

Request For Proposal

**Workers' Compensation Board of Nova Scotia
Graphic Design Services**

Proposal #: 2010-01

Closing Date: 4 p.m., Feb 12, 2010

Proposal Opening Date: 2 p.m., Feb 13, 2010

Location: Workers' Compensation Board, 5668 South Street, Halifax

FAX OR EMAIL BIDS ARE NOT ACCEPTABLE

Request for Proposal

Workers' Compensation Board of Nova Scotia Graphic Design Services

About the WCB

The Workers' Compensation Board of Nova Scotia (WCB) is committed to keeping Nova Scotians safe and secure from workplace injury. The WCB provides workplace injury insurance for more than 18,000 employers and their 300,000 workers across the province. The WCB sets the standard for workplace injury insurance by informing and inspiring Nova Scotians in the prevention of workplace injury. If an injury occurs, we support those whose lives it touches by championing a timely return to safe and healthy work.

The WCB is funded entirely by premiums paid by registered employers. All employers in covered industries who have three or more employees are required to have workers' compensation coverage. Employees do not pay for workers' compensation insurance.

While not all employers in Nova Scotia are covered by the WCB, the WCB is responsible for promoting injury prevention information and education through social marketing to all employees and employers, and with targeting services to registered employers.

The WCB employs 350, with offices in Halifax and in Sydney.

For more information and as background, proponents are encouraged to visit our corporate website at www.wcb.ns.ca.

Our Vision

Nova Scotians – safe and secure from workplace injury.

Our Mission

We set the standard for workplace injury insurance. We inform and inspire Nova Scotians in the prevention of workplace injury, but if it occurs we support those whose lives it touches by championing a timely return to safe and healthy work.

Our Values:

Can-do Attitude

We will deliver on our promises and provide top-notch service to our customers and colleagues.

Safety Champion

We will be a champion for workplace safety through our relationships and innovative solutions, and by keeping prevention and return to work at the heart of our business.

Caring and Compassionate

We will strive to walk a mile in our customers' shoes. We will serve as we like to be served and provide our customers and colleagues with the respect and support they need to be successful.

Proposal Requirement

The WCB seeks a simplified, direct relationship with a talented and experienced graphic design professional to provide creative solutions for a variety of communications and marketing challenges and opportunities.

The goal is simple and straightforward: Quality work delivered on deadline, on brand, and at a reasonable cost.

The successful proponent will work within the WCB's brand guidelines to find creative applications and solutions for such design projects as the annual report, annual holiday cards, the quarterly community report, and newsletters. Additional design projects may arise for pieces such as posters, invitations, brochures, and event collateral materials.

Overall, there will be considerable room and requirement to recommend design approaches that adhere to the brand but that also offer creative, unique solutions to business challenges.

Service model

The WCB's Communications Team is comprised of nine marketing/communications professionals many of whom will from time-to-time, work directly with the successful proponent under an overall approach defined by our corporate communications strategy.

While, strategy development, production management, account management, and account coordination are not part of this particular proposal, there will be a requirement for the proponent to work directly with printers and advise on distribution and mailing solutions.

Administrative Requirements

The following terms apply to this Request for Proposal and to any subsequent contract. Submission of a proposal in response to this Request for Proposal indicates acceptance of all the following terms.

1.0 Introduction and Scope

1.1 Request for Proposal Terminology

Throughout this Request for Proposal, terminology is used as follows:

- a) "WCB" means the Workers' Compensation Board of Nova Scotia.
- b) "Contractor" means the successful proponent to this Request for Proposal who enters into a written contract with the Workers' Compensation Board of Nova Scotia;

- c) "must", "mandatory" or "required" means a proposal element that is to be met in a substantially unaltered form in order for the proposal to receive consideration;
- d) "Proponent" means an individual, proprietorship, partnership or corporation who submits, or intends to submit, a proposal in response to this Request for Proposal;
- e) "should" or "desirable" means a requirement having a significant degree of importance to the objectives of this Request for Proposal.
- f) "Graphic Design Services" means providing an estimate of the cost of the work, original initial design, presentation of proofs or layouts (usually, except on larger projects, by email PDF), revisions as required, and preparation of final artwork files.
- g) "Concept" means a unique creative design concept, based upon thematic direction and a creative brief from the WCB. More strategic than a simple design, a concept means interpreting thematic input and developing a unique idea for application throughout larger projects such as the annual report.

