

REQUEST FOR PROPOSALS

BRANDING CONSULTANT

Commuter ridematching services in Ohio are currently split between two separate websites and brands: OhioRideshare and RideshareOhio. The primary focus of the websites are to help reduce single occupant vehicle (SOV) travel via free ridematching services to the public while simultaneously promoting ridesharing and other Transportation Demand Management strategies. The systems also provide information to travelers who might be interested in walking, biking, or taking transit.

Each website is operated by two distinct partnerships of Metropolitan Planning Organizations (MPO). The following seven MPOs operate the two websites separately:

OhioRideshare

Akron Metropolitan Area Transportation Study (AMATS)
Eastgate Regional Council of Governments [Youngstown]
Northeast Ohio Areawide Coordinating Agency (NOACA) [Cleveland]

RideshareOhio

Miami Valley Regional Planning Commission (MVRPC) [Dayton]
Mid-Ohio Regional Planning Commission (MORPC) [Columbus]
Ohio-Kentucky-Indiana Regional Council of Governments (OKI) [Cincinnati]
Toledo Metropolitan Area Council of Governments (TMACOG)

The abovementioned MPOs are members of the Ohio Association of Regional Councils (OARC), which is sponsoring this RFP. OARC has recently selected a new web-based Transportation Demand Management (TDM) platform that will consolidate and upgrade the abovementioned websites. As part of the consolidation and upgrade, OARC intends the new platform to be a distinct shift toward a more comprehensive suite of TDM strategies (beyond ridesharing) that ultimately help users make informed decision about transportation choice.

As part of the consolidation and system upgrade, OARC partners view this as an opportune time to explore new branding opportunities for our program.

As the sponsor of this RFP, OARC is seeking to hire a Professional firm who can develop and design a uniform brand for OARC TDM/ridematching services administered by the abovementioned MPOs. The ideal firm will work with representatives of the agencies identified above to understand the goals and market of the program. After gaining an adequate understanding of the program, the firm shall develop three (3) concept brands for the group to discuss. Each brand should consist of various logos/icons and slogans/taglines. The elements should combine to make a brand that's intriguing and easily recognizable across multiple Ohio regions.

With guidance from the firm, the participating representatives from each MPO will discuss and analyze the brand concepts, and ultimately select one brand to adopt for OARC. After a brand is selected, the firm shall provide a style guide to help maintain consistent use across regional boundaries

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Firms interested in being considered must submit **TWO (2) printed copies and one (1) in the form of a compact disc or jump drive in a PDF format.** Proposals will be received by OARC until **12:00PM (ET), MONDAY, JANUARY 9, 2017.**

Submit proposals to:
Mid-Ohio Regional Planning Commission
Attn: SHARI SAUNDERS
111 Liberty Street, Suite 100
Columbus, OH 43215
ssaunders@morpc.org

Proposals must arrive in the MORPC offices prior to the proposal due date and time. Firms making proposals should take this into account when choosing a mail carrier. Facsimile submissions will not be accepted.

All questions must be submitted in writing and should be submitted via mail or email to DAN SHEEHAN at dsheehan@morpc.org. No answers will be given over the phone. Written answers, including any amendments to the RFP if necessary will be posted on MORPC's website. Responses to questions will be posted at <http://www.morpc.org/about-morpc/overview/rfps-rfqs/index>.

The Ohio Association of Regional Councils, in accordance with Title VI of the Civil Rights Act of 1964, 78 Stat. 252, 42 U.S.C. 2000d to 2000d-4 and Title 49, Code of Federal Regulations, Department of Transportation, Subtitle A, Office of the Secretary, Part 21, Nondiscrimination in Federally-Assisted Programs of the Department of Transportation issued pursuant to such Act, hereby notifies all bidders that it will affirmatively insure that in any contract entered into pursuant to this advertisement, minority business enterprise will be afforded full opportunity to submit bids in response to this invitation and will not be discriminated against on the grounds of race, color, creed, religion, ancestry, national origin, sex or gender, sexual orientation, disability or other handicap, age, marital/familial status, income, or status with regard to public assistance in consideration for an award.

Neither OARC nor any member agency of the Committee shall be liable for any costs incurred by the firm in response to this RFP, or any costs incurred in connection with any discussions, correspondence or attendance at interviews or negotiation sessions.

