

REQUEST FOR QUOTATION

****THIS IS NOT AN ORDER****

Return Quotes To:

The University of Tennessee
Purchasing Department
5723 Middlebrook Pike
Knoxville, TN 37921

Vendor Address

Bidder # D99999
University of T
PARENT RFQ
UT TN

Information

Date: 05/28/2009
RFQ No: 6000036907
Collective No: 10032030
Return Quote By: 06/11/2009 3:00 pm
Promised Ship Date: (Furnish) _____
Payment Terms: (Furnish) _____
FOB UT Dest Unless Otherwise Specified Below

Buyer: Lisa Pate
Phone: 865-974-3101
Fax: 865-974-2973

Item	Quantity	UM	Material/Description	Price Per Unit	Net Amount
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This Request for Proposal (RFP) provides proposers with a formal and unrestrictive opportunity for their services to be considered. This process should not be confused with the process of competitive sealed bidding. The latter process is usually used where the goods and services being procured can be precisely described and price is generally the predominant factor. With an RFP, however, price is not required to be the determinative factor, although it may be, and the University has the flexibility to negotiate with the apparent successful proposer to arrive at an award. Any questions about this process or the requirements must be in writing and forwarded to Lisa Pate via fax at (865) 974-2973 or E-Mail lpate@tennessee.edu.

PROPOSAL SUBMISSION:

A. Proposals shall be submitted (one original and 6 copies) by Thursday, June 11, 2009, 3:00 P.M. Eastern Time to:

Lisa Pate
Purchasing Agent
Purchasing Dept
5723 Middlebrook Pike
Knoxville, TN 37921
Ph: 865-974-3101
Fax: 865-974-2973
E-Mail: lpate@tennessee.edu

The original proposal must be signed and dated by an individual authorized to enter into a binding agreement in the name of the contractor.

The proposal should be presented in a format that can easily be incorporated into a contract between the Proposer and the University of Tennessee encompassing the guidelines detailed in the RFP and required by the University.

00001

1 LOT

The University of Tennessee is seeking a

professional advertising agency, marketing firm, or qualified individual with knowledge of college marketing and expertise in conceptual and mechanical design per the attached documents. The agency, firm or individuals selected will

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			work with members of the University of Tennessee System Development, Alumni Affairs, and Public Relations offices on creation of the publications listed below. Please note this RFP does not include any printing of the materials.		

Manufacturer _____ # _____

Warranty _____

GENERAL PROPOSAL CONDITIONS: All University of Tennessee general Proposal conditions apply to this bid. To view these conditions, which include protest procedures, please visit website: http://purchasing.tennessee.edu/general_proposal_conditions_printer_friendly.htm If for some reason you are unable to access this website you may telephone (865) 974-3311 for a hard copy of these conditions.

SPECIAL PROPOSAL CONDITIONS**SPC-1 CONFLICT OF CONDITIONS**

In the event that there are any conflicts between the general Proposal conditions and these special proposal conditions the special proposal conditions shall take precedence.

SPC-2 SEALED PROPOSAL

The envelope in which proposals will be submitted should be identified by placing the required information on the outside of the envelope as follows: It is imperative that your name and address appear in the upper left corner of the envelope and that the collective number, due date and time of opening appear in the lower left corner. Bid openings shall be public, on the date and at the time specified on the bid form. All sealed bids must be received in the purchasing department on or before the date and hour specified for bid opening. Sealed bids that miss the deadline will be rejected and returned unopened or kept on file in the purchasing department. No qualifying letters or statements from vendors will be considered a justification for accepting late bids.

SPC-3 PROPOSALS MUST BE IN ACCORDANCE WITH SPECIFICATIONS

Proposers are cautioned that unless otherwise stipulated in their bids, it will be assumed that they are proposing in strict accordance with the specifications and will be required to strictly comply therewith. Any deviations whatever from the specifications must be fully set forth and itemized in detail in a letter accompanying the proposal. Generalized statements submitted with your proposal in order to avoid

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complying with this requirement in full detail will not be accepted.					

SPC-4 INTERPRETATIONS AND ADDENDA

Any questions concerning conditions and specifications should be directed to the purchasing department in writing no later than five (5) days prior to the bid opening. Inquiries must reference the date of bid opening and RFQ number.

