



## **Request for Proposal: Marketing / Communications Services**

**Release Date:** Monday, May 24, 2021

**Deadline:** Friday, June 4, 2021 at 12:00pm EDT

### **Overview**

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#### **Who Are We?**

OCALI, a project of the Educational Service Center of Central Ohio (ESCCO), is a recognized global leader in creating and connecting resources and relationships to ensure that people with disabilities have the opportunity to live their best lives for their whole lives. OCALI informs public policy and develops and deploys practices grounded in linking research to real life.

As a trusted source, OCALI enhances, develops, and promotes high-quality programs and services to effectively equip anyone who cares for, supports, educates, employs, or works with individuals with disabilities across the lifespan.

OCALI's organizational structure includes ten Centers that collectively focus on local and statewide-capacity building while strengthening policies and resources that guide services and supports for people with disabilities, as well as for families, educators, service providers, and professionals.

Additionally, in its commitment to narrow the gap between state policy and its translation to "boots-on-the-ground", OCALI has an established Office of Policy and Stakeholder Engagement to keep OCALI informed and connected to the goals, priorities, and initiatives of state agencies, diligently working to align field practices to state policy.

OCALI hosts a highly-regarded annual conference of autism and disabilities leaders from across the nation and around the world. OCALICON provides a gathering of state and national leaders, educators, parents, service providers, self-advocates, scholars, and policy makers focused on common concerns and shared proven solutions addressing issues and challenges experienced by people with autism, sensory disabilities, and low-incidence disabilities across their lifespan.

Based on a respect for people with autism and low incidence disabilities and our belief in their right, need, and desire to achieve their full potential, OCALI inspires change and promotes access to improve their outcomes through leadership, training and professional development, technical assistance, collaboration, and technology.

#### **Statement of Purpose**

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The purpose of this Request for Proposal (RFP) is to obtain competitive proposals from companies qualified and interested in supporting OCALI's communications and marketing efforts.

#### **Intellectual Property**

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The ESCCO on behalf of OCALI is the sole owner of all content and materials developed under this RFP. OCALI retains the distribution rights to any content or materials to exercise as it deems appropriate. Selected evaluators may not use, reuse, distribute, publish, or base derivative works upon such materials without the express, prior written consent of the ESCCO.

### **Renewal Fiscal Year 2023**

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While this proposal is for the fiscal year 2022 (July 1, 2021 – June 30, 2022), the contractor for this year will be given priority consideration for a fiscal year 2023 partnership (July 1, 2022 – June 30, 2023), provided that proposal commitments are met.

### **Request for Proposal**

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The ESCCO on behalf of OCALI seeks a proposal for marketing and communications services. These services must fulfill the following:

- Strategic consulting to support executive thought leadership, internal communications, and organizational culture; guide policy communications, such as message and material development to inform state agencies and representatives; and heighten business development efforts and stakeholder engagement.
- Working alongside the OCALICON team, lend support to the creation of key messaging, event communications, and marketing plans/goals, as well as assist efforts onsite at the conference.
- Assistance with the development and implementation of strategic public relations, public engagement, and marketing plans targeting a range of audiences locally and nationally.
- Overall Marketing/Communications leadership, planning, and support, such as identifying, analyzing and using data to inform communications; expanding messaging and reach; prioritizing audiences; growing social media efforts: building strategy and communications for identified projects and campaigns: coordinating article development and participating in the review of organization newsletter; and implementing media relations activities. Plan and implement social media accounts and campaigns and provide graphic design support.
- Leverage partner outreach and engagement across Ohio and in other states.
- General project management support through meeting attendance and participation, guiding efforts of the OCALI's marketing and communications, assessing and proposing internal communications/marketing systems and procedures, and email/phone correspondence with OCALI leadership and staff.

### **Requirements for Proposal Preparation**

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Please submit the following as part of the official proposal (organize and label sections accordingly). The submission will become the basis on which OCALI will judge the applicant's ability to perform the services included in the RFP.

