

**Request for Proposals (“RFP”)
For
Marketing/PR/Advertising Services**

This RFP is Being Issued by:

Ogden Preparatory Academy

1415 Lincoln Ave

Ogden, UT84404

Date of RFP Issue: August 3rd, 2018

Deadline to Submit Proposals: August 17th, 2018

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I – KEY DATES

A. Date of RFP Issue: August 3rd, 2018

B. Deadline to Submit Proposals: August 17th, 2018

C. Opening of Proposals: August 20th, 2018

D. Review of Submitted Proposals: August 20th, 2018 through August 24th, 2018

E. Short list/Interviews scheduled with committee: Week of August 27th, 2018

F. Anticipated Contract Award Date: Board Approval by the end of September 2018

G. Anticipated Contract Term: 1-3 years. Not to exceed five years.

H. Commencement of Services: October 1st, 2018

II – GENERAL INFORMATION

A. Introduction. Ogden Prep, or OPA, is the first charter school based in Ogden, Utah. It was built with the idea that children should have an affordable quality education in a safe, nurturing environment. A charter school allows parents a choice in free public education for their child. Ogden Prep offers a public school education but with private school quality. That includes uniforms, discipline, 25-child class sizes, and employee accountability (with the power to hire and fire as necessary). Parents are expected to volunteer and be active in the school, which has shown to be a major benefit to a child's interest in school and willingness to learn. An emphasis is placed on mastery of reading and math skills, with expectations for students held high.

OPA, through a bilingual education, exposes all students in grades K-9 to Spanish as a second language. One of the goals of the school is to produce learners who are literate in both these languages. All curriculum course offerings are aligned with the Utah State Core Curriculum and UPASS tests. The curriculum addresses the needs of each language group including: primary language development, second language acquisition, development of cognitive language and literacy skills, and the development of cross-cultural understanding.

B. Past Services. In house.

C. Purpose of RFP. The purpose of this RFP is to solicit marketing/PR/advertising services from reputable, experienced, and skilled agencies. Specifically, OPA is seeking proposals from marketing/PR/advertising agencies to create a sound marketing plan that combines knowledge of charter schools and student recruitment strategies to promote OPA, increase OPA's student enrollment, and to raise the general awareness of OPA in Ogden and across the state of Utah. Strategies to accomplish this goal could include but are not limited to search engine optimization, thought leader appearances for OPA administrators and staff, social media campaigns, and well-branded collateral pieces.

E. Award of Contract. The contract will be awarded to the offeror whose proposal is determined to be the most advantageous to OPA, taking into consideration all substantive evaluation criteria outlined in this RFP as well as cost. No other criteria will be used in the evaluation. Please note that the Utah Procurement Code requires that most cost information be evaluated independently from the substantive evaluation criteria. The final determination shall be in writing and shall be determined at the sole discretion of OPA's Board of Directors. The contract file will contain the basis on which the award is made. However, to the extent permitted by law, OPA may reject any and all proposals and may waive any informality or technicality in any proposal received if OPA's Board of Directors determines it would serve the best interests of the School. For cost reasons, the marketing committee may choose certain items to be completed in house.

F. Term of Contract. In the interest of maintaining continued services, reducing administrative burdens in procuring, negotiating, or administering contracts, and potentially obtaining a volume or term discount, OPA intends to award a contract for marketing/PR/advertising services for a period up to, but not to exceed, five (5) years. However, the contract must contain termination and/or renewal provisions acceptable to OPA as well as include the provisions in Utah Code Ann. § 63G-6a-1204(3)-(5) applicable to the contract. 5

G. Written Contract. If selected by the OPA's Board of Directors, the successful offeror must be prepared to enter into a written contract consistent with the acceptable services, terms, and conditions outlined in the successful proposal and the requirements set forth in this RFP. In addition, the written contract must incorporate the below-described "Disclaimer & Acknowledgment" and contain financial terms that require regular payments from OPA on a monthly basis.

