

REQUEST FOR PROPOSALS PROMOTIONAL SERVICES

for the

BOARD OF REGENTS, STATE OF IOWA

SECTION A. - PURPOSE AND INTENT

The Office of the Board of Regents, State of Iowa, (Board Office) is soliciting proposals from qualified and experienced entities for the planning and execution of a campaign to help build public awareness and sustainable support within Iowa for the vital contributions of Iowa's public universities. The terms of the contract will be from February 6, 2012 through February 5, 2013, with options to renew for one year on February 6, 2013.

The Board, an agency of the State of Iowa, is the governing body of the State University of Iowa at Iowa City, Iowa State University of Science and Technology at Ames, and the University of Northern Iowa at Cedar Falls. Fall 2011 headcount enrollment at the three universities was 73,948. The Board also governs the Iowa Braille and Sight Saving School in Vinton and the Iowa School for the Deaf in Council Bluffs.

The Governor appoints members to the Board every two years subject to approval by two-thirds of the Senate of the General Assembly of the State of Iowa. The nine Board members serve for six-year over-lapping terms. Eight of the members are selected from the state at large and the ninth member is a student at the time of appointment. Members can be reappointed and are selected on the basis of their qualifications to perform the duties required by the Board. Not more than five of the nine members may be of the same political party at any one time.

By statute, the Board of Regents exercises broad policymaking, coordination, and oversight responsibilities. The Board maintains a staff, under the direction of its Executive Director, to provide administrative and professional support and to work closely with institutional officials, who are delegated significant authority for daily operations. Under Iowa Code Chapter 262, the Board is responsible to "have and exercise all the powers necessary and convenient for the effective administration of its office and of the institutions under its control..."

The Board has in place governance processes designed to allow it to make major policy decisions and to monitor the institutions' programs. Regular meetings include agenda items such as: annual governance reports; financial management and business operations; academic programs; strategic planning, institutional systems policies and oversight; appointment of institutional presidents and superintendents, advocacy of institutional interests and needs; and adjudication of disputes.

Serving the people of Iowa, the Board of Regents:

- Governs and coordinates the activities of Iowa's three public universities and two special schools;
- Advocates for and exercises responsible stewardship of resources;
- Engages capable presidents and superintendents to ensure that the institutions apply knowledge to benefit Iowans;
- Communicates the positive impact and value of the Regent institutions to the state, its citizens and society.

The Board of Regents, working through Iowa's public universities and special schools:

- Provides high-quality, accessible education to students
- Engages in high-quality research, scholarship, and creative activities to enhance the quality of life for Iowans and society in general;
- Provides needed public services;
- Creates and supports economic development in partnership with public and private sectors.

University of Iowa

The State University of Iowa, in Iowa City, Iowa, was established in 1847 as the State's first public institution of higher education. The University was the first public university in the nation to admit men and women on an equal basis and the first to accept creative work in theater, writing, music and art as theses for advanced degrees. The University is internationally known, among other things, for its Writers' Workshop, and its pioneering outer space research, with University-designed research instruments used in major missions since the 1950's. The University operates one of the nation's largest university-owned teaching hospitals. Approximately half a million visits are made to the State University of Iowa Hospitals and Clinics every year.

Fall 2011 headcount enrollment at the University was 30,893 students.

The University has been accredited by the North Central Association of Colleges and Secondary Schools since the association's organization in 1913. The University is a member of the Association of American Universities. Various colleges and schools of the University are members of accrediting associations in their respective fields.

The University is organized into the following colleges: the College of Liberal Arts and Sciences, the Tippie College of Business, the College of Education, the College of Engineering, the College of Public Health, the Carver College of Medicine, the College of Nursing, the College of Dentistry, the College of Law, and the College of Pharmacy. The Graduate College supervises graduate study offered by the University's various departments, schools and colleges, and confers master's degrees and doctorates.

Iowa State University

Iowa State University of Science and Technology, Ames, Iowa, was chartered by the State General Assembly in 1858. Iowa was the first state to accept the terms of the Morrill Land Grant Act of 1862, and in March, 1864, the General Assembly awarded Iowa's grant to the University, known then as the Iowa Agricultural College. The first class of 26 graduated in 1872. Since 1959, the University has been known as Iowa State University of Science and Technology.

