

STATE OF COLORADO



**REQUEST FOR PROPOSAL COVER SHEET & SIGNATURE PAGE**

**Date:** 10/14/2009

**RFP Number:** RFP-PVR-00001-10

**Submit Sealed Proposals to:** Department of Personnel & Administration  
State Purchasing Office  
633 17<sup>th</sup> Street, Suite 1520  
Denver, CO 80202-3609  
11/16/2009

**Purchasing Agent:** Peter Van Ronk

**RFP Submission Deadline:** 2:00 p.m. (Mountain Time)  
Caution: Daily mail may not be received prior to 4 pm. Vendors are responsible to ensure timely receipt.

**Number of Copies:** One Original plus  
\_\_\_\_ Hard Copies and  
One Electronic Copy  
on CD/Disk  
Required

All Bids Shall be Quoted F.O.B. Destination unless Otherwise Specified

*Colorado Historical Society Marketing, Advertising, Public Relations and Web Site Redesign  
Request for Proposal*

Per the attached specifications, terms and conditions

**F.E.I.N.:** \_\_\_\_\_

**Payment Terms:**  
**(Minimum of Net 30)** \_\_\_\_\_

**Delivery Date:** \_\_\_\_\_

**Authorized Signature:** \_\_\_\_\_

**Typed/Printed Name:** \_\_\_\_\_

**Title:** \_\_\_\_\_

**Company Name:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**City:** \_\_\_\_\_ **State:** \_\_\_\_\_ **Zip:** \_\_\_\_\_

**Phone Number:** \_\_\_\_\_ **Fax Number:** \_\_\_\_\_

**Contact for Clarifications:** \_\_\_\_\_

**Title:** \_\_\_\_\_

**Phone Number:** \_\_\_\_\_ **Fax Number:** \_\_\_\_\_

**E-mail Address:** \_\_\_\_\_

**IMPORTANT:** The following information must be on the outside of the Bid Return Envelope:

*Bid Number -Opening Date and Time*

Please be advised that telegraphic or electronic bids (Fax, Western Union, Telex, e-mail, etc.) cannot be accepted in the Purchasing Office as a sealed proposal. Offerors are urged to read the solicitation document thoroughly before submitting a proposal. Offerors are required to submit Federal Employer Identification Number (F.E.I.N.) prior to payment from the State of Colorado.

\_\_\_\_ Confirm that you are aware that the award notice will be published on BIDS.  
My company is registered on Colorado BIDS. \_\_\_\_Yes \_\_\_\_No

**THIS PAGE MUST BE COMPLETED, SIGNED AND RETURNED WITH RESPONSE**

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## **Section 1 – Administrative Requirements**

### **1.1 Official Means of Communication**

During the solicitation process for this RFP, all official communication with Offerors will be via notices on Colorado's *BIDS* system. Notices may include any modifications to administrative or performance requirements, answers to inquiries received, clarifications to requirements, and the announcement of the apparent winning offeror. ***It is incumbent upon Offerors to carefully and regularly monitor BIDS for any such notices.***

### **1.2 Bid Information and Distribution System (BIDS) and Registration**

This solicitation is published using the Colorado Bid Information and Distribution System (BIDS). Offerors must be registered on BIDS in order to download solicitation documents and information and to be considered responsive at the time of proposal submission. BIDS and its registration information may be linked through the State Purchasing Office link at <http://www.gssa.state.co.us>.

### **1.3 Structure of this Request for Proposal**

The State of Colorado Solicitation Instructions and Terms and Conditions linked through the BIDS Solicitation Page govern except as modified or supplemented in these instructions.

### **1.4 RFP Cancellation**

The State reserves the right to cancel this entire Request for Proposal or individual phases at any time, without penalty.

### **1.5 Scope of the RFP/Basis for Award**

The purpose of this Request for Proposals (RFP) is to solicit proposals to establish a contract with one or more organizations experienced in providing Advertising and Public Relations Services. A non-numeric evaluation will be conducted, and award will be made to the Offeror whose proposal is determined to be most advantageous to the State considering the evaluation factors set forth in Section 6 below.

### **1.6 Number of Awards**

The State may award one or more contract(s) as a result of this RFP.

