of the design concepts to Port's Leadership staff, stakeholders and Commissioners
- Draft and final implementation plan consisting of:
 - o design standards, guidelines for use, communications plan;
 - o recommended approaches to launch the new brand internally and externally.
- Consultant will deliver final electronic files on a CD or DVD in their original format. Unless previously produced for another purpose, the Port holds full rights to the original work generated for this RFP and a resulting contract. Reference "Ownership of Work" in the Port's Standard Terms and Conditions (Attachment A).

E. PROPOSAL ELEMENTS:

Proposals should present information in a straightforward and concise, but ensuring complete and detailed descriptions of the Proposer's abilities to meet the requirement of this RFP. Emphasis shall be on completeness of content.

Proposals are limited to **10** numbered pages (8 ½ by 11 inch) **excluding** the cover letter and appendices. Proposals that exceed 10 pages will not be reviewed. At a minimum, proposals should address:

INITIAL EVALUATION PHASE

1. Team Experience.....30 PTS

The successful team should have extensive organizational branding and identity development expertise and experience.

- Identify specific expertise in developing identities to match research findings including prevailing science and standards.
- Specify the proposed team by name, position and firm (if using subconsultants.) Provide a brief description of each team member's role on the project.
- Outline specific experience and expertise of team members. Include each individual's experience, a list of recent and similar projects and technical expertise.

Resumes of team members are to be included as an appendix and are not included in the total page count. Resumes are to be limited to one single-sided, letter-sized page.

2. Approach and Methodology.....40 PTS

Proposals should clearly outline the team's recommended approach and methodology for:

- Accomplishing the Scope of Services: Researching perceptions about and descriptors for the Port from community and business leaders in conjunction with concurrent strategic planning efforts; developing identities to match research findings and prevailing science and standards; and incorporating new brand identity into all communications, marketing, materials and signs.
- Coordination: Communications and interactions between the project team, the Port's project managers and the various stakeholders involved.

3. Cost Proposal.....20 PTS

Clearly outline the firm's recommended approach and cost for **each phase** as outlined in the Scope of Services.

In addition, present detailed information on the firm's proposed fee structure for the services proposed. Specify any third party involvement, additional fees, charges, and expenses that are, or may be, billable to the Port. All rates quoted shall be full cost inclusive of sales tax and other government fees, taxes and charges and valid throughout the contract period unless otherwise amended and agreed to by both parties in writing.

4. Accuracy and Completeness of the Proposal.....10 PTS

Proposals will be evaluated on the following criteria:

- Formatting and layout
- Spelling and grammatical accuracy
- Legibility of figures and chart information
- Coherent and logical flow of written responses
- Accuracy of information presented

RESPONSIBILITY CRITERIA

5. Firm's Claim History.....0 PTS

Describe any claim submitted by the firm to any client, or submitted by any client against the firm, within the past two years related to the professional services provided by the firm or its key personnel. For purposes of this request, "claim" means a sum of money in dispute in excess of 10% of the firm's fee for the services provided.

The Port will review any claims and make any necessary determination based on the information provided; points are not assigned to claim history.

6. Terms and Conditions.....0 PTS

List any exceptions your firm may have to accepting the Port's standard Terms and Conditions. Describe the nature of any exceptions to the Port's standard Terms and Conditions and firm's proposed alternative.

The Port will review any exceptions and discuss, as needed, with proposer(s); points are not assigned to terms and conditions exceptions.

FINAL EVALUATION PHASE

7. References.....50 PTS

Reference checks may be performed on the apparent selected vendor, if based directly on the proposals received or on shortlisted firms if interviews are being requested. The Port will evaluate the reference checks to assess the proposed team's overall performance and success of previous, similar work. Reference checks will also be utilized to validate information contained in the proposal.

8. Interviews (as requested by the Port).....100 PTS

If an award is not made based on the written evaluations alone, oral interviews will be conducted with the top-ranked proposers. Failure to participate in the interview process will result in the Proposer's disqualification from further consideration.