H. Disclaimer & Acknowledgement. Authorization to continue operating OPA as a Utah public charter school is expressly contingent on OPA's charter not being terminated by the Utah State Charter School Board. OPA reserves the right to cancel any and all marketing/PR/advertising contracts executed pursuant to this RFP in the event the School's charter is terminated for any reason. All offerors must agree to cancellation of said contracts and to hold OPA, its directors, officers, employees, and agents harmless for any loss of potential profits and costs/expenses incurred in the event the School's charter is terminated for any reason. Submission of a proposal in response to this RFP shall be deemed an acknowledgment and consent by the offeror to the cancellation provisions contained in this paragraph.

III – PROPOSAL INFORMATION

A. Proposals must be submitted in compliance with **Section IV** of this RFP. Proposals not submitted in compliance with **Section IV** of this RFP may not be considered.

B. The content of a proposal must address the specifications described in **Section V** below. Only one proposal from each offeror may be submitted and considered. Offerors may include in their proposals any special or unique services they plan to provide.

C. Submission of a proposal will be construed to mean that the offeror understands the requirements contained herein and that the offeror anticipates being able to supply the described services for the pricing proposal contained in their submitted proposal.

D. As stated above, proposals will be opened by the marketing committee the week of August 20th. Offerors will be notified if they are short listed by August 25th. Please be available the week of August 27th to complete an interview with the Marketing Committee 4pm-7pm. OPA will cooperate with all potential offerors, to the extent reasonably possible, in their attempt to obtain information.

E. OPA's Evaluation Committee will, for the purpose of assuring full understanding of and responsiveness to the RFP's requirements, conduct interviews with, or attend presentations by, offerors who submit proposals. Offerors may be required to sign a non-disclosure agreement in connection with such activities.

F. It is understood that OPA's issuance of this RFP does not obligate OPA to accept any of the proposals submitted in response to this RFP, nor does it guarantee that OPA will in fact accept any of the said proposals. To the extent permitted by law, OPA's Board of Directors reserves the right to accept or reject any or all proposals and/or to waive any or all formalities in any proposal or in the proposal process deemed to be in the best interest of OPA. No agreement exists on the part of OPA and any offeror until a written contract is approved and executed by OPA's Board of Directors and the offeror.

G. This RFP does not obligate OPA to pay for any costs of any kind whatsoever that may be incurred by an offeror/respondent or any third parties in connection with a proposal. All submitted proposals, responses, and supporting documentation shall become property of OPA. Further, OPA shall not be liable to any offeror, person, or entity for any losses, expenses, costs, claims or damages of any kind arising out of, by reason of, or attributable to, the offeror responding to the RFP.

H. At any time during the evaluation process, OPA's Evaluation Committee may, with appropriate approval, request best and final offers, as provided for in Utah Code § 63G-6a-707.5, from responsible offerors who submit responsive proposals that meet any minimum qualifications, evaluation criteria, or score thresholds identified in this RFP.

IV – PROPOSAL REQUIREMENTS

Potential offerors are hereby invited to submit a proposal for marketing/PR/advertising services for OPA.

A. **Cover Letter.** It is mandatory that each proposal contain a cover letter which includes the following:

1. A statement of the offeror's intent to provide the services outlined in the proposal;
2. The legal company name of the offeror;
3. The complete company address;
4. The company contact person's name, phone number, and email address;
5. The company's website address;
6. The signature of the company's authorized representative, including position/title; and
7. The date of submission.