### **1.7 Term of the Contract**

This RFP will result in one or more multiple year contracts for periods not to exceed three years. The initial contract will be effective upon approval by the State Controller for one year. The contract may be renewed for two additional one-year periods, at the sole discretion of the State, contingent upon contractual requirements being satisfied and funds being appropriated, budgeted, and otherwise made available.

### **1.8 Issuing Office**

This Request for Proposal (RFP) is issued for the Colorado Historical Society by the Colorado State Purchasing Office, Department of Personnel & Administration. The agency below is the sole point of contact concerning this RFP. Offerors should not contact any other state office or individual regarding this RFP or this project.

## **1.9 Inquiries**

Offerors may make email, written or fax inquiries concerning this RFP to obtain clarification of requirements. No inquiries will be accepted after the date and time indicated in the Schedule of Activities. The State Purchasing Office prefers that all inquiries be sent by electronic mail with the RFP number in the subject line to:

peter.vanronk@state.co.us

State Purchasing Office  
633 17<sup>th</sup> Street, Suite 1520  
Denver, Colorado 80202-3609  
Fax: (303) 866-6016  
RFP No: RFP-PVR-00001-10

Address written or fax inquiries to: Peter Van Ronk

Response to offeror's inquiries (if required) will be published as a modification on the BIDS system in a timely manner. Offerors should not rely on any other statements, either written or oral, that alter any specification or other term or condition of the RFP during the open solicitation period. Offerors should not contact any other state office or individual regarding this RFP or this project. Offerors are responsible for monitoring BIDS for publication of modifications to this solicitation.

## **1.10 News Releases**

News releases pertaining to this RFP shall NOT be made prior to execution of the contract without prior written approval by the State.

## **1.11 Proposal Submission/Copies**

Detailed instructions on proposal preparation and submission are in Sections 5 and 6. It is the responsibility of the Offeror to ensure that the Colorado State Purchasing Office receives the proposal on or before the proposal opening date and time, regardless of the delivery method used. Caution: Daily mail may not be received prior to 4 pm. Vendors are responsible to ensure timely receipt. Telegraphic or electronic proposals (fax, e-mail, etc.) will not be accepted.

The State of Colorado Request for Proposal Cover Sheet MUST be signed in ink, preferably in blue, by the Offeror or an officer of the Offeror legally authorized to bind the Offeror to the proposal. Proposals that are determined to be at a variance with this requirement may not be accepted.

## **1.12 Proprietary/Confidential Information**

Any restrictions of the use or inspection of material contained within the proposal shall be clearly stated in the proposal itself. Written requests for confidentiality shall be submitted by the Offeror with the

proposal. The Offeror must state specifically what elements of the proposal are to be considered confidential/proprietary and must state the statutory basis for the request under the Public (open) Records Act. (Section 24-72-201 *et seq.*, C.R.S.). Confidential/Proprietary information must be readily identified, marked and separated/packaged from the rest of the proposal. Co-mingling of confidential/proprietary and other information is not acceptable. Neither a proposal, in its entirety, nor proposal price information will be considered confidential and proprietary. Any information that will be included in any resulting contract cannot be considered confidential.

The Colorado State Purchasing Office will make a written determination as to the apparent validity of any written request for confidentiality. In the event the Colorado State Purchasing Office does not concur with the offeror's request for confidentiality, the written determination will be sent to the offeror. Ref. Section 24-72-201 *et. seq.*, C.R.S., as amended, Public (open) Records Act.

Offeror(s) acknowledge that they may come into contact with confidential information contained in the records or files of the State in connection with any resulting contract or in connection with the performance of its obligations under any resulting contract. The awarded Offeror(s) shall keep such records and information confidential and shall comply with [specific statutory citations (if any) and,] all laws and regulations concerning the confidentiality of such records to the same extent as such laws and regulations apply to the State. The awarded Offeror(s) shall notify its employees that they are subject to the confidentiality requirements as set forth above, and shall provide each employee with a written explanation of the confidentiality requirement before the employee is permitted access to confidential data. Awarded Offeror(s) shall provide and maintain a secure environment that ensures confidentiality. The confidentiality of all information will be respected and no confidential information shall be distributed or sold to any third party nor used by awarded Offeror(s) or its assignees and/or subcontractors in any way except as authorized by this contract. Confidential information shall not be retained in any files or otherwise by awarded Offeror(s). Disclosure of such information may be cause for legal action against the awarded Offeror(s). Defense of any such action shall be the sole responsibility of the awarded Offeror(s). Unless directed otherwise, awarded Offeror(s) is required to keep all State information in a secure, confidential manner.