F. PROCUREMENT PROCESS

Issuance of RFP	MAY 20, 2011
Proposal packets due	JUNE 15, 2011 @ 4:00 PM (PST)
Short List Consultants	JUNE 28, 2011
Interviews (if required)	JULY 19 – 22, 2011
Execute Contract	JULY 29, 2011

VENDOR OBLIGATION

Port of Tacoma Requests for Bids, Requests for Proposals and Requests for Qualifications can be accessed on the Port's website, www.portoftacoma.com under 'Business Opportunities'; A/E and Professional Services; RFPs/RFQs.

To document interest in a project, the Port strongly encourages Submitters to email the Port at procurement@portoftacoma.com (Firm Name and Solicitation Name in subject line) to request placement on the document Holders List for this solicitation. Provide the Main Contact Name, Address, Email, and Phone number to be included on the RFP Holders List. Firms requesting to be placed on the Holders List will receive electronic notification regarding any issued addenda or other important information concerning the solicitation.

COMMUNICATION / INQUIRES

Written questions about the meaning or intent of the Solicitation Documents shall only be submitted to Jana Prince, procurement@portoftacoma.com (Firm Name and Solicitation Name in subject line). Submitters who may have questions about provisions of these documents are to email their questions by **Thursday, June 9, 2011 at 5:00 PM (PST)**. The Port will respond to all written questions submitted before the date and time above.

All communication and inquiries shall be sent to procurement@portoftacoma.com. Proposer's who, relative to this scope of work, contact any individuals or Commission members representing the Port, other than procurement@portoftacoma.com, may be disqualified from consideration.

News releases pertaining to this RFP, the services, or the project to which it relates, shall not be made without prior approval by, and then only in coordination with, the Port.

ADDENDA

The Port may make changes to this Solicitation. Oral or other interpretations, clarifications or submittal instructions will be without legal effect. If at any time, the Port changes, revises, deletes, clarifies, increases, or otherwise modifies the Solicitation, the Port will issue a written Addendum to the Solicitation. Any information modifying a solicitation will be furnished to all bidders by a formal, written addendum. Addenda will be posted at the Port's web site and conveyed to those potential submitters who have requested to be placed on the Holders List.

EVALUATION AND AWARD PROCESS

An evaluation team will review the proposals and evaluate all responses received based upon the criteria listed herein. The Port may request clarifications or additional information, as needed. A selection may be made based on the proposals alone or a combination of the proposals, references, and interviews.

The Port intends to select the proposing team who represents the best value to the Port and begin the award process based on the evaluated scores.

The selected firm will be invited to enter into contract negotiations with the Port. Should the Port and the selected firm not reach a mutual agreement, the Port will terminate negotiations and move to the next selected firm and proceed with negotiations.

The Port reserves the right to accept or reject any or all information in its entirety or in part and to waive informalities and minor irregularities and to contract as the best interest of the Port. The Port reserves the right to reject any or all Proposals submitted as non-responsive or non-responsible.

G. SUBMITTAL PROCESS

Proposals are required to be received via email on or before the date and time outlined on the front page of this RFP. **Proposals received after the stated deadline will not be considered.** Send your electronic submittal to:

procurement@portoftacoma.com.

Name of Firm, Branding and Identity Development (Subject Line)

Submit an electronic copy in Adobe Acrobat PDF format, including all appendices. Submittals need to be limited to **9 MB in total email size**. It is the Consultant's responsibility to verify the receipt of the submittal. Electronic verification will be provided upon request.