All materials submitted in response to this RFP shall become the property of OARC and may be returned only at OARC's option.

All materials received shall be considered public information and shall be open to public inspection. Please include a confidentiality statement if you wish to be notified of public requests to view your proposal.

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I. OVERVIEW/PROJECT BACKGROUND

OARC seeks a qualified professional firm who can develop and design three (3) brand concepts for OARC TDM/ridematching services administered by the abovementioned MPOs. As part of the brand concepts, the firm shall develop logos/icons and slogans/taglines for each concept. The ideal firm will work with the collective group to discuss goals and concepts for the brand concepts. The brand concepts should intrigue potential users and be easily recognizable across multiple Ohio regions.

After designing the concepts, the ideal vendor will help the MPO discuss and analyze the brand concepts, and ultimately select one brand to adopt for OARC. After a brand is selected, the firm shall provide a style guide to help maintain consistent use across regional boundaries.

II. SCOPE OF SERVICES

The firm shall perform the following activities:

1. **Gain Market Understanding.** The firm must gain an understanding of the markets and program goals for the separate MPOs. Upon contract execution, MPOs will provide the firm with a brief summary of existing conditions, along with current marketing strategies and branding material. After gaining a general understanding of the group's situation, the firm shall group conference call(s) to further discern program expectations and brand desires.
2. **Develop a Uniform Brand(s).** After a general understanding of the market and MPO program goals is established, the firm shall develop at least three (3) distinct brand concepts (including logos/icons, slogans/taglines, etc.) for OARC agencies to evaluate. Proposed brands will need to include the following:
 - a. Name
 - b. Logo
 - c. Recommended color schemes with RGB & CMYK codes
 - d. Tagline(s)
 - e. Hashtag recommendations
 - f. Web address

After the brand and tagline choices are developed, firm is expected to test brands on focus groups to help determine public interpretation and perception of the products. A summary report of findings should be supplied to OARC members. If a firm feels their ability to conduct focus group review is not possible or severely limited within the allotted timeframe and budget, please indicate such concerns in your response.

3. **Facilitate Discussion Process.** The firm should present the brand concepts to OARC and include rationale for their decision making. The firm should then be available for any group discussions thereafter to provide assistance in selecting the ideal brand for the group.
4. **Closeout Report & Style Guide.** Upon project conclusion, the firm shall provide a closeout report that details the collaborative process taken to develop and select the uniform brand. The report shall include information that addresses the following points:
 - a. An outline of the steps taken to complete this process
 - b. A summary of key findings regarding OARC input and market research

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- c. The importance of having a uniform brand across the multiple regions participating in this project
 - i. An estimated return on investment if a uniform brand were to be selected
- d. A final recommendation to move forward with the project
- e. Style Guide
 - i. A brief document outlining recommended methods of using the logo
 - ii. Includes a variety of logo sizes and file types that can be used in a wide array of mediums, such as .jpg, .png, .ai, .psd, .eps, etc.

III. PROPOSAL FORMAT

The proposal must address the following items in the following order. Failure of the proposal to respond to a specific requirement may be a basis for elimination from consideration during the comparative evaluation. OARC reserves the right to accept or reject any or all proposals.

Each firm shall submit a formal proposal not to exceed TEN (10) 8.5" x 11" pages (excluding tabs, dividers, etc.) and shall contain the following sections:

- A) Cover Letter
- B) Organization, Personnel, Experience & Project Management
 - a. Firm's Personnel Profile and Qualifications
 - b. Project Team Availability and Capacity
 - c. Prior work experience, including samples of brands (i.e. logos and taglines) developed
- C) Work Plan
 - a. List and Description of Deliverables
 - b. Project Schedule
- D) Budget or Cost Proposal
- E) Disadvantaged Business Enterprise (DBE) Goal Compliance/Subcontracting

A.) COVER LETTER

The **cover letter** shall be signed by a representative authorized to legally bind the firm, and include:

- Name, telephone number, and e-mail address of a contact person with authority to answer questions regarding the proposal (ideally the day-to-day project manager for this work).
- Name, address, and phone number of a contact person to be notified regarding contractual issues.
- Identification of the firm as a corporation or other legal entity.
- Amount of committed DBE participation

The letter shall state that the proposer:

- Has sole and complete responsibility for delivery of the required services.
- Is presently not debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from covered transactions by any federal department or agency or the Ohio Department of Transportation.