1.2 Purpose and Scope of Work

This Request for Proposal is issued by the WCB and requires the supplier to provide creative and professional graphic design services, of the various documents and publications used by the WCB.

Generally, the proponent will be required to:

- Understand, uphold and adhere all design to the WCB's brand, while providing creative solutions.
- Work closely with the WCB, and at times, other consultants, to deliver professionally designed materials based upon the WCB's brand. This includes graphic design, and at times, conceptual art direction services.
- Work with the WCB to ensure satisfactory completion of publications and within the pre-approved timeline and budget.
- Where necessary, ensure publications meet Canada Post requirements for mail distribution, including use of appropriate bar codes and indicia.
- Provide final artwork to printer selected by WCB in a format required by the printer, and review printer proofs for errors, although WCB has final responsibility for approval of proofs. The WCB contracts printing directly and printing is not included in this proposal.
- Cooperate with other creative consultants, photographers, writers, printers, or other WCB suppliers toward fulfillment of the WCB's communications goals.

- As required, incorporate design concepts developed by other suppliers into the publications being developed by the proponent.
- Provide a final PDF of all materials produced by email and the production artwork files on disk.
- Provide an estimate for individual jobs upon request.

Specifically, the proponent will be required to provide design services that include, but are not limited to, the following pieces. Include price up to provision of files to printer.

- Develop a concept and provide graphic design services for one **annual report**. See Schedule A for details.
- Develop a concept and provide graphic design services for one **annual holiday card**. See Schedule B for details.
- Provide graphic design services for:
 - o Three editions of the **Community Report**. See Schedule C for details.
 - o Two editions of the **Corporate Newsletter**. See Schedule D for details.
 - o **Rate Book**. See schedule E for details.
 - o **Various brochures**. See Schedule F for details.
 - o **Other design services** as required based on estimate. See Schedule G for details.

2.0 Request for Proposal Process and Procedures for Evaluation

2.1 Mandatory Requirements

Proposals not meeting all mandatory requirements will be rejected without further consideration.

2.2 Short List

The evaluation procedure may include a short list based on the stated criteria. The short listed proponents **may be** asked to prepare and make a presentation to the WCB on **Monday, Feb. 22 or Tuesday, Feb. 23, 2010** prior to a final proponent being chosen.

Should presentations be required as part of proposal evaluation, the evaluation process for the presentations will be explained in a separate communication with the short-listed proponents.

2.3 Evaluation Team

Evaluation of proposals will be conducted by an ad hoc team of WCB staff, including but not limited to the Communications Team.

2.4 Evaluation and Selection

The evaluation team will check proposals against the submission requirements listed in Section 3 below. Proposals meeting all these requirements will then be assessed and scored against the desirable criteria noted in Section 6.0. References of the proponent or proponents scoring the highest will be checked. If a reference check is satisfactory and the proponent has the appropriate WCB coverage, the WCB's intent is to enter into contract negotiations with the proponent who has the best overall value. Subject to successful negotiation and execution of a contract, this proponent will provide the required graphic design services.

2.5 Debriefing

Unsuccessful proponents will be notified of the results of the competition. However, limited details about the winning proponent will only be provided on request.

2.6 Negotiation Delay

If a written contract cannot be negotiated within 30 days of notification of the successful proponent, the WCB may, at its sole discretion, at any time thereafter, terminate negotiations with that proponent and either negotiate a contract with the next qualified proponent or choose to terminate the Request for Proposal process and not enter into a contract with any of the proponents.

3.0 Proposal Preparation

This section defines the proposal preparation and submission procedures, which are to be followed by all proponents. Proponents are cautioned to carefully read and follow the procedures required by this Request for Proposal, as any deviation from these requirements may be cause for rejection.

The proposal must be signed by the person(s) authorized to sign on behalf of the proponent and to bind the proponent to statements made in response to this Request for Proposal.