H. GENERAL INFORMATION

TRAVEL

The Port does not anticipate traveling to support this contract. Should it become necessary, the following guidelines will apply:

Airfare will be reimbursed at the coach rate. The Port will reimburse for up to a mid-size vehicle with standard equipment (this does not include GPS, video screens, etc.) utilized during the performance of this agreement when travel is authorized by the Port. The Port will also reimburse for gasoline expense associated with a rental vehicle with the exception of gasoline provided/billed by the rental car company. Receipts are required for all reimbursed expenses with the exception of meals. Reimbursement will only be for actual costs incurred subject to the ceiling rates defined in Port's Guidelines for Consultant Fees and Reimbursable Items (Attachment B).

Lodging and meal reimbursement is in accordance with the per diem rates (Attachment C). Amounts reimbursed will be computed at the rate for the physical location to which travel is authorized by the Port. Lodging and travel, other than local mileage, must be approved in writing by the Port's Project Manager prior to performing travel. Requests for travel should include a breakout of costs associated with the requested travel.

PUBLIC DISCLOSURE:

Proposals submitted under this Solicitation will be considered public documents and, with limited exceptions, will become public information and may be reviewed by appointment by anyone requesting to do so following the conclusion of the evaluation, negotiation, and award process. This process is concluded when a signed contract is completed between the Port and the selected Consultant.

If a vendor considers any portion of its response to be protected under the law, the vendor shall clearly identify each such portion with words such as "CONFIDENTIAL", "PROPRIETARY" or "BUSINESS SECRET". If a request is made for disclosure of such portion, the Port will determine whether the material should be made available under the law. If the material is not exempt from public disclosure law, the Port will notify the vendor of the request and allow the vendor five (5) days to take whatever action it deems necessary to protect its interests. If the vendor fails or neglects to take such action within said period, the Port will release the portions of the Qualifications deemed subject to disclosure. By submitting a response the vendor assents to the procedure outlined in this paragraph and shall have no claim against the Port on account of actions taken under such procedure.

ATTACHMENT A – PORT OF TACOMA TERMS AND CONDITIONS

ATTACHMENT B – PORT OF TACOMA'S GUIDELINES FOR CONSULTANT FEES AND REIMBURSABLE ITEMS

ATTACHMENT C – PER DIEM RATES

Port of Tacoma Terms And Conditions

Personal Services Agreement

In consideration of the mutual covenants, obligations, and compensation to be paid by the Port to Consultant, it is agreed that:

1. Key Personnel

The Consultant and/or its subconsultants' key personnel, as described in its Consultant selection submittals, shall remain assigned for the duration of the Project unless otherwise agreed to by the Port.

2. Relationship of the Parties

Consultant, its subconsultants and employees, is an independent Contractor. Nothing contained herein shall be deemed to create a relationship of employer and employee or of principal and agent.

3. Conflicts of Interest

Consultant warrants that it has no direct or indirect economic interest which conflicts in any manner with its performance of the services required under this Agreement. Consultant warrants that it has not retained any person to solicit this Agreement and has not agreed to pay such person any compensation or other consideration contingent upon the execution of this Agreement.

4. Compliance with Laws

Consultant agrees to comply with all local, state, tribal and federal laws and regulations applicable to the project, including building codes and permitting regulations existing at the time this Agreement was executed and those regarding employee safety, the work place environment, and employment eligibility verifications as required by the Immigration and Naturalization Service. Consultant shall obtain all professional licenses and permits required to complete the scope of work as defined.

5. Records and other Tangibles

Until the expiration of six years after the term of this Agreement, Consultant agrees to maintain accurate records of all work done in providing services specified by the Agreement and to deliver such records to the Port upon termination of the Agreement or otherwise as requested by the Port.

6. Ownership of Work

The services to be performed by Consultant shall be deemed instruments of service for purposes of the copyright laws of the United States. The Port has ownership rights to the plans, specifications, and other products prepared by the Consultant. Consultant shall not be responsible for changes made in the models, programs, reports or other products by anyone other than the Consultant. Consultant shall have free right to retain, copy and use any tangible materials or information produced but only for its own internal purposes. Use of models, programs, reports or other products prepared under this Agreement for promotional purposes shall require the Port's prior consent.