### **1.13 RFP Response Material Ownership**

The State of Colorado has the right to retain the original proposal and other RFP response materials for its files. As such, the State of Colorado may retain or dispose of all copies as is lawfully deemed appropriate. Proposal materials may be reviewed by any person after the "Notice of Intent to Make an Award" letter(s) has/have been issued, subject to the terms of Section 24-72-201 *et seq.*, C.R.S., as amended, Public (open) Records. The State of Colorado has the right to use any or all information/material presented in reply to the RFP, subject to limitations outlined in the clause, Proprietary/Confidential Information. Offeror expressly agrees that the State may use the materials for all lawful State purposes, including the right to reproduce copies of the material submitted for purposes of evaluation, and to make the information available to the public in accordance with the provisions of the Public Records Act.

#### **1.14 Acceptance of Proposal Content**

The contents of the proposal and the terms of this request for proposals will become contractual obligations of the successful offeror.

#### **1.15 Proposal Prices and Payment Schedule**

Prices are expected to be firm, fixed price, with payment due at milestones as defined in this request for proposals. Estimated proposal prices are not acceptable, pricing must be United States funds. Proposals submitted must include all related costs, examples surcharges, travel, etc., any costs not included as part of the proposal will be disallowed. **VENDORS NEED TO BE AWARE THAT FUNDING IS AVAILABLE FOR PHASE I. PHASE II WILL BE BASED ON THE ACQUISITION OF FUNDING AS PART OF THE COLORADO HISTORICAL SOCIETIES ONGOING CAPITAL CAMPAIGN.**

#### **1.16 Selection of Successful Proposal and Notice of Intent to Award**

The State reserves the right to make an award on receipt of initial proposals, so Offerors are encouraged to submit their most favorable proposal at the time established for receipt of proposals. Offerors not meeting the requirements identified in the RFP shall be ineligible for further consideration. The State may conduct discussions with Offerors in the competitive range for the purpose of promoting understanding of the State's requirements and the offeror's proposal, to clarify requirements, make adjustments in services to be performed, and in prices. Changes to proposals, if permitted, will be requested in writing from offerors.

Upon review and approval of the evaluation committee's recommendation for award, the Colorado State Purchasing Office will issue "Notice of Intent to Make an Award" letter(s) to all offerors. In addition, an intent to award will be posted on the BIDS system.

Section 8 provides additional information related to the evaluation and award of this solicitation.

#### **1.17 Parent Company**

If an Offeror is owned or controlled by a parent company, the name, main office address and parent company's tax identification number shall be provided in the proposal.

#### **1.18 Certification of Independent Price Determination**

**1.18.1** By submission of this proposal each Offeror certifies, and in the case of a joint proposal each party, thereto, certifies as to its own organization, that in connection with this procurement:

**a)** The prices in this proposal have been arrived at independently, without consultation, communication, or agreement, for the purpose of restricting competition, as to any matter relating to such prices with any other Offeror or with any competitor;

**b)** Unless otherwise required by law, the prices which have been quoted in this proposal have not been knowingly disclosed by the Offeror and will not knowingly be disclosed by the Offeror prior to opening, directly or indirectly to any other Offeror or to any competitor; and

**c)** No attempt has been made or will be made by the Offeror to induce any other person or firm to submit or not to submit a proposal for the purpose of restricting competition.

**1.18.2** Each person signing the Request for Proposal Cover Sheet of this proposal certifies that:

**a)** He/She is the person in the offeror's organization responsible within that organization for the decision as to the prices being offered herein and that he has not participated, and will not participate, in any action contrary to (1)(a) through (1)(c) above; or

**b)** He/She is not the person in the offeror's organization responsible within that organization for the decision as to the prices being offered herein but that he has been authorized in writing to act as agent for the persons responsible for such decision in certifying that such persons have not participated, and will not participate, in any action contrary to (1)(a) through (1)(c) above, and as their agent does hereby so certify; and he has not participated, and will not participate, in any action contrary to (1)(a) through (1)(c) above.