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IF THE BIDDER TAKES EXCEPTION TO ANYTHING IN THE SPECIFICATIONS OR TERMS AND CONDITIONS THE EXCEPTION MUST BE LISTED BELOW IF NECESSARY. YOU MAY SUPPLEMENT YOUR COMMENTS WITH AN ATTACHEMENT LISTING YOUR EXCEPTIONS IF NO EXCEPTIONS ARE TAKEN. WRITE "NONE" IN THE AREA FURNISHED BELOW IF NO COMMENTS ARE FURNISHED. IT WILL BE ASSUMED THAT NO EXCEPTIONS ARE BEING TAKEN

CERTIFICATION: MY COMPANY IS CLASSIFIED AS A:

NOTE: It will be assumed that business category is large if no response is furnished

LARGE BUSINESS _____ SMALL BUSINESS _____ WOMAN OWNED _____

PLEASE INDICATE BELOW ONLY IF YOUR FIRM IS AT LEAST 51 PERCENT OWNED BY A MEMBER(S) OF THE FOLLOWING GROUPS

BLACK AMERICAN _____ HISPANIC AMERICAN _____ ASIAN PACIFIC AMERICAN _____ NATIVE AMERICAN _____ ASIAN INDIAN AMERICAN _____

IT IS UNDERSTOOD AND AGREED THAT THIS BID WHEN CERTIFIED BY AN AUTHORIZED SIGNATURE, SHALL CONSTITUTE AN OFFER WHICH WHEN ACCEPTED IN WRITING BY THE UNIVERSITY'S PURCHASING DEPARTMENT AND SUBJECT TO THE TERMS AND CONDITIONS OF SUCH ACCEPTANCE, WILL CONSTITUTE A VALID AND BINDING CONTRACT BETWEEN THE UNIVERSITY OF TENNESSEE AND THE BIDDER/CONTRACTOR SUBMITTING SUCH OFFERING

WE OFFER TO SELL TO YOU THE ABOVE MATERIAL(S) OR SERVICES AT THE PRICE AND TERMS SPECIFIED HEREON AND IN ACCORDANCE WITH THE UNIVERSITY'S GENERAL AND ANY SPECIAL BID CONDITIONS FURNISHED AND INCORPORATED INTO THIS DOCUMENT. ALL EXCEPTIONS, ALTERNATIVE MATERIALS, OR SPECIFICATIONS IF ANY HAVE BEEN CLEARLY INDICATED. IF YOU HAVE ANY QUESTIONS ABOUT THIS REQUEST FOR QUOTATION, CONTACT THE BUYER AT THE ADDRESS OR TELEPHONE NUMBER SHOWN ABOVE.

WHEN OFFERING A "NO BID", PLEASE INDICATE YOUR REASON(S) BELOW AND RETURN THIS INFORMATION WITH YOUR RESPONSE

_____ DO NOT HANDLE THIS TYPE EQUIPMENT _____ CANNOT MEET SPECIFICATIONS

_____ CANNOT MEET REQUIRED DELIVERY _____ MATERIALS NOT AVAILABLE

_____ OTHER (SPECIFY) _____

IN COMPLIANCE WITH THE REQUIREMENTS OF CHAPTER 878, PUBLIC ACTS OF 2006, THE CONTRACTOR HEREBY ATTESTS THAT THE CONTRACTOR SHALL NOT KNOWINGLY UTILIZE THE SERVICES OF AN ILLEGAL IMMIGRANT IN THE PERFORMANCE OF THIS CONTRACT AND SHALL NOT KNOWINGLY UTILIZE THE SERVICES OF ANY SUBCONTRACTOR WHO WILL UTILIZE THE SERVICES OF AN ILLEGAL IMMIGRANT IN THE PERFORMANCE OF THIS CONTRACT.