7. Disclosure

All information developed by the Consultant and all information made available to the Consultant by the Port, and all analyses or opinions reached by the Consultant shall be confidential and shall not be disclosed by the Consultant without the written consent of the Port.

8. Compensation

As full compensation for the performance of its obligations of this Agreement and the services to be provided, the Port shall pay Consultant as specified in the Agreement. Compensation for vehicle usage will be paid at the current Internal Revenue Service allowable mileage reimbursement rate. Consultant's expenses will be reimbursed at cost, subject to attached guidelines, with the exception of all third party costs which will be reimbursed at cost plus the negotiated percentage markup.

9. Payment Schedule

Consultant shall submit detailed numbered invoices showing description of work items being invoiced, work order number, title of project, total authorized, total current invoice, balance of authorization, individual's names and titles, hours, hourly rate and all authorized expenses itemized, with backup, in accordance with the Port's "Guidelines for

Port of Tacoma Terms And Conditions

Personal Services Agreement

Consultant Fees and Reimbursable Items", by the 10th of the month to be paid by the end of the current month, unless other terms are agreed to by the parties.

10. Costs and Disbursements

Consultant shall pay all costs and disbursements required for the performance of its services under this Agreement.

11. Insurance - Assumption of Risk

a) As a further consideration in determining compensation amounts, the Consultant shall procure and maintain, during the life of this Agreement, such commercial general and automobile liability insurance as shall protect Consultant and any subconsultants performing work under this Agreement from claims for damages from bodily injury, including death, resulting there from as well as from claims for property damage which may arise under this Agreement, whether arising from operations conducted by the Consultant, any subconsultants, or anyone directly or indirectly employed by either of them.

b) With respect to claims other than professional liability claims, Consultant and its subconsultants agree to defend, indemnify and hold harmless the Port of Tacoma, its appointed and elective officers and its employees from and against any and all suits, claims, actions, losses, costs, penalties and damages of whatever kind and nature, including attorney fees and costs by reason of any and all claims and demands on it, its officers and employees, arising from the negligent acts, errors or omissions by the Consultant in the performance of the Consultant's professional services.

c) With respect to professional liability claims only, Consultant and its subconsultants agree to indemnify and hold harmless the Port of Tacoma, its appointed and elective officers and its employees from and against any and all

suits, claims, actions, losses, costs, penalties and damages of whatever kind and nature, including attorney fees and costs by reason of any and all claims and demands on it, its officers and employees, arising from the negligent acts, errors or omissions by the Consultant in the performance of the Consultant's professional services.

12. Standard of Care

Consultant shall perform its work to conform to generally accepted professional standards. Consultant shall, without additional compensation, correct or revise any errors or omissions in such work.

13. Time

Time is of the essence in the performance by the Consultant of the services required by this Agreement.

14. Assignability

Consultant shall not assign any interest in this Agreement and shall not transfer any interest in the Agreement to any party without prior written consent of the Port.

15. Term of this Agreement

The effective dates of this Agreement are as specified. This Agreement may be terminated by the Port for cause when the Port deems continuation to be detrimental to its interests or for failure of the consultant to perform the services specified in the Agreement. The Port may terminate this Agreement at any time for government convenience in which case it shall provide notice to the Consultant and reimburse the Consultant for its costs and fees incurred prior to the notice of termination.

16. Disputes

If a dispute arises relating to this Agreement and cannot be settled through direct discussions, the parties agree to endeavor to settle the dispute through a mediation firm acceptable to both parties, the cost of which shall be divided equally. The Port reserves the right to join any dispute under this Agreement with any other claim in litigation

Port of Tacoma Terms And Conditions Personal Services Agreement

or other dispute resolution forum, and the Consultant agrees to such joinder, so that all disputes related to the project may be consolidated and resolved in one forum. Venue for any litigation shall be the Pierce County Superior Court of the state of Washington and the prevailing party shall be entitled to recover its costs and reasonable attorney's fees.