The University pioneered in the establishment of agricultural curricula and was the first state institution to found a veterinary school. Experimentation and research have been integral parts of the University from its beginning, first in agriculture, and later in home economics, engineering, veterinary medicine and the physical and social sciences.

Fall 2011 headcount enrollment at the University was 29,887 students.

The University is accredited by the North Central Association of Colleges and Secondary Schools as well as by appropriate professional organizations. It is also a member of the Association of American Universities.

The University is organized into the following undergraduate colleges: the College of Agriculture, the College of Business, the College of Design, the College of Engineering, the College of Human Sciences, and the College of Liberal Arts and Sciences. These colleges each grant bachelor's degrees. The Graduate College administers the graduate programs of the colleges and confers the master's degree and doctor of philosophy. The College of Veterinary Medicine awards the doctor of veterinary medicine degree.

University of Northern Iowa

The University was established in 1876 and opened on September 5, 1876, as the Iowa State Normal School. In 1909, it was renamed the Iowa State Teachers College and attained a national reputation as a leading institution in the field of teacher education. In 1961, the institution’s name was changed to the State College of Iowa and degree programs were added for those not planning to teach. The change to the University of Northern Iowa was effected in 1967. The University now offers courses covering a broad spectrum of curriculum on both the undergraduate and graduate level.

Fall 2011 headcount enrollment at the University was 13,168 students.

The University of Northern Iowa is a member of the American Association of State Colleges and Universities (AASCU), the American Association of Colleges for Teacher Education (AACTE), and the Council of Graduate Schools in the United States. The University is accredited through the master’s degrees, the specialist’s degrees and the doctorate (Doctor of Education and Doctor of Industrial Technology) by the North Central Association of Colleges and Secondary Schools (NCA). Individual programs are accredited by several national accrediting agencies.

Iowa School for the Deaf

The Iowa School for the Deaf (ISD) was established in 1855, near Iowa City, and in 1870, was *relocated to Council Bluffs. The School came under governance of the Board of Regents in 1917.* The School enables deaf and hard of hearing children to attain personal excellence by providing them with comprehensive and appropriate educational programs and services.

Iowa Braille and Sight Saving School

The Iowa Braille and Sight Saving School (IBSSS) was founded in 1852 as a private school in Keokuk. Within a year, it was established by the General Assembly as a public school and relocated to Iowa City. In 1862, with community as well as private contributions, the General Assembly moved the school to Vinton. In 1911, the School was placed under the governance of the Board of Regents. The School enables Iowa students who are blind or visually impaired to function as independently as possible in all aspects of life by providing appropriate educational opportunities, resources, and support services.

SECTION B. - DEFINITIONS

Bidder	A qualified entity experienced in providing integrated promotional services.
Contract:	The RFP, any addenda thereto, the bidders proposal, and the contractual agreement entered into between the Board Office and the successful Bidder. The contract constitutes the entire agreement between the Board Office and the Contractor in connection with this RFP.
Evaluation Committee:	Board Office representatives
Anticipated Award Date:	February 1, 2012
Entity:	Office of Board of Regents, State of Iowa
Invoice:	Billing by Contractor for services rendered

SECTION C. INFORMATION TO BIDDERS

Closing Date:	Friday, January 13, 2012 at 4:30 p.m. (Central Standard Time)
Finalists Notified:	Wednesday, January 18, 2012
Final Presentations:	January 26-30, 2012 (one day will be selected)
Starting Date of Contract	February 6, 2012
Completion Date:	February 5, 2013, with options to renew for one year on February 6, 2013.
Contract Amount:	The total amount of the contract resulting from this RFP is not yet known. Anticipate an average time commitment between 10 and 20 hours per week

SECTION D. - PROPOSAL PROCESS

- CLOSING DATE.** The closing date for receipt of responses to this Request For Proposal (RFP) is January 13, 2012 at 4:30 p.m. (Central Standard Time) at the address below. It is anticipated that a final decision on the selection of a contractor will be made by February 1, 2012.