ALL FIRMS WISHING TO DO BUSINESS WITH THE UNIVERSITY MUST LIST THEIR FEDERAL TAX ID NO. OR SOCIAL SECURITY NO. (IF INDIVIDUAL) IN THE SPACE PROVIDED:
TAX ID OR SSN: _____

(Signature)

(Printed Name and Company Name)

(Telephone #, Toll free if available)

(E-Mail Address)

(Date)

(Title)

(FAX #)

(WEB Site Address)



THE UNIVERSITY of TENNESSEE

KNOXVILLE, CHATTANOOGA, MARTIN, TULLAHOMA, MEMPHIS

REQUEST FOR PROPOSAL

University of Tennessee System Development Office, Alumni Affairs and the Office of the Vice President for Public & Government Relations

DESCRIPTION OF PROJECT

The University of Tennessee is seeking a professional advertising agency, marketing firm, or qualified individual with knowledge of college marketing and expertise in conceptual and mechanical design. The agency, firm or individuals selected will work with members of the University of Tennessee System Development, Alumni Affairs, and Public Relations offices on creation of the publications listed below.

Objectives

(1) Maintain the integrity and brand image of the University of Tennessee through exceptional creative work; (2) Work with members of the UT System Development, Alumni Affairs, and Public Relations offices to improve the overall look, feel, and message of the deliverables and to identify new opportunities for their uses; (3) Meet all deadlines; and (4) Maintain flexibility in being able to accommodate revisions.

Publications:

There are three categories listed below. The first requires creative conceptual design from a list of planned publications. The second requires mechanical design (updating copy and images from an existing template) from a list of planned publications. The third accounts for unplanned projects that most likely will require creative conceptual design and layout.

Unless otherwise noted, samples of these publications may be acquired from the University of Tennessee Purchasing office located at 5723 Middlebrook Pike in Knoxville, TN 37921. If you are located outside of the Knoxville area, please call the UT Purchasing Office at (865) 974-3311 and ask for Sharon Mount.

(1) Conceptual Creative Design

Annual Report of the President- Public Relations

- Annual publication due October 1, 2009
- Copy provided by Public Relations
- Specs and pages will depend on copy and conceptual design

UT Foundation Annual Report- Development (no sample)

- Annual publication due August 31, 2009
- Copy and images provided by Development

- Specs and pages will depend on content and conceptual design (approximately 24 pages+ cover)

Leaders in Philanthropy- Development

- Annual publication due May 2010 and June 30, 2010
- Copy and images provided by Development
- Specs will depend on content and conceptual design (approximately 100 pages)

College/Campus Fund Appeals- Alumni Affairs (no sample)

- Due: 1st series August-September 2009/ 2nd series October-November 2009
- Direct mail piece using variable data (letter, mailing envelope, reply card and reply envelope)
- Copy and images (as needed) to be provided by System Annual Giving staff
- Segmented by campus and college; 25-30 different text versions

Year-End Mailing –Alumni Affairs

- Annual publication mailed in November 2009
- Direct mail solicitation piece
- Copy and images (as needed) to be provided by System Annual Giving staff
- Mailing to include appeal letter with attached reply card (6½" x 6½"), outside window envelope (approximately 7½" x 4") and reply envelope

UTAA Fund for the Future Appeal –Alumni Affairs

- Annual publication mailed in February 2010
- Direct mail solicitation piece
- Copy and images (as needed) to be provided by System Annual Giving staff
- Mailing to include tri-fold appeal (6" x 9") with inside variable data salutation and outside variable data addressing
- Mailed as tabbed self-mailer and included #9 reply envelope

Library Mailing –Alumni Affairs

- Due = Mailed in May-June 2010 as requested by campus/collegiate staffs
- Direct mail solicitation piece
- Copy and images (as needed) to be provided by System Annual Giving staff
- Mailing represents various specialty fund appeals which are coordinated at the System Annual Giving level in conjunctions with campus and collegiate requests
- Consists of letter, mailing envelope, reply card, reply envelope

Flash Emails –Alumni Affairs (no sample)

- Five to ten (5–10) flash emails to alumni population that are sent during the course of the year
- Images, text and general concept provided by system-wide alumni
- Specific design and conceptual development provided by outside firm

Leadership Annual Giving –Alumni Affairs (no sample)

- Due = September 2009 production
 - Bi-fold or tri-fold brochure targeting donors of \$1,000 (+)
 - Can be used as a stand-alone piece or as a direct mail
 - Copy and images (as needed) to be provided by System Annual Giving staff
 - Can be used as stand alone piece or as a direct mail solicitation
 - Consists of brochure, reply card, mailing envelope
-