1. Technical Proposal: (Organize and label sections accordingly)
  - A. Cover page, including company name, contact information, company biography and proposal summary signed by the respondent;
  - B. Narrative Plan: Communicates approach to delivering services requested, proposed timeline for execution and support, commitment to understanding OCALI's vision and providing services that align with our mission and core function, ability to work collaboratively with client teams and other vendors, and method to project management;

- C. Organizational Capacity: Resumes and/or summary biographies of the key project personnel with detailed description of their roles related to the work; description of any subcontractors and their work, including but not limited to resumes and/or summary biographies;
- D. Recommendations: Two professional references/letters of recommendation from two current clients similar work and customers as OCALI. Current shall mean references for whom the vendor has performed work within the past 12 months. Organization name and contact information must be provided.

2. Cost Proposal:

- A. Pricing structure – outline pricing for services required to meet the requested items.
- B. Contract agreement – provide sample contract language typically used by your organization.

PLEASE NOTE:

- Responses must follow the prescribed format or they shall be deemed non-responsive. Incomplete or late responses may be removed from consideration.
- The cover page must be signed by the respondent.
- Proposals should be prepared simply and economically, avoiding the use of elaborate promotional materials beyond those sufficient to provide complete presentation.
- Any proprietary material submitted with the proposal that is considered confidential by the bidder must specifically be so identified, and the basis for such confidentiality must be specifically set forth in the proposal.
- Submission of quote does not constitute any type of binding Agreement or Contract between ESCCO/OCALI and respondent.
- ESCCO/OCALI assumes no responsibility for any cost incurred in developing a response to this RFP.
- ESCCO/OCALI reserves the right to accept or reject responses to this RFP at its sole discretion.
- ESCCO/OCALI’s decision is final with respect to the awarding of this Contract.

**Proposal Submission**

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Email electronic copies of the proposal Nathan Ticknor, [Nathan\\_ticknor@ocali.org](mailto:Nathan_ticknor@ocali.org). Please label clearly in the subject line to clarify if it is a response to the RFP. The proposal must be received by **Friday, June 4, 2021 by 12:00 pm EDT**.

Questions about this RFP should be submitted in writing to [Nathan\\_Ticknor@ocali.org](mailto:Nathan_Ticknor@ocali.org) by **3:00 pm EDT on Thursday, May 27, 2021**. Please use the subject line Marketing / Communications Services RFP.

**RFP Process Schedule**

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Monday, May 24, 2021 :	Release of RFP
Thursday, May 27, 2021:	Final Date for Receipt of Questions by 3:00 pm EDT
Friday, May 28, 2021:	Final Date for Official Responses to Questions
Friday June 4, 2021 :	Proposals Due by 12:00 pm EDT
Wednesday, June 9, 2021:	RFP Award Announced

**Duties**

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Contractor shall hold himself/herself/itself available to render, and shall render at the request of the ESCCO/OCALI, the services set forth in the scope of work above for the benefit of the ESCCO/OCALI. Contractor shall devote such time as may be reasonably required to perform Contractor's duties under the contract. Contractor will maintain, for the duration of the Contract, any certificate or license required by law to perform the services required by this RFP.

Contractor shall perform all services with reasonable care, skill, and diligence as would normally be provided by an experienced consultant and in accordance with industry standards.

### **Other Requirements Include**

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Contractor must provide a W-9 with a valid EIN or be registered with the Ohio Secretary of State.

Contractor must complete the Standard Affirmation & Disclosure Form to abide with Executive Order 2011-12K affirming no services of the contractor or its subcontractors under this Contract will be performed outside the United States.

Contractor shall secure professional liability insurance and any other insurances required by law.

At the Contractor's sole cost, Contractor shall maintain a comprehensive knowledge regarding technologies required to meet the terms of the contract. Contractor shall, at all times during the term of this Contract and at Contractor's own expense, comply with all applicable federal, state, and local laws, rules and regulations, and shall maintain in force all licenses and permits required for performance under this Contract.