3.1 Proposal Format

Evaluation of proposals is made easier when proponents respond in a similar manner. The following format and sequence should be followed in order to provide consistency in proponent response and to ensure each proposal receives full consideration. All pages should be consecutively numbered.

While design of the proposal itself is absolutely acceptable, speculative design approaches of items covered in the proposal are not to be included.

- a) One page letter of introduction identifying the proponent, signed by the person or persons authorized to sign on behalf of, and bind the proponent to, statements made in the proposal.
- b) The body of the proposal should include, but is not limited to, the following:
 - o Introduction and any additional proponent background.
 - o A short explanation of the proponent's approach to workplace safety in their own workplace.
 - o A short explanation of the proponent's approach to graphic design, including:
 - i. The role of graphic design in an organization's brand and in meeting its overall business goals;
 - ii. The proponent's own business approach to the provision of design services, giving a sense of the working relationship with clients; and
 - iii. The proponent's requirements and expectations from the client.
 - o At least three (3) but not more than six (6) samples of graphic design work, including brief explanations as to the challenge presented, how the solution met that challenge, and the results. Results need not be quantitative in nature but should demonstrate the overall effectiveness of the solution.
 - o A brief outline of experience working with established brand standards.
 - o Curriculum vitae of the key individual(s) to be involved in fulfilling the requirements.
 - Itemized costing based on the general and specific requirements outlined in Section 1.2 Purpose and Scope of Work of the Request for Proposal, with explanation of services included at the prices quoted, and typical timelines for the project as described.
 - The proponent's standard hourly rate.
 - An overview of the proponent's billing process.
- c) Contact information including name, organization, telephone and email for three client references.
- d) Any additional skill sets or value offered you wish to highlight but which may not be included here.

- e) Any other background information may be included as appendices to your proposal.
- f) Full contact information including email address.

Proposal should not total more than 25 letter-size pages including all samples and appendices.

Proponents may include references to websites including samples of work.

3.2 Inquiries

Direct any inquiries related to this Request for Proposal to:

Heather MacLeod
Communications Advisor
heather.macleod@wcb.gov.ns.ca
Direct line (902) 491-8104

Questions will be answered as soon as possible directly to the proponent inquiring.

Information obtained from any other source is not official and may be inaccurate. Inquiries and responses may be recorded and distributed to all proponents at the WCB's option.

3.3 Proposal Changes and Amendments

If changes to the Request for Proposal, or any part thereof, are required, or if information is added to the Request for Proposal, or if the closing date is changed, all proponents will be notified in writing by the person indicated in Section 3.2 above.

If changes occur within five business days of the original closing date, the WCB may, at its discretion, extend the closing date.

3.4 Closing Date

The closing date is **4 p.m. Atlantic Standard Time on Friday, February 12, 2010.** Late proposals will be returned unopened to the proponent.

3.5 Submission Process

Submit **TWO** complete copies of your proposal, one bound, and one unbound.

Full colour is preferred for samples of work. The unbound copy need not be presented in colour, and is for purposes of duplication within the WCB for the proposal review committee.

Address proposals as follows:

Heather MacLeod
Communications Advisor
Communications Department
Workers' Compensation Board of Nova Scotia
5668 South Street
PO Box 1150
Halifax, NS B3J 2Y2

Do not send your proposals by facsimile or email.

Ensure the following is clearly visible on the external envelope:

- Proponent's name and return address
- The text "WCB GRAPHIC DESIGN SERVICES" and the TENDER NUMBER.

3.6 Opening Date

Proposals will be opened at the Workers' Compensation Board of Nova Scotia, 5668 South Street at **9:00 am on Monday, February 15, 2010.**

3.7 Additional Information

Proposals may contain additional information than that requested in the Request for Proposal.

3.8 Changes to Proposal after Closing

The proponent will not change the wording of its proposal after closing, and no words or comments will be added to the general conditions or detailed specifications unless requested by the WCB for purposes of clarification.

The proponent may change a previously submitted proposal by withdrawal, amendment or submission of a replacement if done prior to the proposal closing date and time. This information or request should be submitted in writing on company letterhead or equivalent and contain the signature of the individual submitting the original submission.