(2) Mechanical Design Creative

Achievement-Gifts in Action (campaign magazine)- Development

- Due = January 2010
- Copy and images provided by Development
- Specs: 24 pages plus cover; 17" x 11" folded once and stapled for self-mailing

Tennessee Legacies (gift & estate planning newsletter)- Development

- Due August 2009 and December 2009
- Copy and images provided by Development
- Specs = 8 pages, three 11" x 17" pages folded once to 8.5" x 11" and folded again for self-mailing

ContribUTIONS Newsletter (volunteer leadership recognition)- Development

- Due November 2009
- Copy and images provided by Development
- Specs = 12 pages, three 11" x 17" pages folded once to 8.5" x 11" for self mailing

Gratia Newsletter (campaign leadership/leadership recognition)- Development

- Due January 2010
- Copy and images provided by Development
- Specs = 10 pages, two 20" x 17" pages folded once to 10" x 17" and folded again to 10" x 8.5" for self-mailing (one 10" x 17" page added in middle)

Report of Accomplishments: Office of Audit and Consulting Services- Public Relations

- Annual publication due April 2, 2010
- Copy and images provided by Public Relations
- Distribution = Board of Trustees (less than 100)
- Specs: Finished size: 8.25" W x 11" H
28 pages, plus cover (32 total pages)
Cover stock: 160 lb. C2S
Ink: 4-color process
Bleeds: full bleed cover, no bleed text pages
Binding: saddle-stitch (staples)

Treasurer's Report- Public Relations

- Annual publication due April 1, 2010

- Copy and images provided by Public Relations
- Specs= Finished size: 8.5"W x 11" H
32 pages, plus cover (36 total)
Cover stock: 160 lb. CS2
Text stock: 80 lb (uncoated)
Ink: 2-color over 2-color
Bleeds: full bleed cover, no bleed text pages
Binding: saddle-stitch (staples)

Alumni Pocket Calendar –Alumni Affairs

- Annual project mailed in August 2009
- Direct mail solicitation piece using variable data
- Copy and images (as needed) to be provided by System Annual Giving staff
- Calendar 15-month, 6½" x 3¾" and contains 21 pages
- Outside cover will have five different versions/designs
- Mailing to include cover letter with reply card (8½" x 14"), outside envelope, reply envelope

UTAA Address Label Appeal –Alumni Affairs

- Annual project mailed in April 2009
- Direct mail solicitation piece
- Copy and images (as needed) to be provided by System Annual Giving staff
- Mailing to include 7" x 10" two-color letter, 13½" x 9½" self-adhesive return address labels with integrated reply form, A-8 window envelope and A-7 reply envelope

New Year's Card –Alumni Affairs

- Annual project mailed at the end of December 2009
- Holiday-style card to alumni leaders
- Copy and images (as needed) to be provided by System Alumni staff
- Consists of card and mailing envelope

Tour Preview Event Postcard –Alumni Affairs

- Due = delivered by April 1, 2010
- Postcard mailer to advertise tour preview event
- Copy and images (as needed) to be provided by System Alumni staff

Alumni Tour Program Insert –Alumni Affairs

- Due = August 2009
- Tour program promotional insert placed inside *Tennessee Alumnus*
- Four (4) pages, front and back (8 pages of copy/layout)
- Page size is 8" x 11"
- Copy and images (as needed) to be provided by System Alumni staff

Women's Council Leadership Seminar Brochure –Alumni Affairs

- Due = August 15, 2009 delivery
- Tri-fold brochure (3½" x 8½" folded)
- Copy and images (as needed) to be provided by System Alumni staff
- Mailing envelope

Women's Council Leadership Seminar Flyer –Alumni Affairs

- Due = August 15, 2009 delivery
- One (1) sheet (8½" x 11"); copy on both sides and images (as needed) to be provide by System Alumni staff

(3) *Unplanned projects and initiatives*

- Various projects will arise throughout the course of the year
- System-wide Development, Alumni Affairs and Public Relations will provide content and copy as needed
- UT and the agency/firm/individual chosen for the design work will be responsible for agreeing upon a reasonable timeframe for completion of projects
-

Timeline

[NOTE: The below timeframe reflects the current year through June 30, 2010.]