**1.18.3** A proposal will not be considered for award where (1)(a),(1)(c),or (2) above has been deleted or modified where (1)(b) above has been deleted or modified, the proposal will not be considered for award unless the Offeror furnishes with the proposal a signed statement which sets forth in detail the circumstances of the disclosure and the head of the agency, or his designee, determines that such disclosure was not made for the purpose of restricting competition.

## **1.19 Standard Contract**

Except as modified herein, the standard State Contract Terms and Conditions and the Model Contract (attached separately on BIDS) included in this RFP shall govern this procurement and are hereby incorporated by reference. Please note this Model Contract lists the State's required legal provisions but does not include the specific scope of work and requirements for this RFP.

The Offeror is expected to review the attached Model Contract and note exceptions. Offerors agreeing to abide by the requirements of the RFP are also agreeing to abide by the terms of the Model Contract. Unless the Offeror notes exceptions in its proposal, the conditions of the Model Contract will govern. It may be possible to negotiate some of the wording in the final contract, however there are many provisions, such as those contained in the Special Provisions pages, that cannot be changed. Vendors are cautioned that the State believes modifications to the standard provisions, terms and conditions, and Special Provisions constitute increased risk to the state and increased costs. Therefore, the scope of requested exceptions is considered in the evaluation of proposals.

## **1.20 Legislative Changes**

The State of Colorado reserves the right to amend the contract in response to legislative changes that affect this project.

### **1.21 Order of Precedence**

In the event of any conflict or inconsistency between terms of this request for proposal and the offer, such conflict or inconsistency shall be resolved first, by giving effect to the terms and conditions of the contract, second to the request for proposal, and third, to the proposal.

### **1.22 Venue**

The parties agree that venue for any action related to performance of this contract shall be in the City and County of Denver, Colorado.

### **1.23 Audit**

The successful Offeror may be required to have a process audit conducted of the program at least once every three years. If the successful Offeror has not had such an audit prior to awarding of this contract, one may be required to begin within six months of the award of this contract. A complete copy of the audit must be provided to the project manager as identified in the final contract within five working days of its completion. The State will negotiate directly with the Offeror regarding any exceptions or findings from the audit.

## Section 2 – Schedule of Activities & Inquiries

### 2.1 Schedule Of Activities

### Deadline (Mountain Times)

- |                                                                                                                  |                                             |
|------------------------------------------------------------------------------------------------------------------|---------------------------------------------|
| 1. RFP Notice Published On The Bids System<br><a href="http://www.gssa.state.co.us">www.gssa.state.co.us</a>     | <u>10/14/2009</u>                           |
| 2. Prospective Offerors Written Inquiry Deadline<br>(No Questions Accepted After This Date/Time)                 | <u>10/22/2009</u> 5:00 PM                   |
| 3. Pre-Proposal Conference<br>Proposal Submission Deadline                                                       | <u>[Not Applicable]</u>                     |
| 4. (One Original plus 8 Hard Copies & One Electronic Copy<br>on CD/Disk Required)                                | <u>11/16/09</u> 2PM<br>MDT                  |
| 5. Oral Presentations/Site Visits ( <b>Held at State's<br/>Discretion</b> )                                      | <u>To Be Determined</u><br>T<br>H<br>R<br>U |
| 6. Contract Award (initial year - estimated)                                                                     | <u>01/13/10</u> U <u>11/1/12</u>            |
| 7. The Resulting Contract May Be Renewed For <u>2 Additional Years</u> , At The Sole Discretion Of The<br>State. |                                             |

## **Section 3 – Background Information**

### **3.1 Background**

Founded in 1879, the Colorado Historical Society brings the unique character of Colorado's past to more than a million people each year through historical museums and highway markers, exhibitions, manuscript and photograph collections, popular and scholarly publications, historical and archaeological preservation services, and educational programs for children and adults. A nonprofit agency with its own membership, the Society is also a state institution located within Colorado's Department of Higher Education.

As the designated steward of Colorado history, the Colorado Historical Society aspires to engage people in our State's heritage through collecting, preserving, and discovering the past in order to educate and provide perspectives for the future. The Colorado Historical Society consists of the State Historical Fund, the Office of Archaeology and Historic Preservation, 12 museums and historic sites statewide, and the collections and stewardship activities for more than 125,000 artifacts and eight million historical documents, including books, maps, photographs, diaries, and newspapers held in trust for all of Colorado's people. From these historical treasures and tools of knowledge, we prepare exhibitions, publications, and educational programs.

