

Central Texas Regional Mobility Authority

Request for Proposals

for

**COMMUNICATIONS AND MARKETING
CONSULTANT SERVICES**

Release Date: May 6, 2011

Amended: May 11, 2011

(changes highlighted in red)

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RFP TITLE	Communication and Marketing Consulting Services
ISSUING DATE	May 6, 2011
ISSUING AGENCY	Central Texas Regional Authority
CONTACT PERSON	Steve Pustelnyk, Director of Communications
PROPOSAL DUE DATE	4:00 p.m. CDST, June 10, 2011

1. Introduction

1.1 Summary of Request

The Central Texas Regional Authority (the “Authority”) is requesting information from professional firms interested in providing the Authority with Communication and Marketing services. Qualified respondents will be able to provide the Authority with strategic advice and staffing support in the development and implementation of public information programs, community relations, public involvement, media relations, advertising, marketing, promotions, special events, presentations, reports, publications, newsletters, websites, and research.

Firms submitting proposals must be well-established in the business of providing communication and marketing services to private sector clients. Experience working with governmental entities, transportation providers and/or firms involved in the toll industry is preferred.

1.2 Description of the Authority

The Authority is a regional entity granted broad powers under state law to study, design, construct, operate, expand, enlarge, and extend transportation projects in the region of the authority (i.e., Travis and Williamson Counties) and adjacent areas as permitted by law.

The powers and duties exercised by the Authority and its Board of Directors (the “Board”) are established by and subject to state and federal laws and regulations. Authority Board members and staff have been conducting public information and outreach efforts regarding the 183A Expressway, Manor Expressway, MoPac Improvement Project and other proposed transportation projects being developed by the Authority and which are intended to address congestion and improve mobility in the Central Texas region. The Authority is authorized to develop and implement transportation projects in Travis and Williamson Counties. The Authority works cooperatively with the Texas Department of Transportation and the Capital Area Metropolitan Area Planning Organization (CAMPO) to identify and implement transportation projects in the Central Texas area. The region is currently contemplating the construction of several toll projects that the Authority may ultimately be involved in constructing and/or operating. The Authority will be participating in public involvement activities for these projects.

2. Scope of Services

The Scope of Services to be provided by the Communication and Marketing firm or combination of firms may include, but not be limited to, the following:

1. On an annual basis, assist with the development of a Communication and Marketing Plan for the Authority. Support the development of an annual budget based on the needs identified in the Communication and Marketing Plan.
2. Work with Authority to support ongoing efforts to communicate the benefits of the 183A, Manor Expressway and other projects to potential customers and to promote the use of TxTag among drivers. .
3. Assist with the development of printed materials including but not limited to Annual Reports, Newsletters, Fliers, Maps and other publications through the provision of project management, graphic design, and copy development services. Identify qualified sub contractors and oversee the printing of such materials.
4. Support the Authority in the conduct of market research and customer satisfaction surveying to support and enhance ongoing tolls operations and communications activities. The firm shall use research data to create and develop information and promotional strategies and messages to educate and inform the public about 183A and other toll roads being developed, constructed or operated by the Mobility Authority. Use research findings to increase usage of the Mobility Authority's toll roads and cause measurable increases in the sale and usage of the TxTag on toll roads operated by the Authority.
5. Provide audio visual services as requested including, but not limited to script development, videography, video editing, audio recording, and still photography.
6. Support the Authority with the implementation of public involvement programs associated with the planning, design and construction and operation of transportation projects. Assist with the development of public involvement plans for projects and provide the technical and staffing support necessary to implement the plans.
7. Assist the Authority with public outreach activities with specific emphasis on identifying community organizations, scheduling presentations, and developing presentation materials using PowerPoint and other appropriate presentation tools. Provide the Authority with professional advice regarding key messages and talking points based on sound research.
8. Negotiate for and coordinate the purchase of print, television, radio and other appropriate advertising vehicles to reach target markets. Solicit free media time and space for public service announcements as appropriate, and support the

creation of compelling content for such print, television and radio advertisements and public services announcements.

9. Assist the Authority with media relations through the development and review of press releases and media alerts. Assist with the solicitation of media coverage and help coordinate press conferences. As required, provide video clips and news clips of stories involving the Authority and regional transportation issues.
11. Provide planning, logistical, and staffing support for the conduct of special events, public meetings, community forums, and other public outreach and education activities.
12. Support the staff of the Authority through the review and proofreading of documents to ensure they are grammatically correct, contain appropriate messaging and are customer friendly.
13. Provide Web site services to include: site hosting, technical support, page design and copy development. Develop innovative Web-based services such as social media to enhance communication with customers..
14. Develop strategies and assist with the implementation of programs to assist the Authority with providing superior levels of customer service to roadway customers and the general public.
15. Identify promotional opportunities and coordinate the acquisition of unique promotional items intended to enhance public awareness of the Authority and its various toll roads
16. Provide the Communications Director with a weekly update regarding ongoing activities and accomplishments. Appear before the Mobility Authority Board as necessary to provide program updates.