Board of Regents, State of Iowa
11260 Aurora Avenue
Attn: Patrice Sayre, Chief Business Officer
Urbandale, Iowa 50322
(515)-281-3934; psayre@iastate.edu
- ELIGIBLE BIDDERS.** All eligible bidders must meet the following minimum eligibility requirements:

 - Demonstrate a familiarity with the Board of Regents and its initiatives.
 - Have a successful track record of providing integrated marketing services.
 - Demonstrate an ability to service the contract on a daily basis if contractor's place of business is in a location different from the Board Office.
- SUBMISSION OF PROPOSAL.** Five paper copies and an electronic version of each proposal should be submitted. All proposals will be considered sealed and not opened until after the closing date. The proposal shall consist of the following parts as outlined in this RFP:

 - Basic Data on Bidder - Qualifications and Experience
 - Proposal to Implement the Statement of Work
 - Budget - Cost of Services
 - To be considered complete, a signed Assurances, Representations, and Authorization to Release Information form must accompany the response to this RFP
- REJECTION OF PROPOSALS.** Proposals shall be rejected and not reviewed by the Board Office for any of the following reasons:

 - The proposal is not received at the Board Office on or before 4:30 p.m. (Central Standard Time) on January 13, 2012 at its offices at 11260 Aurora Avenue, Urbandale, Iowa, 50322.
 - The Bidder fails to respond to any part of this RFP or does not provide information in the format required.

- c. The proposal is not signed by an authorized representative of the Bidder.
 - d. There is evidence that the Bidder engaged in unfair bidding procedures.
 - e. Financial insolvency of the Bidder.
 - f. The Bidder fails to comply with the minimum eligibility requirements of Section D(2) above and is determined to be ineligible.
5. LIMITATION. This RFP does not commit the Board Office to award a contract or to pay costs incurred by bidder in the preparation of a proposal to this RFP. The Board Office may accept other than the lowest bid, waive minor informalities, and award a contract based only on the written proposal without any discussions with Bidder.
6. REQUESTS FOR CLARIFICATION. All questions concerning this Request for Proposals are to be directed to Patrice Sayre in writing to psayre@iastate.edu by noon (CST) January 9, 2012. Responses to all questions received will be posted on the Board of Regents web site at <http://www.regents.iowa.gov/rfp/rfpcover.html> no later than January 11, 2012.
7. AMENDMENTS TO RFP; POSTING TO INTERNET
- a. The Board Office reserves the right to amend the RFP at any time. The Bidder shall acknowledge receipt of an amendment in its proposal. If the amendment occurs after the closing date for receipt of bid proposals, the Board Office may, in its sole discretion, allow Bidders to amend their bid proposals in response to the Board Office's amendment if necessary. The Bidder may amend its bid proposal. The amendment must be in writing, signed by the Bidder and received by time set for the receipt of proposals. Vendors who submit proposals in advance of the deadline may withdraw, modify, and resubmit proposals at any time prior to the deadline for submitting proposals. Vendors must notify the Board Office contact person in writing if they wish to withdraw their proposals.
 - b. All amendments will be posted on the Board Office's web page at : <http://www.regents.iowa.gov/rfp/rfpcover.html>. Each Bidder is advised to check this home page periodically for amendments to this RFP.
8. COPYRIGHTS. By submitting a bid proposal, the Bidder agrees that the Board Office may copy the bid proposal for purposes of facilitating the evaluation of the bid proposal or to respond to requests for public records. The Bidder consents to such copying by submitting a bid proposal and warrants that such copying will not violate the rights of any third party. The Board Office shall have the right to use ideas or adaptations of ideas that are presented in the bid proposals.
9. CONTRACT.
- a. The Board Office reserves the right to either award a contract without further negotiation or to negotiate contract terms with the selected Contractor if the best interests of the State would be served.
- The successful Bidder must, in a timely manner, enter into a contract with the Board Office to implement the services contemplated by this RFP. This contract will include, but not be limited to, terms and conditions that clarify the respective roles and responsibilities of the Bidder and Board Office. Representative subjects that will be included in a final contract include, but are not limited to, the following provisions: payment limitations; work authorization procedures; default and termination terms; indemnification requirements; identification of key personnel; intellectual property rights; non-appropriation or reduction in funding; clarification that Iowa law will govern this contract.

b. It is expected that a contract between the Bidder and Board Office will be executed within approximately 30 days after the date of the notification of the award. Failure of the successful Bidder to agree to the terms of a contract within this time period may be grounds for the Board Office to award the contract to another Bidder.