In 2012, the Colorado Historical Society is relocating its headquarters and the Colorado History Museum to a new location just south of its current home. The new History Colorado Center will provide an educational gateway into Colorado's history and serve as the hub for preservation, education and stewardship activities statewide. During this transition to the new building, the Colorado Historical Society will undergo a brand transformation as we move forward in adopting our current consumer brand of History Colorado as the overall brand and DBA for the Colorado Historical Society, encompassing all facets of the organization.

The Colorado Historical Society proposes to hire an agency to effectively and efficiently build public awareness and support of the Society's museums, sites and programs, will assist in a successful transformation to the History Colorado brand, and who will design and develop a creative campaign and the materials to promote the public opening of the new History Colorado Center. It is the desire of the Colorado Historical Society to select the most qualified agency in order to provide professional marketing, advertising, public relations and promotional services to assist the organization these efforts.

### **3.2 Purpose**

The Colorado Historical Society is seeking a full-service advertising agency to work collaboratively as a partner in producing successful advertising and public relations services to meet the public awareness, marketing, and branding goals for the Society over the next three years, as related to the capital campaign and public opening of the History Colorado Center. The primary objective of this work is to satisfy the current and emerging needs that cannot be met through Colorado Historical Society in-house personnel.

The purpose of this Request for Proposal (RFP) is to obtain competitive proposals from qualified agencies to provide marketing strategies, creative production materials, efficient media buys, creative public relations, and dynamic website design and development for the Colorado Historical Society. The contractor may subcontract for services, if they are not available in-house, and this should be described within the proposal.

The Colorado Historical Society reserves the right to contract separately for services as needed. The contractor will be required to meet the needs of a Colorado Historical Society marketing, advertising and promotional campaign for the period from the date of execution of the contract through October 1, 2012. The budget through October 2012 may be up to \$350,000. This includes marketing, advertising, public relations, and promotions for both the local Denver market as well as a statewide campaign.

### **3.3 Definition of Terms**

*Term of Contract:* 3-year contract beginning 01/13/10 and ending 11/1/2012 with an initial first year and two (2) optional 1-year renewals.

## **Section 4 – Statement of Work**

The Contractor's primary responsibility is to develop and implement marketing programs following direction provided by History Colorado. Public relations assistance in support of overall marketing objectives is also expected on an as-needed/limited basis. History Colorado will include the Contractor in phases of marketing planning and idea generation in order to provide the agency with as much information as possible and to benefit from the Contractor's experience, creativity, and knowledge.

Services will be provided in two phases, and will be based on availability of funding.

### **4.1 Services – Phase One**

Services that will be required from the contractor beginning immediately upon completion of the contract include but are not limited to, the following:

1. **Website Redesign and Development:** The contractor shall be responsible for the Colorado Historical Society website re-design and development, providing a hosted solution, user friendly design that enhances brand, built on a content management platform that will allow non-technical users the ability to manage and operate a dynamic website. Specifics for the content management system are attached, see Addendum A. The Colorado Historical Society is in the process of preparing its current website at [www.coloradohistory.org](http://www.coloradohistory.org) for redesign. The Colorado Historical Society is working with a website usability consultant to research and develop site architecture, cull content on current site, rewrite copy, and prepare the current site for migration onto a new site. The consultant will work closely with the contractor to ensure that all research is shared, and that the architecture structure and backend requirements for content management and database support are shared. The Contractor will be responsible for taking this process through to completion by locating a content management solution that meets the needs for the Colorado Historical Society from both a software and hardware perspective, and for designing a site around the new architectural structure that appropriately reflects the brand. The usability consultant will be responsible for migrating all content onto the new site.

### **4.2 Services – Phase Two**

Services that will be required from the contractor between January 2010 and the opening of the History Colorado Center in 2011 include but are not limited to, the following:

1. **Marketing Strategy:** The contractor shall participate in the development of a comprehensive marketing strategy and related budget, which includes recommended expenditures for media, production, marketing, and public relations.