17. Extent of Agreement

This Agreement represents the entire and integrated understanding between the Port and Consultant and may be amended only by written instrument signed by both the Port and Consultant.

Port of Tacoma

Guidelines for Consultant Fees and Reimbursable Items

General Considerations

These guidelines are intended to assist consultants in developing fee proposals; exceptions may be appropriate for the particular scope of work and should be specifically negotiated.

Rates and multipliers will remain in effect for the contract term unless renegotiated and agreed to by both parties in a written change order.

No overtime rates of pay will be paid.

Hourly Rates And Expenses

The Port expects that the proposed hourly rates or multiplier of hourly rates include all routine overhead and internal expenses of the consultant. Inclusion of expenses in the hourly rate or multiplier reduces the amount of backup documentation required to support each invoice and expedites payment.

The Port expects that the proposed hourly rate includes the equipment, tools, software and supplies required to perform the work.

Hourly rates should be identified for all classifications anticipated to be itemized on the consultant's invoice.

Reimbursables

The Port will reimburse the following expenses at cost (**when appropriate backup is provided**):

1. Printing of review and final sets of deliverables; all deliverables shall also be provided on formatted disk at no additional charge.
2. Postage/shipping cost for deliverables
3. Film development
4. Mileage at \$.505/mile
5. Long distance telephone charges
6. Computer disks

Project field supplies consumed in the work will be reimbursed at cost plus 8% markup.

Unless specifically negotiated, **the Port will not separately reimburse the firm for routine overhead and internal expenses**, including:

1. Computer software or hardware usage
2. Graphics supplies or plotter use
3. Digital camera or batteries usage
4. Communications (except long distance) including: Cell phone rental; Fax transmissions; and routine postage or courier.
5. Routine reproduction or copying, except for deliverables (see reimbursables)

Lab Samples and Analysis

The unit price should include analytical costs. Sampling should be scheduled to ensure that results are received when required at normal turnaround rates. 24-hour or rush turnaround rates will be paid only when specifically requested by the Port. Lab services provided by a third party will be reimbursed at cost plus 8% markup.