10. RESTRICTIONS ON GIFTS AND ACTIVITIES. Iowa Code Chapter 68B restricts gifts which may be given or received by state employees and requires certain individuals to disclose information concerning their activities with state government. Bidders are responsible for determining the applicability of this Chapter to their activities and complying with the requirements. In addition, pursuant to Iowa Code section 722.1, it is a felony offense to bribe or attempt to bribe a public official.

11. PROPOSAL REVIEW. The Board Office will initially review all proposals received for completeness. Completed proposals will be evaluated and rated by January 18, 2012. The following criteria, not necessarily listed in order of importance, will be used to evaluate proposals:

- Proposer's project approach and methodology;
- Familiarity with the State of Iowa, the Board of Regents, and the Regent institutions;
- Quality of project work plan;
- Description of the proposed deliverables;
- Project management and internal controls;
- Firm's and staff qualifications and experience;
- Firm's professional reputation for integrity and compliance with state and federal laws;
- Commitment to fair and equitable employment practices;
- Business references;
- Administrative capacity to provide the services;
- Financial capability; and
- Project costs.

These criteria are general in nature and may be used to develop a more detailed evaluation work sheet. The Board Office reserves the right to evaluate financial capability of any or all Bidders to satisfactorily complete the requirements of this RFP. Finalists will be chosen to make no more than 60-minute presentations to the Evaluation Committee (refer to Section B for composition of Committee) during the period January 26-30, 2012.

12. PERIOD OF PERFORMANCE. The period of performance will be from February 6, 2012 to February 5, 2013. In the event that the contractor selected through this RFP does not complete the contract, due to termination or any other reason, the Board Office reserves the right to negotiate with the next highest-ranking Bidder(s) to complete the contract period without releasing an additional RFP.

13. OPTION TO EXTEND. Based on the availability of funds, effective contract performance and the needs of the Board Office, the contract may be extended for an additional year.

14. PUBLIC RECORDS AND REQUESTS FOR CONFIDENTIAL TREATMENT.

- a. The Board Office may treat all information submitted by a Bidder as public information following the conclusion of the selection process unless the Bidder properly requests that information be treated as confidential at the time of submitting the bid proposal.
- b. The Board Office's release of information is governed by Iowa Code Chapter 22. Bidders are encouraged to familiarize themselves with Chapter 22 before submitting a proposal. The Board Office will copy public records as required to comply with the public records laws.

- c. Any request for confidential treatment of information must be included in the transmittal letter with the Bidder's bid proposal. In addition, the Bidder must enumerate the specific grounds in Iowa Code Chapter 22 or other applicable law which support treatment of the material as confidential and explain why disclosure is not in the best interest of the public. The request for confidential treatment of information must also include the name, address, and telephone number of the person authorized by the Bidder to respond to any inquiries by the Board Office concerning the confidential status of the materials. Any bid proposal submitted which contains confidential information must be conspicuously marked on the outside as containing confidential information, and each page upon which confidential information appears must be conspicuously marked as containing confidential information. Identification of the entire bid proposal as confidential may be deemed non-responsive and disqualify the Bidder.
 - d. If the Bidder designates any portion of the RFP as confidential, the Bidder must submit one copy of the bid proposal from which the confidential information has been excised. This excised copy is in addition to the number of copies requested in section 3 of this RFP. The confidential material must be excised in such a way as to allow the public to determine the general nature of the material removed and to retain as much of the bid proposal as possible. The Board Office will treat the information marked confidential as confidential information to the extent such information is determined confidential under Iowa Code Chapter 22 or other applicable law by a court of competent jurisdiction. In the event the Board Office receives a request for information marked confidential, written notice shall be given to the Bidder seven calendar days prior to the release of the information to allow the Bidder to seek injunctive relief pursuant to Section 22.8 of the Iowa Code.
 - e. The Bidder's failure to request confidential treatment of material will be deemed by the Board Office as a waiver of any right to confidentiality, which the Bidder may have had.
15. DISPOSITION OF BID PROPOSALS. All proposals become the property of the Board Office and shall not be returned to the Bidder unless all bid proposals are rejected or the RFP is cancelled. In either event, Bidders will be asked to send prepaid shipping instruments to the Board Office for return of the bid proposals submitted. In the event the Board Office does not receive shipping instruments, the Board Office will destroy the bid proposals. Otherwise, at the conclusion of the selection process, the contents of all bid proposals will be in the public domain and be open to inspection by interested parties subject to exceptions provided in Iowa Code Chapter 22 or other applicable law.
16. NONDISCRIMINATION. The Board Office does not discriminate in the contract award process on the basis of sex, age, race, religion, color, national origin, or disability.
17. SMALL BUSINESSES AND TARGETED SMALL BUSINESSES. Under Iowa's targeted small business procurement program, State entities have established procurement goals for the purchase of goods and services supplied by small businesses and targeted small businesses. Certified targeted small businesses and small businesses are encouraged to respond to this RFP. The terms "small business" and "targeted small business" are as defined in Iowa Code (2011) section 15.102.