B.) ORGANIZATION, PERSONNEL, EXPERIENCE & PROJECT MANAGEMENT

Specific background information on key individuals who are anticipated to be assigned to the project should be included, most notably the project manager. Identify the location of the office where the majority of the work is to be performed. This section shall also provide an overview of each key personnel working on the project and show their relationship to the firm and their affiliations.

Note the general availability and capacity for those who will be involved in the project during the suggested time period (see Section E, *Project Schedule*).

Include a brief portfolio of past work that includes brand development, including examples of logos/taglines and development methods your firm used to develop a successful brand.

C.) FIRM'S WORK PLAN

This section shall indicate the firm's understanding of the project scope of work, a definition of the scope of the project (including a discussion of the tasks to be performed to accomplish the scope of work), a definition of the final product, and the firm's approach to the project (including the estimated time of completion for key tasks, phase deliverables, the management organizational chart, and identification of the firm's collaboration with OARC's participation in the project).

The firm's proposal shall contain a step-by-step explanation and description of the tasks to be employed and how the process addresses OARC's scope of work. The firm's proposal shall further contain a detailed level of effort. In addition, please explain any aspect of your method that is unique or innovative.

Also, administrative information, such as the firm's status reporting procedures and the firm's approach to effective communication with OARC personnel and subcontractors, shall be included.

D.) LIST AND DESCRIPTION OF DELIVERABLES

The firm's proposal shall list and describe the deliverables for each identified task that are part of the various steps of brand development. All materials created and submitted throughout the lifetime of the projects related to the contract shall become the property of OARC. All materials received shall be considered public information and shall be open to public inspection.

E.) PROJECT SCHEDULE

Included as part of the proposal, the proposer shall provide a schedule identifying all tasks and subtasks, all deliverables, and time in the scope of work. The project should be completed by **MARCH 17, 2017**. If the firm believes this will adversely affect the quality of the project, the firm should explain why, and provide their proposed revisions to the timeline.

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Proposed Timeline (provided interviews are not necessary to select the firm)
Proposals due on JANUARY 9, 2017
Selection and initial scope meeting the week of JANUARY 27, 2017
Target to begin work on JANUARY 30, 2017

F.) BUDGET OR COST PROPOSAL

The cost to complete this task shall not exceed \$15,000.

The proposer should be aware that it is the goal of OARC to process and pay properly prepared and submitted invoices within 60 days, although that is not guaranteed. Improperly prepared and submitted invoices will be returned and will consequently not be processed and paid within the 60-day goal. Proof of payment will be required for all charges included on invoices.

G.) OARC MINORITY BUSINESS ENTERPRISE (MBE) COMPLIANCE/SUBCONTRACTING

A 23 percent minority business enterprise (MBE) goal has been established for this contract per requirements of the Ohio Development Services Agency. This may be accomplished in a variety of ways, including the use of MBE subs. MBE firms must be certified by the State of Ohio as a minority business enterprise. The respondents must demonstrate a good faith effort to employ minority persons in the completion or cooperation of this project at or exceeding the above percentage. MORPC will require ongoing reporting of the MBE percentage during the contract life. MORPC will also include MBE prompt payment requirements in all contracts.

IV. PROCUREMENT PROCESS

RFP TIMELINE

The schedule for the RFP is given below. Dates are tentative and may be modified by OARC as necessary.

Key Date	Event
Monday, December 19, 2016	Proposal is posted on MORPC website for interested parties to retrieve.
Monday, January 9, 2017	Completed proposals due to OARC by 4:00 p.m.
Tuesday, January 10 - Friday, January 20, 2017	Evaluations of proposals.
Tuesday, January 17 - Thursday, January 19, 2017	Oral presentations, if necessary.
Friday, January 20, 2017	Evaluation Committee makes recommendation.
Monday, January 23, 2017	Contract preparation & processing
Friday, January 27, 2017	Contract finalized and signed
Friday, January 27, 2017	Contact all bidders regarding awards to be made
Monday, January 30, 2017	Project begins.
Friday, March 17, 2017	Project completion.

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The selection of the project firm will follow a multi-step process. The first step will be an evaluation of the written proposals using the criteria listed below.