3. Respondent Qualifications

3.1 *Firm Qualifications*

A brief history and general description of the firm should include information relative to the capabilities and resources of its Texas headquarters office, its regional Texas offices, and listing of its Texas office resident personnel by discipline who definitely would be assigned to the Authority's work. Provide a synopsis of the firm's experience in providing marketing, advertising and public relations, education and outreach services to corporations and governmental entities, with particular emphasis on experience with toll and other transportation-related authorities or agencies.

- Experience with development and implementation of marketing, advertising and public education and outreach materials.

- Experience with developing a comprehensive multi-media advertising campaign, including designing content for same.
- Demonstrated experience applying and implementing a public outreach program using methods and procedures taught by the Institute of Participatory Management & Planning (a/k/a/ the “Bleiker” method), or an equivalent method for addressing public outreach.
- An abstract of the firm’s cost control procedures.
- A comprehensive description of the procedures used by the firm to supervise the provision of marketing, advertising and public education and outreach services in a timely and cost effective manner.
- Summarize how the firm charges professional fees for the services described in this RFP. Do not quote any fees except for the hourly fees required in the proposal.
- Disclose any conflicts or potential conflicts of interest. Disclose all contractual or informal business arrangement/agreements, including fee arrangements, consulting agreements, and the nature of any legal representation, between your firm and: the Authority staff and/or any of its Board members; any entity that provides services to the Authority or TxDOT; and any governmental entity or political subdivision within the geographic area encompassed by the Authority.

Proposers must comply with the Conflict of Interest disclosures policies adopted by the Authority’s Board of Directors and available at the Authority website, www.mobilityauthority.com.

3.2 *Firm Organization, Staffing and Procedures:*

1. Provide a skeleton organizational chart identifying key project management and lead personnel for both the firm and any of its anticipated subconsultants. The position titles and relevant areas of project responsibility for lead personnel should be indicated. Designate the firm’s principal office and officer to be directly responsible for potential Authority projects. Provide in detail the identified personnel’s experience with advertising, marketing and public education and outreach campaigns, particularly any governmental entities providing transportation-related services.
2. Provide the names and experience resumes of those key Central Texas based personnel named on the organizational chart who currently are full time employees of the firm and who definitely would be available to support current and potential Authority projects.

3. **Using Attachment “A,” provide hourly rates for all key personnel listed and identify the employee who will provide the services identified. The number of annual hours provided in Attachment “A” for each job classification are estimates. The actual assigned workload may vary. If a subconsultant will be performing one of the key jobs listed, provide the hourly rate to be charged to the Authority for that subconsultant. The hourly rates submitted will be incorporated into the contract document and there will be no increase to the rates during the initial two year contract period. The overall contract amount will be based on the Authority’s approved Communication and Marketing Budget for FY 2012. Historically the contract amount has averaged \$350,000 per year and is inclusive of the contractual agency’s employees, sub consultants and all services contracted by the contractual agency.**
4. Number of staff, broken into professional and sub-professional groupings, by specialty and by geographic location committed for availability.
5. The proposal should be based on the prospect that the Communication and Marketing services being tendered by the Authority will initially be for a two year term and may be extended for an additional two years, terminable at the desire of either party with 60 days notice.
6. Provide an abstract of the firm’s quality assurance procedures.
7. Provide an outline of procedures the firm would implement to perform the Authority communication and marketing services, i.e., a plan of action for creating, analyzing, and rendering Communication and Marketing related deliverables, such as television and radio advertisements, public service announcements, advertisements in print media, and direct mail pieces.

3.3 Experience

A listing of relevant projects accomplished within the past five years shall include the following:

1. Project name.
2. Project location.
3. A brief description of the project and the work performed.
4. Name, address, and telephone number of client contact.
5. A summary of those significant active projects expected to be underway in the firm’s designated project office during the calendar years 2011 through 2012. The summary should indicate staff levels by discipline that the firm has precommitted

to such projects, in sufficient detail to establish the firm's ability to provide the level of staffing required for Authority's high priority assignments.

6. A summary of all regulatory and legal proceedings initiated since January 1, 2005, in which the firm has been named as a respondent or defendant, including the nature of the proceeding, the claims made and resolution or current status thereof.