Subcontracted Services

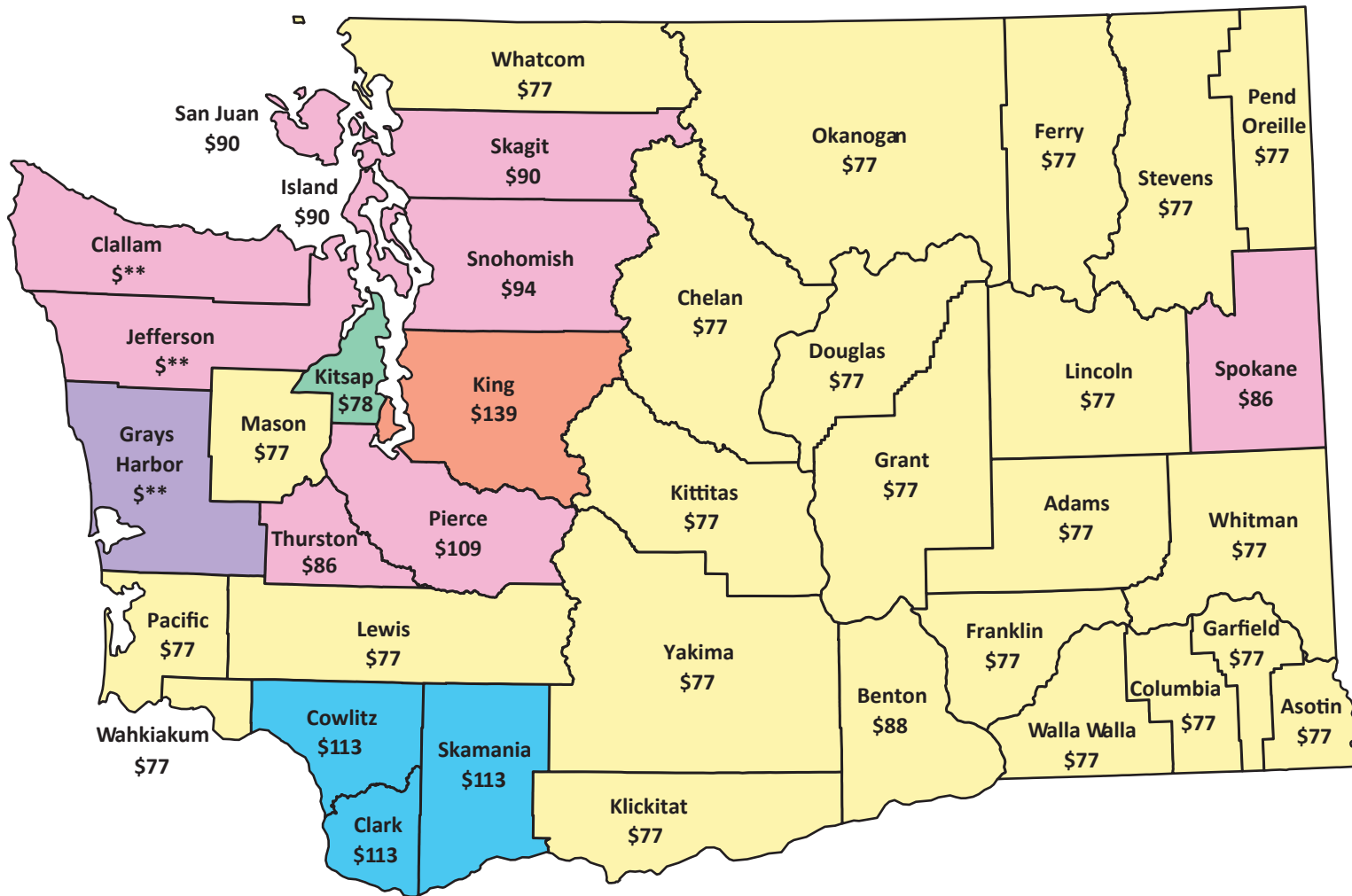
When specifically negotiated with the Port, subcontracted services will be reimbursed at cost plus 8% markup.

Invoice Format Guidelines

Invoices must be numbered in a format that shows the firm's unique sequential numbering system for invoicing.

Invoices should show description of work items being invoiced, work order number, Contract number, title of project, total authorized, total current invoice, balance of contract, individual's names and titles, hours at hourly rate, authorized expenses itemized with backup. When applicable, the invoice must show the percentage completion of each task within the scope of work. Payment will not exceed the percentage of work completed.

Per Diem Rates - As of October 1, 2010



Meal Rates				
TOTAL	B	L	D	
\$46	\$11	\$14	\$21	
\$51	\$13	\$15	\$23	
\$56	\$14	\$17	\$25	
\$61	\$15	\$18	\$28	
\$66	\$16	\$20	\$30	
\$71	\$18	\$21	\$32	

\$ Maximum Lodging Rate
 ** Seasonal Lodging Rates (see table)
 POV mileage rate \$.50 per mile
 (Effective January 1, 2010)

** Seasonal Lodging Rates for Counties:		
Clallam & Jefferson	07/01 - 08/31	\$123
	09/01 - 06/30	\$94
Grays Harbor	07/01 - 08/31	\$107
	09/01 - 06/30	\$88

For Out-of-State Per Diem Rates, refer to the GSA website at: <http://www.gsa.gov>. To get the total meal and incidental expense rate breakdown of individual meal allowances, refer to the State Administrative and Accounting Manual (SAAM), Subsection 10.40.10.c