3.9 Proponents' Expenses

Proponents are solely responsible for their expenses in preparing, delivering or presenting a proposal and for subsequent negotiations with the WCB, if any.

3.10 Firm Pricing

Proposals must be open for acceptance for at least 90 days after the closing date. Upon acceptance, prices will be firm for the entire contract period, unless otherwise specified.

3.11 Currency and Taxes

Prices quoted are to be:

- a) In Canadian dollars
- b) Exclusive of all sales taxes

4.0 Additional Terms

4.1 Acceptance of Proposals

The WCB reserves the right to modify the terms of the Request for Proposal, at any time, at its sole discretion.

This Request for Proposal should not be construed as a contract to purchase goods or services. The WCB is not bound to accept the lowest price or any proposal of those submitted. Proposals will be assessed in light of the evaluation criteria.

Subsequent to the submission of proposals, interviews may be conducted with some of the proponents, but there will be no obligation to receive further information, whether written or oral, from any proponent.

The WCB will not be obligated in any manner to any proponent until a written contract has been duly executed relating to an approved proposal. A contract will not be duly executed if the proponent cannot provide appropriate WCB coverage.

Neither acceptance of a proposal nor execution of a contract will constitute approval of any activity or development contemplated in any proposal that requires any approval, permit or license pursuant to any federal, provincial, regional, district or municipal statute, regulation or by-law.

4.2 Definition of Contract

Notice in writing to a proponent of the acceptance of its proposal by the WCB and the subsequent full execution of a written contract will constitute a contract for the goods or services, and no proponent will acquire any legal or equitable rights or privileges relative to the goods or services until the occurrence of both such events.

4.3 Duration of Contract

The contract will be for 15 months, with a WCB option to extend the contract for two additional 12-month periods.

4.4 Proposals as Part of Contract

Proposals may be negotiated with proponents, and if accepted, may form part of a contract.

4.5 Liability for Errors

While the WCB has used considerable efforts to ensure an accurate representation of information of this Request for Proposal, the information contained in this Request for Proposal is supplied solely as a guideline for proponents. The information is not guaranteed or warranted to be accurate by the WCB, nor is it necessarily comprehensive or exhaustive. Nothing in this Request for Proposal is intended to relieve proponents from forming their own opinions and conclusions with respect to the matters addressed in this Request for Proposal.

4.6 Acceptance of Terms

All the terms and conditions of this Request for Proposal are assumed to be accepted by the proponent and incorporated into its proposal. Proponents who have obtained the Request for Proposal electronically must not alter any portion of the document, with the exception of adding the information requested. To do so will invalidate the proposal.

4.7 Financial Stability

The successful proponent may be required to demonstrate financial stability and may be required to register to conduct business in Nova Scotia.

4.8 Ownership of Proposals and Freedom of Information

All documents, including proposals, submitted to the WCB become the property of the WCB and are subject to disclosure under the Nova Scotia *Freedom of Information and Protection of Privacy Act*. By submitting a proposal, the proponent thereby agrees to public disclosure of its contents. Any information the proponent considers 'personal information' because of its proprietary nature should be marked as "confidential", and will be subject to appropriate consideration as defined within the Nova Scotia *Freedom of Information and Protection of Privacy Act*.

4.9 Use of Request for Proposal

This document, or any portion thereof, may not be used for any purpose other than the submission of proposals.

4.10 Confidentiality of Information

Information pertaining to this competition obtained by the proponent as a result of participation in this project is confidential and must not be disclosed without written authorization from the WCB.

4.11 Reciprocity

The WCB may consider and evaluate any proposals from other jurisdictions on the same basis that the government purchasing authorities in those jurisdictions would treat a similar proposal from a Nova Scotia supplier.

5.0 Contract Clauses

5.1 Registration with the Workers' Compensation Board

The contract may contain a provision that the contractor and any approved subcontractors must be registered with the WCB, in which case WCB coverage must be maintained for the duration of the contract. Prior to receiving any payment, the contractor may be required to submit a WCB Clearance Letter indicating that all WCB assessments have been paid.