EVALUATION CRITERIA

The evaluation criteria are as follows:

- 1. General Quality & Adequacy of Response (15 %)**
 - a. Completeness and thoroughness
 - b. Overall impression

- 2. Organization, Personnel, Experience & Project Management (35 %)**
 - a. Qualifications and experience of proposed personnel, including project manager
 - b. Relevant knowledge, skills & experience with the project
 - c. Experience working with similar clients
 - d. Demonstrated capacity to do the work
 - i. Significant brand development experience as demonstrated through portfolio of projects
 - ii. Capacity to coordinate and administer the project alongside 7+ agencies throughout Ohio as demonstrated by past work experience

- 3. Work Plan (25 %)**
 - a. Presents a clear understanding of the Scope of Services (*Section II*) and suggested tasks to accomplish the Scope
 - b. Quality of services to be rendered
 - c. Approach to brand development, including the ability to derive creative solutions.
 - d. Addresses expected outcomes:
 - i. Identifies who will do the work
 - ii. Includes realistic & sufficient timelines

- 4. Cost/Budget (25 %)**
 - a. Clarity of budget and congruence with RFP and proposed scope of work
 - b. Cost

EVALUATION COMMITTEE

The Selection Committee will conduct the evaluation of proposals and reserves the right to reject any and all proposals in whole or in part received in response to this request. The Committee may waive minor defects which are not material when no prejudice will result to the rights of any other firms or to the public.

The second step would include clarification interviews. Depending upon the relative merits of the proposals, two or three of the firms will be invited to give an oral presentation and respond to questions from an interview panel. The second step may be waived if the Committee finds from the evaluation in the first step that one team is clearly more qualified to address OARC's needs than the other teams.

CLARIFICATION INTERVIEWS

At OARC’s option, firms may be required to answer questions about their proposals. During this time, the firm will be expected to perform live presentations of their system’s capabilities. This may take place during a live demonstration at MORPC, or via webinar. The purpose of the interview is to provide clarification of information presented in the written proposal. If interviews are necessary, OARC will contact the firm’s authorized representative to schedule the time, date, and method of interview (e.g. in-person presentation or webinar). Interviews are currently scheduled to take place January 17 – January 19. The interviews will be given by the Selection Committee. If in-person interviews are requested, the firm must comply at no cost or obligation to OARC. A firm’s refusal to make a presentation as described shall result in the firm’s proposal being rejected from consideration for the project.

SELECTION AND NEGOTIATIONS

Based on the evaluation of the proposals, the firm who best demonstrates their ability to address OARC’s needs will be selected. If negotiation with the highest ranked firm fails to result in a mutually acceptable agreement, OARC will notify that firm in writing of the termination of negotiations. The next highest ranked firm, as determined by the earlier technical proposal evaluation, will then be invited to enter into negotiations with OARC. If negotiations again fail, the same procedure shall be followed, with each next most qualified firm until a contract has been negotiated. If the remaining proposals are considered not to be qualified, the notification and selection processes will be repeated.

V. ADMINISTRATIVE & ORGANIZATIONAL ELEMENTS

REPORTING

Closeout Report & Style Guide

The Closeout Report & Style Guide shall be provided in electronic format. All components of the Report would be combined into a single file in Microsoft Word and Adobe Acrobat (PDF) format.

VI. PROPOSAL TERMS & CONDITIONS

Evaluation of Proposal Compliance with Specifications

Understanding that no firm may completely meet all requirements of the specifications, OARC reserves the sole right to determine whether a proposal substantially complies with the specifications; accept, negotiate modifications to, or reject the terms of any proposal; and waive the right to accept a part, or parts, of a proposal, unless otherwise restricted in the proposal.

Modification and/or Withdrawal of Proposals

Modifications of a submitted proposal must be received by the designated due date specified. Withdrawal of proposals will be allowed only in those cases in which a written request to withdraw a Proposal is received by OARC prior to the date and hour for receiving and opening Proposals. In such case, same will be returned to firm unopened.

Proposer Qualifications

OARC may require all proposers to submit evidence of qualifications, and may consider any evidence of the financial, technical, and other qualifications and abilities. OARC will not award a contract to a

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proposer who, in its opinion, is not fully qualified on the basis of financial resources and responsibility, possession of adequate equipment, personnel, experience, and past record of performance to perform the obligation to be undertaken competently and without delay.