SECTION E. - BASIC DATA ON BIDDER - Qualifications and Experience

All proposals must include the following basic data about the Bidder:

- 1. Name, telephone number and address, including e-mail address, of Bidder.
- 2. Name and title of individual authorized to bind the Bidder and submit the proposal.
- 3. Name, e-mail address and telephone number of person the Board Office may contact during the proposal evaluation process.
- 4. Form of business - e.g. sole proprietorship, partnership, corporation, Not-for Profit

organization. If a non-Iowa corporation, indicate state of incorporation.

5. Whether the business is owned or controlled by a parent corporation. If yes, provide the name and address of the parent corporation, nearest offices and managing office where the project staff assigned to this project will be located.
6. A chart of the Bidder's organization showing the level of organizational responsibility of key project staff member. Also chart how projects flow through the agency, using an example.
7. A list of personnel to be assigned to this RFP, their functions in the project, length of tenure, and a detailed resume of each.
8. Documented experience in performing similar projects by providing the Board Office a list of clients for whom the representative has provided similar services during the past three years. These clients may be contacted as references.
9. List other state communications or public relations contracts handled by your agency. Also describe experiences with state work authorizations and billing procedures.
10. Recent annual financial report or bank references for evaluation of financial capability to satisfactorily complete the requirements of this RFP.
11. Whether the Bidder is a small business or certified targeted small business as defined in Iowa Code (2011) section 15.102.
12. Information concerning terminations, litigation and debarment. Bidder shall provide answers to the following questions:
 - a. During the last five (5) years, has the Bidder had a contract for services terminated for any reason? If so, provide full details related to the termination.
 - b. During the last five (5) years, describe any order, judgment or decree of any Federal or State authority barring, suspending, or otherwise limiting the right of the Bidder to engage in any business, practice, or activity.
 - c. During the last five (5) years, list and summarize pending or threatened litigation, administrative or regulatory proceedings, or similar matters that could affect the ability of the Bidder to perform the required services. The Bidder must also state whether it or any owners, officers, or primary partners have ever been convicted of a felony. Failure to disclose these matters may result in rejection of the bid proposal or in termination of any subsequent contract. This is a continuing disclosure requirement. Any such matter commencing after submission of a bid proposal, and with respect to the successful Bidder after the execution of a contract, must be disclosed in a timely manner in a written statement to the Board Office.
 - d. During the last five (5) years, have any irregularities been discovered in any of the accounts maintained by the Bidder on behalf of others? If so, describe the circumstances of irregularities.

SECTION F. - PROPOSAL TO IMPLEMENT THE STATEMENT OF WORK

Background: The Board of Regents, State of Iowa, strives to enhance the quality of life for Iowans statewide by ensuring high-quality educational opportunities for students, discovering new knowledge through research, scholarship, and creative activities; providing needed public services and promoting economic growth; and demonstrating public accountability and effective stewardship of resources.

The Board Office is seeking a provider to develop a strategic outreach and engagement plan that is student-led and Regents-supported; the engagement of students is central to the plan.

The communications objectives and target audiences are as follows:

Communication Objectives:

1. Define and refine a Regent unified message.
2. Demonstrate to Iowans the quality, impact, and opportunities of the Regent institutions and the importance of public investment in Regent operations.
3. Educate the target audiences about the benefits of the Regent and institutional efforts for the state as well as local communities throughout the state.
4. Support and build upon institutional efforts to showcase the “best” in each institution.
5. Demonstrate how Iowa’s public universities promote the State’s economic efforts in innovation and job creation.
6. Create a communication strategy that will be driven by the students with institutional support.