Contractor shall be responsible for the purchase and use of all equipment necessary to perform the Services, except that ESCCO/OCALI may elect to provide Contractor access to a computer and/or computer network in order to facilitate Contractor's secure access to, and provision of, information related to the performance of Contractor's duties and to facilitate communication with ESCCO/OCALI. Any access to or use of ESCCO/OCALI computers or computer networks shall be subject to all ESCCO/OCALI policies governing such use by ESCCO/OCALI employees.

### **Finding for Recovery**

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Contractor represents that he/she/it is not subject to any unresolved findings for recovery resulting from an audit conducted by the Auditor of State between January 1, 2001 and the present time. Contractor further represents that neither the Contractor nor any of its principal officers are listed in the Auditor of State's database of persons' subject to such findings.

### **Evaluation**

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Selection of Contractor will be based on the following criteria:

- Name, position, and contact information for one primary contact.
- Narrative response describing how the Applicant would use its expertise to meet the objectives outlined in the scope of work.
- Narrative response describing the Applicant's competence to perform the required services as indicated by the education and experience of the Applicant's personnel, especially the education and experience of the employee(s) who would be assigned to perform the services.
- Ability in terms of workload and availability of qualified personnel to perform the required services competently.
- Evidence of successful implementation of services similar to the scope of work outlined, provided

within the last 12 months.

- Evidence of knowledge and experience in providing products/services that meet the needs of people with disabilities, as well as a commitment to fostering an inclusive and accessible environment.
- Recommendations/references from a minimum two (2) current or previous clients.
- Overall cost of products/services.

Additional considerations:

- Ohio-based business OR business located outside Ohio but with a local office.
- Prior work with OCALI or a similar organization.
- Knowledge of Ohio agencies, systems, initiatives, and/or policies impacting the population served by OCALI.

At its discretion, the ESCCO/OCALI is not required to select the Contractor that submits the lowest cost proposal for providing the services. Instead, the ESCCO/OCALI intends to select the Contractor submitting the proposal deemed by the ESCCO/OCALI to be in the ESCCO/OCALI's best interest. In making its selection, the ESCCO/OCALI may consider any other information, including information not requested in this RFP or not included in the proposals received.

In the event the ESCCO/OCALI is unable to negotiate a satisfactory contract with the top ranked Contractor, the ESCCO/OCALI may terminate negotiations with that Contractor and enter into negotiations with the Contractor submitting the proposal ranked next best. This RFP is not and shall not be construed as an offer of a contract by the ESCCO/OCALI. Any contractual arrangement will be evidenced solely by a Contract authorized by the ESCCO/OCALI.

### **Notification**

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All applicants will receive notification of the awarded contract by **Wednesday, June 9, 2021**. Notification will be sent to the primary contact by email.

The ESCCO/OCALI reserves the right to reject any and all proposals where the contractor takes exception to the terms and conditions of the RFP or fails to meet the terms and conditions, including but not limited to, standards, specifications, and requirements as specified in the RFP.

The ESCCO/OCALI reserves the right to reject, in whole or in part, any and all proposals where the ESCCO/OCALI, taking into consideration factors including but not limited to, price and the results of the evaluation process, has determined that award of a contract would not be in the best interest of the ESCCO/OCALI or the state. Other factors may include:

- Past performances as reflected by the evaluations of previous clients with respect to factors such as control of costs, quality of work, meeting of deadlines, and other similar factors;
- The services offered are not in compliance with the requirements, specifications, and terms and conditions set forth in the RFP;
- Pricing offered is considered to be excessive in comparison with existing market conditions or exceeds the available funds of the state; or
- It is determined that award of a contract would not be in the best interests of the state.

The ESCCO/OCALI may award a contract in whole or in part to one or multiple contractors. Notice of any potential partial and/or multiple party award(s) shall be provided in the RFP.