B. **Specifications.** Proposals must address the Proposal Specifications set forth below in **Section V**.

C. **Proposals must be delivered by hand or mail by Friday August 17th by 4pm to the secondary school building at 1415 Lincoln Ave. Ogden, UT 84404. The secondary building is the Building to the west.**

- A. **Instructions for Hand-Delivered Proposals:** Proposals provided by hand-delivery must be in writing and separated by cost and non-cost related information. All non-cost related information of a proposal (the information provided by an offeror in response to **Section V(A)(1)-(4)**) must be contained in a sealed envelope that includes the phrase "Non-Cost Related Information for Marketing/PR/Advertising Proposal." All cost-related information of a proposal (the information provided by an offeror in response to **Section V(A)(5)(a)**) must be contained in a different sealed envelope that includes the phrase "Cost-Related Information for Marketing/PR/Advertising Proposal." No cost information may be submitted in the sealed envelope identified as "Non-Cost Related Information for Marketing/PR/Advertising Proposal."
- B. **Interactive Content.** Proposals may include interactive content. Such content may be burned to a CD or set up on a password protected web-based platform. A CD containing such interactive content must be hand-delivered with a proposal in accordance with **Subsection (C)(1)** above.
- C. **Proposals must be signed by the offeror and include the following certification:**
"The statements made in this proposal are true and correct representations. If selected, [offeror] shall negotiate in good faith with Ogden Preparatory Academy."

Protected Information. Protection of disclosure of information submitted by an offeror in response to this RFP is governed by Utah's Government Records Access and Management Act in Utah Code Ann. § 63G-2-101 *et seq.* An offeror that desires to request protected status of any information submitted in the offeror's response to this RFP must specifically identify the information that it desires to protect and the reasons that the information should be afforded protected status under the law. In making this request, the offeror shall comply with the requirements in Utah Code Ann. § 63G-2-305, Utah Code Ann. § 63G-2-309, and all other applicable requirements of law. OPA's decision regarding the protected status of information shall be final and binding on the offeror. Submission of a proposal in response to

this RFP shall be deemed an acknowledgment and consent by the offeror that the offeror agrees with this paragraph and will indemnify, defend, and hold harmless OPA, its members, directors, officers, staff, and agents from any and all liability relating to the disclosure of information included in the offeror's response to this RFP, even if the offeror requested protected or other confidential status for the information.

V – PROPOSAL SPECIFICATIONS

A. Content of Proposals. Offerors must address the following in their proposals:

1. Description and Past Experience of Agency.

a. Provide description of the nature of your agency's services and activities. Note your agency's history within the education arena, specifically regarding charter schools and student recruitment, if any.

b. List all schools, districts, and education-related clients (if allowed) for whom your agency has performed work during the past 12 months, and certify that there is no conflict of interest between any existing contract or client relationship and the ability of your agency to fully and vigorously represent the marketing and advertising needs of OPA. Client relationships that could potentially be a conflict of interest must be listed together with a discussion of how your agency will resolve the potential conflict of interest.

c. Disclose whether your agency or its clients have received any warning, sanction, criticism, fine, or similar reprimand from any regulatory agency (i.e. FTC, FDA, etc.) for the work performed by your agency. Also disclose whether any of your agency's owners, officers, employees, or agents have ever been subject to the same type of reprimand or scrutiny. If not, provide a clear statement to that effect.

d. List out which services your agency does in-house and which ones it out-sources to other agencies. If your agency works with other agencies to provide some services, please include them in your personnel and management overview described below, as well as their experience in the relevant categories.

2. Personnel/Management.

a. Identify all individuals on your agency's account team who will manage the contract work.

b. Describe each individual's overall experience and skill in education related accounts, including internet/interactive experience, experience related to social networking, viral campaigns, grassroots online marketing campaigns, and driving user generated content submissions. Provide each individual's current resume/biography.

c. Provide each individual's education, experience, and expertise with pertinent information demonstrating qualifications for successfully carrying out a proposal submitted in response to this RFP.