2. **Public Relations Counsel:** The contractor shall provide public relations counsel and execution for local and national media.
3. **Advertising Strategy and Production:** The contractor shall develop a creative advertising campaign, including the design and production of advertising and collateral materials, and messaging for print, broadcast, on-line and other media.
4. **Media Planning:** The contractor shall develop a specific media plan that reaches identified target audiences and maximizes impact within the budget. This includes, but is not limited to, the following services:
  - a. Negotiation, purchase and instruction for placement of all time, space or other media.
  - b. Verification of publication according to the contracts and placement instructions.
  - c. Recommendation of budget savings where appropriate.
  - d. Distribution to media outlets of all materials necessary to fulfill media contracts/orders.
  - e. Evaluation of media schedule performance.
5. The contractor shall be responsible for copyrighting all History Colorado advertising material.
6. The contractor shall provide reports including, but not limited to, expenditure reports, project status, media usage, and media breakdowns by geographic area.

## **Section 5 – Response Format & Proposal Instructions**

### **5.1 Submission and General Instructions**

The process for selecting an advertising agency for the Colorado Historical Society shall be conducted by a panel of Colorado Historical Society staff and board members. The Request for Proposal (RFP) written response from interested agencies will be evaluated. The State may conduct discussions with Offerors in the competitive range for the purpose of promoting understanding of the State's requirements and the offeror's proposal, to clarify requirements, make adjustments in services to be performed, and in prices based upon an evaluation of the agency's written response to the RFP. The State may also include an agency site visitation at the discretion of the Colorado Historical Society.

A time schedule for the selection process is included. The Colorado Historical Society reserves the right to reject all proposals and not award a contract.

### **5.2 Request for Written Proposal**

Proposals must be received on or before the date and time indicated in the Schedule of Activities, or as modified on the BIDS system. It is the responsibility of the Offeror to ensure that the Colorado State Purchasing Office receives the proposal on or before the proposal opening date and time, regardless of the delivery method used. Late proposals will not be accepted. Vendors are cautioned that daily mail may not be received prior to 4:00 p.m.; therefore, if proposal is not hand delivered, Offeror should ensure proposal is received by mail or delivery service the prior day.

Submit one (1) original and four (4) copies of the proposal, as well as an electronic copy in Microsoft Word. The proposal package shall be delivered or sent by mail to:

State Purchasing Office  
633 17<sup>th</sup> Street, Suite 1520  
Denver, Colorado 80202  
Attention: Peter Van Ronk  
**[RFP-PVR-00001-10]**

The proposal must be signed in ink, preferable in blue ink, by an officer of the Offeror who is legally authorized to bind the Offeror to the proposal. Proposals that are determined to be at a variance with this requirement may not be accepted. A proposal signature page has been provided.

Proposals must be submitted and sealed in a package with an appropriate label affixed. The label must show the following information:

Offeror's Name  
RFP-No.  
Proposal Due Date and Time

Offerors must segregate the portion of the proposal responding to the pricing and funding proposal so the technical proposal can be evaluated without consideration of the price or funding model.

The State desires and encourages that proposals be submitted on recycled paper, printed on both sides. While the appearance of proposals and professional presentation is important, the use of non-recyclable or non-recycled glossy paper is discouraged.

Unnecessarily elaborate proposals are not desired. Font size for basic narrative descriptions must be no smaller than 12 characters per inch. Indexes, tables of contents, lists of figures/tables, and glossary of terms will not be counted toward the overall page count. Allowance will be made for tabular or graphical presentations and screen prints, whether incorporated in the text of the technical description or attached as separate exhibits. Textual explanations of screen prints or graphic materials, standard commercial brochures or descriptions, or other standard product documentation that are attached in appendices or exhibits will not be counted against page limitation. However, evaluators cannot be expected to comprehend all material in exhibits whose content and relevance to the proposal description are not clearly integrated into the technical discussion. Proposals shall include the following information and should not exceed [75] pages, excluding attachments and samples.

The objective of the selection process is to find an agency that has the capability to service the marketing, advertising and public relations needs of the Colorado Historical Society. In preparing for the RFP response, each agency should provide the following:

**1. Transmittal Letter**

The Transmittal Letter must be on official business letterhead of the agency proposing to become the contractor. The letter is to transmit the proposal and shall identify all material and enclosures being forwarded collectively as a response to the RFP. The Transmittal Letter must be signed by an individual authorized to commit the company to perform the work proposed.