**** Alumni Flash Emails: 5-10 throughout the year

June 30 2009: begin design of Development's UT Foundation Annual Report; begin placement of text and photos in ContribUTions Newsletter template and Tennessee Legacies

August 1, 2009: due = Development's Tennessee Legacies (summer)

August 15, 2009: due = Alumni's Women's Council Leadership Seminar Brochure delivered

August 31, 2009: due = Development's UT Foundation Annual Report

August 2009: due = Alumni's Pocket Calendar mailed

August-September 2009: due= Alumni's College/Campus Fund Appeals

September 2009: due = Alumni's Leadership Annual Giving production; Alumni's Tour Program to Alumnus

October 2009: due = PR's Annual Report of the President; Alumni's College/Campus Fund Appeals

November 2009: due = Development's ContribUTions (winter) newsletter; Alumni's Year-End Mailing; Alumni's UTAA Fund for the Future Appeal mailed

December 2009: due = Development's Tennessee Legacies (winter) newsletter; Alumni's New Year's Card mailed
January 2010: due = Development's Achievement (winter) magazine
February 2010: due = Development's Gratia newsletter
April 1, 2010: due = Alumni's Tour Preview Event Postcard delivered
April 2010: due = PR's Treasurer's Report & Auditing Report, Development's Leaders in Philanthropy; Alumni's Address Label Appeal mailed
May-June 2010: due = Alumni's Library Mailing
May 2010: due = Development's Leaders In Philanthropy
June 30, 2010 due = Development's Leaders In Philanthropy

PREPARING THE PROPOSAL NARRATIVE

The proposal should include a narrative with the following components in the order indicated:

Section A. Outline the resources your firm has to accomplish the tasks and services indicated.

- 1) Include detailed information relating to your agency's/firm's organization and personnel.
- 2) Provide, as an attachment to the proposal, a bio or resume of the person the agency/firm/individual proposes as the liaison with UT and coordinator of the project(s), and if applicable, bios or resumes of other personnel who would have major responsibility for project work.
- 3) Describe the agency's/firm's/individual's experience successfully creating design work for colleges and/or universities.
- 4) Provide, as an attachment to the proposal, a list of at least three references with contact information of clients to whom your agency/firm/operation has provided similar services.

Section B.

Provide samples of work.

- 1) Include any design work completed for colleges and/or universities.
- 2) Include any design work that demonstrates expertise in conceptual thinking and design.

Section C. (Note that this section of the proposal should be submitted under separate cover).

Outline your cost structure.

- 1) Please provide classifications and hourly rates for proposed team members necessary to complete the publications and identify any additional related costs.
- 2) Include a schedule of proposed payments for the tasks and services proposed.
- 3) Provide a total cost for all listed publications.

ADDITIONAL INFORMATION

The University reserves the right to reject any and all proposals, waive any informalities in the proposals received, and accept any proposal that, in its opinion, may be in the best

interest of the University. The University may select at a minimum the top 5 highest point receivers and may assign the publications listed here to those vendors who the University feels is most qualified to complete the designated projects. The finalists will be notified and a meeting with the appropriate UT representatives will be scheduled.

Payments under the contract will be made after an invoice is submitted for performance of the services according to the schedule agreed upon by the University and the selected firm or individual. The final payment will be made after all services are completed as outlined in the agreement. Unbudgeted expenses/costs will not be paid.

The contract duration will be one year (July 1, 2009-June 30, 2010), with the option of renewing the contract for an additional year if both parties agree upon the renewal, and a third year if both parties agree upon the second renewal.

EVALUATION CRITERIA FOR SELECTION

The following criteria will be used to determine the agency, firm, or individual selected:

Resources of agency, firm	100 points
Adequacy of agency's/firm's/individual's resources, organization and personnel as described in Section A of the proposal narrative and applicable attachments	40 points
Experience and capability of liaison/coordinator and project staff as reflected in bios or resumes attached to the proposal	40 points
Agency's/firm's/individual's experience in design work for colleges and/or universities	20 points
Sample work/portfolio	110
Agency's/firm's/individual's experience of success in creative design implementation	
Cost	140
Ability to meet proposed timeline	75
Recommendations of references	75
Total Points	500