3. Evaluation, Proposed Marketing Plan, and Case Studies/Examples

- a. Evaluate Ogden Preparatory Academy's current web assets. Discuss your findings.
- b. Provide a comprehensive overview showing how your agency measures success for all online activities.
- c. Provide a proposed annual marketing plan that demonstrates how your agency would, using its knowledge of and experience with charter schools and student recruitment strategies, promote OPA, increase OPA's student enrollment and retention, increase OPA's brand recognition, and raise the general awareness of OPA across the state of Utah. The proposed annual marketing plan should address and explain in detail a variety of plans and strategies, such as:

1. Communication planning;
2. Public relations;
3. Marketing communications;
4. Media planning and buying;
5. Search engine optimization;
6. Social media campaigns;
7. Video ad campaigns;
8. Online graduation campaigns;
9. Branding;
10. Print advertising and marketing;
11. Digital advertising and marketing;
12. Email marketing;
13. Broadcasting (radio and television); and
14. Thought leader appearances for OPA administrators and staff;

d. Case Studies/Examples: In addition to receiving a proposed annual marketing plan for OPA, OPA is also interested in hearing what your agency has done for other schools and education-related clients in the past. Include examples of past campaigns that you have run for any education-related or comparable clients, as well as any other clients that may have a partnership opportunity for OPA as it relates to the skill set above. Examples should showcase new interactive technology and savvy use of multi-prong marketing approach (radio, print media, direct mail, SEO, etc.) to meet clients' objectives. This can be done in the form of case studies, or you can show specific examples for each of the skills. Each example should be supported with how success was measured.

4. Financial Stability.

- a. Provide evidence of your agency's financial stability.

5. Pricing.

a. Provide the total anticipated annual price to be charged by your agency to execute its proposed annual marketing plan for OPA. Break out and identify all costs of the proposed annual marketing plan, including individual project costs and your annual account management fee.

b. OPA understands that because it has not agreed to any specific annual marketing plan, all pricing proposals submitted by offerors in response to this RFP will only be reasonable estimates and anticipated fees and costs. Final pricing to be charged by the winning offeror will be agreed upon after further negotiations and planning and will be included in the written contract entered into by OPA's Board of Directors and the winning offeror.

B. Selection and Scoring. Selection of a marketing/PR/advertising agency will be based on offerors' responses to these proposal specifications in relation to the Evaluation Criteria set forth in **Section VI**. The successful proposal will address each of the required specifications and clearly demonstrate how the offeror will meet or exceed OPA's marketing/PR/advertising needs. The Evaluation Criteria set forth in **Section VI** contains a numerical score for each of the proposal specifications and proposals will be ranked based on their score. The Evaluation Criteria Unrelated to Cost will be subjectively scored by OPA's Evaluation Committee based on offerors' responses to the specifications contained in **Section V(A)(1)-(4)**. The Evaluation Criteria Related to Cost will not be scored by OPA's Evaluation Committee but will be scored independently by OPA's Cost Evaluation Committee using the following formula: total cost points possible x 2 – (proposal price being evaluated/lowest proposed price). The offeror with the lowest proposed price (which proposed price is provided by offerors in response to the specification in **Section V(A)(5)(a)**) meeting the requirements of the RFP will receive 100% of the cost points (25) and all other offerors will receive a portion of the cost points based on the formula above.

VI – EVALUTION CRITERIA

Evaluation Criteria Unrelated to Cost

A. **Offeror’s Description and Past Experience (20 points possible)**. This criterion is based on the information provided in response to the specifications contained in **Section V(A)(1)**.

B. **Offeror’s Personnel and Management (20 points possible)**. This criterion is based on the information provided in response to the specifications contained in **Section V(A)(2)**.

C. **Offeror’s Evaluation of OPA, Proposed Marketing Plan, and Case Studies/Examples (25 points possible)**. This criterion is based on the information provided in response to the specifications contained in **Section V(A)(3)**.

D. **Offeror’s Financial Stability (10 points possible)**. This criterion is based on the information provided in response to the specifications contained in **Section V(A)(4)**.

Evaluation Criteria Related to Cost*

E. **Pricing (25 points)**: This criterion is based on the pricing proposal provided in response to the specifications in **Section V(A)(5)(a)**.

Total points possible based on Evaluation Criteria: 100 points

* **NOTE:** Cost will be scored independently from the substantive evaluation factors.