Award of Contract

Each firm acknowledges that OARC will use its discretion and judgment in making the final decision and further acknowledges that no claim by the firm will arise in any way relating to the exercise of that judgment by OARC. OARC reserves the right to accept the Proposal deemed to be in the best interest of OARC or to reject any and all Proposals.

MORPC's Executive Director is the only individual who may legally commit OARC to the expenditure of public funds. No cost chargeable to the proposed contract may be incurred before receipt of either a fully executed contract or a specific, written authorization to proceed.

GENERAL INFORMATION & REQUIREMENTS

Compliance with US DOT Regulations

The project MAY BE funded from federal funds. Consequently, the firm must comply with all U.S. Department of Transportation regulations pertaining to federal transportation planning studies. firm will be required to comply with all regulations of U.S. Department of Transportation relative to, for example, non-discrimination in federally-assisted programs.

Ownership of Products

OARC will retain the copyright for all data, materials, information, processes, studies, reports, surveys, proposals, plans, codes, scientific information, technological information, regulations, maps, equipment, charts, schedules, photographs, exhibits, software, software source code, documentation, and other materials and property that are prepared, developed or created under or in connection with this project. Therefore the submitter should anticipate that all products of this work effort will become the property of OARC who will make them available to other government agencies and their contractors.

Deviation Clause

The firm's attention is called to the condition that, if awarded a contract, the firms will be required to furnish the particular item referred to in strict accordance with the specifications or descriptions as proposed, unless a departure or substitution is clearly noted and described in the proposal, along with the reasons therefore.

Tax Exemption

OARC is exempt from the payment of federal excise and transportation taxes levied under the provisions of the Internal Revenue Code. OARC is also exempt from Ohio State Gross Retail (sales tax). The successful firms will be furnished with any certificates of exemption required.

OARC STATEMENTS ON DIVERSITY & INCLUSION

Equal Opportunity

The firm agrees that it will not discriminate against any employee, applicant for employment, or sub-contractor and that it will take affirmative action to insure that employees, applicants and sub-contractors are treated equally during employment without regard to race, color, gender, creed, religion,

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ancestry, national origin, sexual orientation, disability or other handicap, age, marital/familial status, veteran status, or status with regard to public assistance.

Disadvantaged Firms

Disadvantaged firms shall have the maximum opportunity to participate in the performance of contracts financed under this solicitation. In this regard, all proposers shall take all necessary and reasonable steps to ensure that minority firms have the maximum opportunity to compete for and perform any subcontracts. Also, proposing firms are encouraged to notify OARC if they meet one of the disadvantaged firm designations, such as Minority Business Enterprise (MBE), Small Business Enterprise (SBE), or Women-owned Business Enterprise (WBE).

CONTRACTING REQUIREMENTS

The following are not part of the proposal requirements but will be requirements in the contract in addition to other contractual requirements. *Please also note, the firm selected for negotiation must provide average hourly rates for personnel assigned.*

Compensation

A not-to-exceed contract amount based on satisfactory work performed and products and services produced will be entered into after negotiations between OARC and the selected firm.

Alternative compensation models may be considered.

During contract negotiations, the selected firm must provide individually-priced and prioritized tasks to be completed "if authorized." The sequencing of work tasks must be done in such a way that successful completion of earlier tasks is not dependent upon the completion of later tasks.

Cancellation

OARC reserves the right to cancel any contract for failure or refusal of performance, fraud, deceit, misrepresentation, collusion, or any other misconduct on the part of the firm.

Unresolved Finding for Recovery

The selected firm affirmatively represents and warrants to OARC that it is not subject to a finding for recovery under ORC 9.24 or that it has taken appropriate remedial steps required under ORC 9.24 or otherwise qualifies under that section. The firm agrees that if this representation or warranty is deemed to be false, the agreement shall be void *ab initio* as between the parties to this agreement, and any funds paid by OARC to the firm hereunder shall be repaid to OARC immediately, or an action for recovery may be commenced immediately by OARC for recovery of said funds.

Covenants of Firm

The firm will be required to covenant and warrant the following:

- a) Firm is not debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in any contract, supported in whole or in part by the funding sources for this project;
- b) Firm has not within a three (3) year period had one or more public transactions terminated for cause or default;

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- c) Firm will comply with the provisions of Section 1352, Title 31 of the U.S. Code, which prohibits the use of federal funds to lobby any official or employee of any federal agency, or member or employee of Congress; and to disclose any lobbying activities in connection with federal funds.