5.2 Indemnity

The contractor will indemnify and save harmless the WCB, its employees and agents from and against all claims, demands, losses, damages, costs and expenses made against or incurred, suffered or sustained by the WCB at any time or times (either before or after the expiration or sooner termination of the contract where the same or any of them are based upon or arise out of or from anything done or omitted to be done by the contractor or by any servant, employee, officer, director or subcontractor of the contractor pursuant to the contract.

5.3 Insurance

The contract may contain a provision that the contractor will, without limiting its obligations or liabilities and at its own expense, provide and maintain throughout the contract term comprehensive general liability in an amount not less than \$1,000,000 inclusive, per occurrence, insuring against bodily injury, personal injury and property damage and including liability assumed under contract with insurers licensed in the province of Nova Scotia and in the forms and amounts acceptable to the WCB. All required insurance will be endorsed to provide the province with 30 days advance written notice of cancellation or material change. The contractor will, on demand, provide the WCB with evidence of the required insurance.

5.4 Contract Administrator

A main contact will be assigned by the WCB to oversee the contract. In addition the contractor will be expected to name a contact to liaise with the WCB on the activities associated with this contract.

5.5 Compliance with Laws

The contractor will give all the notices and obtain all the licenses and permits required to perform the work. The contractor will comply with all laws applicable to the work or performance of the contract.

5.6 Periodic Review and Extension

The contract will be subject to periodic review by the WCB. Should, in the sole opinion of the WCB, the contractor fail to provide satisfactory service, the WCB may choose to obtain services from another contractor.

6.0 Evaluation Criteria

The following criteria will form the basis upon which evaluation of proposals will be made:

- 40% Proponent professional experience, overall approach, and references.
- 40% Samples of work.
- 20% Price. (Provide individual prices for projects itemized in this Request for Proposal, as well as their total. Include, in addition, your hourly rate. Do not include taxes, but do include additional charges related to each job.

-END-

Schedule A Annual Report

The annual report is used to report our performance to stakeholders and the general public.

The WCB is legislated to present the Annual Report to the Minister of Labor and Workforce Development on March 31st, and strict adherence to a pre-approved timeline toward this legislated deadline is absolutely required. Generally, the initial concept is due in December of the preceding calendar year.

The WCB uses photography in varying degrees within the annual report, and for the purposes of this RFP, assume that photography is in hand. Though art direction of photo shoots may be required, this will be handled separately as we prepare for the project.

The annual report changes in format each year. The format, design, and approach of the annual report are functions of the creative concept, and this concept is part of the scope of this proposal.

Include in your quotation, time for development of a concept. In terms of the actual design and production, for the purposes of this quote, use the specifications from the [2008 Annual Report](#), as follows:

- 68 numbered pages plus cover
- 6 x 9, portrait
- Metal coil binding
- One PMS plus black
- May include photography, but art direction of photo shoots not included in quote
- May include illustrations, but illustration time not included in quote
- Includes text, graphs, and spreadsheets, including detailed financial information.
- View samples of [previous reports](#).

Schedule B Annual Holiday Cards

Each year the WCB produces a holiday card for approximately 1,000 of the WCB's customers and employees, including safety partners, MLAs and employers.

The objective of the card is to send a tangible greeting of goodwill with a workplace safety theme during the holiday season. It is signed by the WCB's CEO and Board Chair. Additionally, VPs and some directors receive copies to send to their contacts.

Creatively the direction is typically professional with a sense of fun, humour, and whimsy, while making the workplace safety connection.

In terms of the actual design and production, for the purposes of this quote, use the specifications from the 2009 holiday card, as follows:

- Quantity: 1,000
- Size: 6.25 x 9, folds to 6.25 x 4.5
- Stock: 100lb cougar cover white smooth finish
- May include photography, but art direction of photo shoots not included in quote
- May include illustrations, but illustration time not included in quote
- Colour: full colour one side, inside black plus 1 pms (There are three versions of the inside: 2 will have 1 pms and black and one will just have the 1 pms (pms is the same for all))
- Matching A6 Envelopes:
 - Printed 1 pms (just return address)
 - Overprint of recipient addresses for 1000 envelopes.