Target Audiences:

Students and families	Regent institution alumni
Iowa taxpayers	State elected officials
Business/community leaders	Media

Results include:

- A plan, with a unified Regent message, to accomplish the Regent communication objectives.
- Working with students, alumni and other stakeholders, implementation of a statewide campaign to increase awareness of Regent impact to target audiences.
- Identification of delivery media and materials to be created and distributed to accomplish the communication objectives.
- Development of a media presentation that can be distributed digitally or presented in a “road show”.
- Development of an on-going communications tool on Regent impact and opportunities.
- Method of measuring impact of communication plan.

Assignment:

Respondents should demonstrate their group's capabilities and thought processes and suggest communications strategies to continue implementing the student-led, Regents-supported campaign.

SECTION G. - COST OF SERVICES - BUDGET

The Bidder must provide a detailed breakdown of the expected costs for services including hourly rates for services and rates for on-site services and travel time. Anticipate an average time commitment between 10 and 20 hours per week.

SECTION H. – ADDITIONAL CONDITIONS

The successful Bidder shall provide the Board Office with monthly activity reports relevant to the agreed upon scope of work. These reports shall be due by the 10th of the month. Said report to be attached to detailed monthly request for payment for services rendered.

Please sign and date the next page prior to submitting bid proposal.

ASSURANCES, REPRESENTATIONS AND AUTHORIZATION TO RELEASE INFORMATION

The Bidder hereby assures and represents with respect to this proposal that:

1. It possesses legal authority to submit this proposal; that a resolution, motion or similar action has been duly adopted or passed as an official act of the Bidder's governing entity authorizing the submittal of this proposal, including all assurances, representations contained herein, and directing and authorizing the person signing below to act in connection with the application and to provide additional information as may be required.
2. It will comply with all applicable federal and state equal opportunity and affirmative action requirements.
3. All statements and information made or furnished to the Board Office are true and correct in all material respects. Bidder has not knowingly made any false statements in its proposal. Bidder acknowledges that supplying any information determined to be false, misleading or deceptive will be grounds for disqualification from consideration.
4. Bidder hereby authorizes the Board Office to obtain information regarding its performance on other contracts, agreements or other business arrangements, its business reputation, and any other matter pertinent to evaluation and the selection of a successful Bidder in response to this Request for Proposal. It authorizes the Board Office to research the company's history, make credit checks, contact the company's financial institution, contact former and current clients of the company, and perform other related activities necessary for reasonable evaluation of this proposal.
 - The Bidder acknowledges that it may not agree with the information and opinions given by such person or entity in response to a reference request. The Bidder acknowledges that the information and opinions given by such person or entity may hurt its chances to receive contract awards from the Board Office or may otherwise hurt its reputation or operations. The Bidder is willing to take that risk.
 - The Bidder hereby releases, acquits, and forever discharges the State of Iowa, Board of Regents, their officers, directors, employees and agents from any and all liability whatsoever, including all claims, demands and causes of action of every nature and kind affecting the undersigned that it may have or ever claim to have relating to information, data, opinions, and references obtained by the Board Office in the evaluation and selection of a successful Bidder in response to this Request for Proposal.
 - The Bidder authorizes representatives of the Board Office to contact any and all of the persons, entities, and references which are, directly or indirectly, listed, submitted, or referenced in the undersigned's proposal submitted in response to this Request for Proposal.
 - The Bidder further authorizes any and all persons or entities to provide information, data, and opinions with regard to the undersigned's performance under any contract, agreement, or other business arrangement, the undersigned's ability to perform, the

undersigned's business reputation, and any other matter pertinent to the evaluation of the undersigned. The undersigned hereby releases, acquits and forever discharges any such person or entity and their officers, directors, employees and agents from any and all liability whatsoever, including all claims, demands and causes of action of every nature and kind affecting the undersigned that it may have or ever claim to have relating to information, data, opinions, and references supplied to Board Office in the evaluation and selection of a successful Bidder in response to this Request for Proposal.

- A photocopy or facsimile of this signed Authorization is as valid as an original.

Signature

Date

Type or Print Name, Title

This form must be signed by an authorized representative of the Bidder and submitted to the Board Office along with Bidder's proposal.

RFP: Promotional Services for the Board of Regents

ENTITY: Board of Regents, State of Iowa

RFP RELEASE DATE: December 23, 2011