3.4 *Historically Underutilized ("HUB") and Disadvantaged Business Enterprise ("DBE") Participation*

1. Indicate whether your firm is a qualified "HUB" or "DBE" and if so provide supporting documentation including letters of certification.
2. Describe the provision for or the efforts made or that will be made for HUB and/or DBE participation if your firm were to receive the Authority assignment.
3. Provide an organizational chart for your organization indicating the total number of employees and the percentage of minority employees by standard classification for race and sex.
4. Identify all sub consultants that you propose to use on the project. List the name of the principal(s) and the home office address for each firm. Indicate if the firm will have staff supporting the Authority based in Central Texas and what specific tasks the firm would be hired to accomplish. If any of the sub consultant firms are certified as a HUB or DBE firm provide supporting documentation including letters of certification. If so, provide the name of the firm, the principals, with a summary of the work to be performed and the percentage of the total contract.
5. Describe the affirmative action plan of your firm.
6. State whether your firm will be able to conform with the requirements of Authority's policy on the participation of HUBs in Authority professional services and contracting opportunities. A copy of such policy is available at www.mobilityauthority.com.

4. Invoice Preparation

A single monthly comprehensive and detailed invoice shall reference the basis for each item charged and documentation that validates the charges shall be attached.

- Itemize all charges and provide copies of supporting documentation.
- **SERVICES: All project management, creative direction, public outreach,**

multi-media activities, graphic design, copywriting and other tasks performed directly by the vendor's staff shall be billed on an hourly basis at the hourly rates submitted by the vendor in Attachment "A."

- **HOURLY WAGES:** Each vendor employee must report the tasks they performed and the amount of time spent performing those tasks.
- **MEDIA:** All media purchases, except public service announcements, shall be billed at a flat rate. Itemize all charges and provide copies of supporting documentation for those charges for purchases of all media.
- **SUBCONSULTANTS:** The vendor must submit copies of individual invoices for any work performed by sub contractors. All subconsultant invoices shall be reimbursed at cost with no markup.

5. Copyrights

The vendor shall obtain necessary copyrights for the Authority.

- Vendor shall not assert rights at common law or in equity or establish any claim to statutory copyright any material or information developed in performance of the services authorized.
- The Authority has the right to use, reproduce, or distribute any or all of such information and other materials without the necessity of obtaining any permission from vendor and without expense and charge.
- Materials or information made or obtained by the vendor on behalf of the Authority may be used by the Vendor for other purposes if approved by in writing by the Authority.
- The Authority will not be held liable/responsible for any copyright infringements or liabilities thereto from videotapes provided by the vendor.

6. Ownership of Materials and Products

- The Authority will retain all property rights, including publication rights, to all products developed by vendor on the Authority's behalf.
- Vendor shall ensure that duplication and distribution rights are secured for the Authority from all contractors and subcontractors.
- The vendor shall warrant that individuals or characters appearing or depicted in print or videotapes have provided their written consent and have been compensated by the vendor for their appearance, if appropriate.

7. RFP Submittal Requirements and Process

Submittal text shall be limited to twenty (20) double sided pages in length, exclusive of professional resumes, cover sheets, flyleaves, tables of content, dividers, etc., printed on two sides and double-spaced. Materials submitted in excess of the specified 20 pages will not be reviewed.

Preprinted brochure material may be included in the submittal if desired and will not be counted in the 20-page maximum.

Proposals submitted to the Authority in response to this RFP will be reviewed by a CTRMA-designated Selection Committee to identify proposals that best serve the interests of the Authority and their customers. The Selection Committee will make a recommendation to the Executive Director who in turn may make a recommendation to the Board.

7.1 Contact Person for RFP Questions

All questions regarding the RFP shall be submitted in writing and must be received by the Central Texas Regional Mobility Authority, c/o Steve Pustelnyk at the address shown below no later than 4:00 p.m. C.D.S.T., May 27, 2011. Informal verbal inquiries are not allowed. NO QUESTIONS WILL BE ACCEPTED AFTER THIS DEADLINE. Written questions may be submitted via U.S. mail, in person, via fax at 512-996-9784 or via email to spustelnyk@ctrma.org.

Steve Pustelnyk
Director of Communications
301 Congress Avenue, Suite 650
Austin, TX 78701
512-996-9784 (Fax)
spustelnyk@ctrma.org

Responses to all questions received will be made available to all respondents via posting on the Mobility Authority web site at:

<http://mobilityauthority.com/opportunities/index.php>

7.2 Delivery and Deadline for Submission of Responses.

All proposal responses shall be received by the Central Texas Regional Authority, c/o Steve Pustelnyk, 301 Congress Avenue, Suite 650, Austin, TX 78701, no later than 4:00 p.m. C.D.S.T., June 10, 2011. Five copies of the response of a firm shall be submitted. NO PROPOSALS WILL BE ACCEPTED AFTER THE TIME AND DATE SPECIFIED.