Schedule C **Community (Quarterly) Reports**

The Community Report is a regular report to stakeholders on performance during the previous quarter, including financial information. The Community Report must be presented to the Minister of Labour and Workforce Development within 90 days following the quarter. These deadlines are legislated requirements and strict adherence to them is absolutely required.

Quarter	Quarter ends	Report due in Minister's office	Design and print activities occur
Q1	March 31	June 30	May and June
Q2	June 30	September 30	August and September
Q3	September 30	December 31	November and December

The Community Report changes in format from time to time but, for purposes of this Request for Proposal, the specifications for the most recent report are used.

Based on the [Q3 2009 Community Report](#), please quote on the following information.

For the first issue, include the development of a masthead, and overall design approach in your quote.

- 6-8 numbered pages, self cover
- 8.25" x 11" in size (two 17" x 11" pages folded in half)
- Saddle stitch binding
- Full colour
- May include illustrations
- Does include text, photography (supplied), and graphs, and spreadsheets
- Design must be in keeping with the WCB brand.

Sample of previous design: http://www.wcb.ns.ca/wcbns/index_e.aspx?DetailID=945

Schedule D

Corporate Newsletter

The Safe & Secure newsletter is distributed twice a year to all business addresses in Nova Scotia, as well as to all WCB employees.

Typically one newsletter is issued in May/June, the second in October/November. Timeline will be agreed upon by designer and WCB in advance.

Based on the Volume 2009, No. 1 issue, please quote on the following information.

For the first issue, include the development of a masthead and overall newsletter design in your quote.

- 11 X 17 folded to 5.5 X 8.5
- Full Colour
- 60lb. Husky Text
- May include illustrations, but do not include illustration time
- Includes text, photography (supplied), graphs, spreadsheets.
- Design must be in keeping with brand guidelines.

Sample: [Volume 2009, No 1](#)

Schedule E Rate Book

The rate book is a listing of industries and their corresponding Standard Industrial Classification (SIC) Code and assessment rate, followed by a list of SIC Codes and their corresponding industry names and assessment rates (i.e., the same list sorted alphabetically and then numerically). The book is available online.

This is a text-driven, simple listing of industry codes and industry names, both alphabetically and numerically, used by employers and WCB staff as a guide to assessment rates. Readability and quick-reference is important.

The rate book changes in format from time to time but, for purposes of this Request for Proposal, the specifications for the most recent rate book are used.

Based on the 2009 Rate Book, please quote on the following information:

- 52 numbered pages plus cover
- 5.5" x 8.5" in size (8.5" x 11" pages folded in half)
- Saddle stitch binding
- Cover one PMS, text black
- Primarily text
- Design must be in keeping with the WCB brand.

Sample: [Rate Book 2009](#)

Schedule F Brochures

Specifications have been averaged based upon existing WCB print materials. Actual deliverables may vary, but please quote on the following information.

The proponent would develop one overall design approach which would then be applied and resized for the various brochures.

- **4 brochures, each being:**
 - 16 pages self cover
 - 6" x 9" (12" x 9" folded in half)
 - Saddle stitch binding
 - Full colour
 - May include photograph and illustrations (supplied)
 - Design must be in keeping with the WCB brand.
- **5 brochures, each being:**
 - 20 pages self cover
 - 3.5" x 8.5" in size (7" x 8.5" pages folded in half)
 - Saddle stitch binding
 - Full colour
 - May include photography and illustrations (supplied)
 - Design must be in keeping with the WCB brand.
- **7 brochures, each being:**
 - 3.5" x 8.5" (11" x 8.5" bifold – three panels), double-sided
 - Full colour
 - May include photography and illustrations (supplied)
 - Design must be in keeping with the WCB brand.

Various samples available under [Brochures and Publications](#)

Schedule G
Other graphic design services

From time-to-time the WCB requires graphic design services for production of materials not provided for in this Request for Proposal or in any subsequent contract. For example, event collateral, promotional cards, invitations, posters, envelopes, etc.

The WCB is bound by its own procurement guidelines. For smaller jobs, and procurement guidelines permitting, the WCB may hire a designer based on hourly rates or a quoted total fee.

For purposes of this Request for Proposal, please quote an hourly fee in addition to the detailed quotations as noted in other Schedules.