**2. Company Information**

- a. Provide the agency's name, address, and internet URL, telephone and fax numbers. Include name, title, and E-mail address for the individual who will serve as the agency's primary contact.
- b. List top 10 clients.
- c. Describe your agency's capabilities in:
  1. Marketing & Advertising
  2. Website Development
  3. Public Relations
  4. Media Buying
  5. Promotions and Event Planning
- d. Identify/explain which services, if any would be sub-contracted outside the agency.
- e. Confirm the agency's ability to develop, produce and execute the website redesign and development portion of the plan within sixty days (60) days after execution of the contract.
- f. Describe the process and methods the agency employs to develop effective marketing and communications strategies.
- g. Provide background and experience of the individuals proposed for the account team.
- h. In no more than two pages, describe how the agency is ideally suited to address the challenges and opportunities of the Colorado Historical Society.

### **3. Case Histories**

- a. Provide two case histories for recent (within five years) advertising campaigns, including all aspects of the marketing plan, objectives, strategies, tactics, evaluation criteria, and results.
- b. Provide two case histories for recent (within five years) of websites that were developed for clients including information on the content management systems used in the production of the sites.

### **4. Plan Phase One - Website Redesign and Development**

Each agency shall present a plan for the redesign and development of the Colorado Historical Society website as outlined in section 4.2 and Exhibit A, assuming a \$50,000 total budget.

The plan shall include the following items:

- a. Objectives
- b. A projected timetable.

### **5. Phase Two - Marketing, Promotions and Public Relations**

Each agency shall present a plan to provide services as outlined in section 4.2, assuming a budget of \$300,000 from January 2010 through November 2012.

The plan shall include the following items:

- a. Objectives
- b. An itemized description of proposed services

### **5.3 Proposal Clarification Meetings**

The Colorado Historical Society reserves the right to hold proposal clarification meetings with those agencies in the competitive range. Agencies will be asked to explain and discuss the information provided in their responses to the RFP, and answer questions by the Colorado Historical Society Evaluation Committee. Only the agency's officers and account team personnel who will be directly responsible for and assigned to the Colorado Historical Society's account may participate in the proposal clarification meeting.

The Colorado Historical Society may elect to make agency site visitations to those in the competitive range. Agencies will be given a minimum of three (3) days notice prior to visitation.

## **Section 6 – Cost Component/Funding Model**

The \$50,000 budgeted for the redesign and development of the website is firm fixed funding and work on this deliverable is expected to begin immediately with the execution of the contract.

The remaining \$300,000 for marketing, promotions, and public relations services is being raised as part of a recently launched fundraising campaign. Work in these deliverables will be based on the availability of funds during the term of the contract. If no funds are raised, Phase Two will be cancelled.

Please complete Exhibit B the Cost Table and submit in a separate envelope from the main RFP response. If you find it necessary please provide a narrative explanation of your pricing with Exhibit B.

## **Section 7 – References**

Please provide a list of current accounts and at least three (3) and no more than five (5) references that support the Offeror's proposal. Provide the principle contact and telephone number, as well as a brief description of work performed for each. Include the timeframe for work performed. The State reserves the right to include the State of Colorado and other states as additional references. The State also reserves the right, at its discretion, to contact any organization or individual that may have knowledge of the Offeror for the purpose of verifying the information provided by the Offeror. The State will check references only on the apparently successful Offeror as a method of determining responsibility; references will not be scored.

## Reference Chart

| <u>Company Name</u> | <u>Contact</u> | <u>Telephone</u> | <u>Brief Description</u> |
|---------------------|----------------|------------------|--------------------------|
|                     |                |                  |                          |
|                     |                |                  |                          |
|                     |                |                  |                          |
|                     |                |                  |                          |
|                     |                |                  |                          |

## Section 8 – Evaluation and Award Selection Process

This section supplements paragraph 1.5, “Scope of RFP/Basis of Award” in the Colorado Solicitation Instructions/Terms and Conditions that are available through the link on the BIDS solicitation page.

### 8.1 Evaluation Criteria For Written Proposals

The following factors in decreasing order of importance will form the basis for evaluating written proposals:

- ✧ Plan for Marketing, Promotions and Public Relations
- ✧ Plan for Website Redesign and Development
- ✧ Case Histories
- ✧ Agency Organization and Experience
- ✧ Cost

### 8.2 Award Methodology

An Evaluation Committee will evaluate the merits of proposals received in accordance with the evaluation factors stated in this RFP and identify the proposal that is most advantageous to the state. While numeric evaluations may be used in some aspects of the process to identify strengths and weaknesses of proposals, the final decision will be a business decision and will not be based on a numerical score. A Decision Memorandum will document the basis for the award decision.