The responsibility for submitting a proposal to the Authority on or before the stated time and date will be solely and strictly the responsibility of the Respondent. The Authority will in no way be responsible for delays caused by the United States mail delivery, common carrier or caused by any other occurrence.

7.3 Anti-Lobbying Provision

Except as provided above as to questions and clarifications concerning this RFP, during the pendency of this procurement prospective respondents may not directly or indirectly contact members of the Authority's Board of Directors, its employees, consultants, or contractors performing work for the Authority concerning the subject matter of this RFP. Violation of this restriction is grounds for disqualification from consideration.

7.4 Public Information Act; Release of Information

All Responses submitted to this RFP become the property of the Authority and may be subject to public disclosure under the Texas Public Information Act ("PIA"). Any material deemed by a Respondent to be proprietary, confidential, or otherwise exempt from disclosure under the PIA shall be clearly marked as such. It is not acceptable to designate all or substantially all of the response to the RFP as "confidential" or "proprietary," and any such response will be returned to the Respondent without further consideration by the Authority.

The Authority will notify the Respondent if a request for public information is received that may require the Authority to disclose any material in the Response that the Respondent has marked as proprietary, confidential, or otherwise exempt from disclosure under the PIA. The Authority does not have and does not assume any obligation to assert or argue on behalf of the Respondent that any information provided to the Authority is exempt from required disclosure.

7.5 Proposal Participants

Respondents may submit a Proposal either solely or in partnership with other firms.

7.6 Responsiveness of Proposals

The Authority reserves the right to reject any Proposal as non-responsive if the Proposal fails to include any of the required information.

7.7 Right to Cancel or Amend

The Authority reserves the right to cancel or amend this RFP if it is determined to be in the best interest of the Authority.

7.8 Request for Additional Information

The Authority may request additional information from the Respondents.

7.9 Responsibility for Costs

All costs incurred by any party in responding to this RFP shall be borne by that party. The Authority shall have no responsibility whatsoever for any associated direct or indirect costs.

8. Proposal Evaluation

The Authority will make its selection based on demonstrated competence, experience, knowledge, and qualifications, as well as the reasonableness of the fee compared to other vendors. A selection committee appointed by the Executive Director of the Authority will include representatives from the Authority, and may include representatives from various other organizations such as TxDOT, Williamson County, Travis County, the City of Austin, CAMPO and Capital Metro. The selection committee will score the proposals based on the pre-established criteria reflected in this RFP. The scores will be tallied and short-listed vendors will be invited to make oral presentations to the selection committee. Each vendor will be awarded additional points based on the quality of their oral presentation. A final score will be tallied and the committee will make a recommendation to the Executive Director regarding the most qualified vendor.

The Executive Director will then make a recommendation to the Authority Board of Directors regarding selection of a vendor. The ultimate selection of a firm or firms, if any, will be made by the Authority Board of Directors. The Authority has not committed itself to employ a Communication and Marketing Consultant, and neither the suggested scope of services nor the terms of an agreement should be construed to require that a Communication and Marketing Consultant will be employed for any or all of the services described in this RFP.

The Authority reserves the right to make those decisions, and the Authority Board's decision on these matters is final.

The Authority reserves the right to negotiate services to be provided and to reject any and all proposals. The vendor will be compensated for services rendered based on the hourly rates submitted as part of the proposal. Fees for outside services and sub consultant work will be negotiated on an individual basis. The Authority will not pay a mark- up for sub consultant services or third party charges including standard advertising commissions. The Authority is exempt from the payment of sales tax. It will be the responsibility of the successful vendor to invoice accordingly.

8.1 Evaluation Criteria

Scoring of Responses shall be based upon the following criteria:

Scoring Criteria	Points
Ability to successfully complete the tasks outlined in the Scope of Services	25
Successful management of similar contracts and projects	15
Experience of team members	10
Understanding of the Authority and its needs	5
Strategic vision and innovative concepts for provision of contract services	10
Diverse workforce with emphasis on HUB/DBE involvement	10
Rates	20
Oral Presentation	5

8.2 Attachment "A"- Rates

Position	Agency Employee/Subconsultant	Hours	Hourly Rate	Total
Agency Principal		120	\$	\$
Account Manager		240	\$	\$
Assistant Account Manager		360	\$	\$
Administrative Assistant		120	\$	\$
Copywriter/Editor		60	\$	\$
Creative Director		40	\$	\$
Community Outreach Specialist		240	\$	\$
Multi-Media Specialist		80	\$	\$
Graphic Designer		80	\$	\$
Total				\$