Failure of the Offeror to provide any information requested in this RFP may result in disqualification of the proposal. This responsibility belongs to the Offeror.

Offerors should not assume that they will have an opportunity for oral presentations or revisions of proposals, so they should submit their most favorable proposals as their initial proposal. If award is not made on receipt of initial proposals, Offerors in the competitive range (those most responsive to the requirements and reasonably susceptible of being selected for award) may be provided an opportunity to make an oral presentation. The oral presentation will include a discussion for the purpose of clarification and to ensure full understanding of and responsiveness to solicitation requirements.

If proposal revisions are permitted after oral presentations and discussions, a date will be established in writing by the State for submission of best and final offers. Offerors will not be provided an opportunity for comprehensive proposal revisions.

The apparently successful Offeror may be required to submit for the most current reported period and a reasonable number of previous years (in order of preference) an audited financial statement, a financial statement reviewed by a certified public accountant, a third-party prepared financial statement if an audited or reviewed statement is not available, or another financial statement prepared in the routine course of the Offeror's business, in order to assist the State in making its determination of Offeror responsibility in accordance with CRS 24-103-401.

## **Exhibit A**

Specifics for the design, development, and hosting of the website are as follows:

1. Web-based content management system features:
  - a. Effective framework in which to manage website
    - i. The content management solution should include:
    - ii. Browser based solution with support for IE 6 or newer. Firefox and Safari support is desired but optional.
    - iii. Microsoft Word-like content editing
    - iv. Clearly delineated boundaries for inclusion of text, images, video, and other content as it evolves
    - v. A simple browser based process to include or upload content
    - vi. Easy to use components or widgets that include (this is not an exhaustive list) such functions as:
      1. Knowledge Base
      2. Shopping Cart (at least CPI level 2 compliant)
      3. Calendars
      4. Registrations
      5. RSVP
      6. Multi-media widgets for easy inclusion of content
      7. Dynamic content for Profiles, Events, News, seminars
      8. Automatic e-mail acknowledgement
      9. E-mail broadcast (list-serve)
      10. Search aids such as search site and internet as well as site map
      11. Ability to re-use content (library) from each of the above areas
      12. Categorized content (link to similar internal and external pages)
  - b. Cascading style sheet like usage of common content and formats
  - c. Common text editing format similar to Microsoft Word look and feel
  - d. Support of ASP, Microsoft SQL server, and Microsoft .Net
  - e. Allows client access to HTML source code
  - f. Toggle view of source code and design views like Dreamweaver
  - g. Automatic notification of page aging and review
  - h. Flexible enough to allow the passage of information to databases which may be hosted on other web sites and servers.
  - i. Dynamic page creation (includes the ability to locate the page within the site)
  - j. Browser based solution for easy navigation of pages within site hierarchy
  - k. Easy, browser based manipulation of site hierarchy/layout (movement of pages and content within the site) that automatically updates site navigation (user perspective)
  - l. Multiple security level access for particular content
  - m. On-line browser based help for usage of the content solution
  - n. Easy to manage Meta Tags – browser based interface to select and add content to tags.
2. Applications, provided and updated at no additional cost:
  - a. Ecommerce shopping cart, minimum level 2 PCI compliance
  - b. Site mapping
  - c. Search capabilities
  - d. Site metrics and analytics
  - e. Photo gallery

- f. Knowledge base
  - g. Calendaring
  - h. Survey form generator
  - i. Role based security to the page level.
- 3. Site Design:
  - a. Custom design to ensure consistent communication of our brand.
  - b. Built on architecture provided by Colorado Historical Society
- 4. Hosting, for a monthly fee:
  - a. Host site on secure servers including intrusion detection and protection
  - b. Demonstrable system up-time including application (content management and website hosting) of 99.95%
  - c. Provide ongoing maintenance and upgrades to hardware and software
  - d. Provide ongoing maintenance to content management system
  - e. Periodic backups to include:
    - i. daily backups
    - ii. retention of at least three months.
    - iii. quarterly test of data restoration and methodology
  - f. Load balancing between servers to allow headroom for blockbuster events, and/or high media content on-line exhibitions.