

2021 REQUEST FOR PROPOSALS (RFP)

TITLE OF RFP:	Request for Proposals for Marketing and Communications Services		
Agency:	Iowa Economic Development Authority		
State seeks to purchase:	IEDA is seeking proposals from qualified experienced entities for the planning and execution of its strategic marketing and communication efforts.		
Initial term of the contract:	Approximately 10 months	Possible extensions: 2	
Anticipated Contract term - Beginning:	On or about September 1, 2021	Ending:	On or about June 30, 2022
State Issuing Officer:	Staci Hupp Ballard, Chief Strategic Communications Officer		
Email:	Staci.Ballard@IowaEDA.com		
Address:	1963 Bell Avenue, Suite 200, Des Moines, IA 50315		
PROCUREMENT TIMETABLE—Event or Action:		Date/Time (Central Time):	
IEDA Issues RFP		May 14, 2021	
Questions Due:		May 21, 2021 / 5:00 PM CST	
Response to Questions on or before:		June 1, 2021 / 4:00 PM CST	
Proposals Due Date:		June 15, 2021 / 4:00 PM CST	
Finalists notified		June 30, 2021 / 4:00 PM CST	
Presentations by finalists		Week of July 19, 2021	
Advisory Committee recommendation to IEDA Board		August 20, 2021	
Successful vendor notified/announced:		August 20, 2021	
Anticipated Date to execute contract:		On or about September 1, 2021	
<p>Proposals will be accepted electronically at:</p> <p>93b57295.iowa1.onmicrosoft.com@amer.teams.ms</p>			

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Section 1 Introduction**1.1 Purpose**

The Iowa Economic Development Authority (IEDA) is soliciting proposals from qualified experienced entities for the planning and execution of its strategic marketing and communication efforts. IEDA is seeking a vendor(s) to work with its professional and experienced staff to continue and advance the state's integrated marketing efforts to achieve the objectives described in Section 1.2 below.

Vendors may submit proposals on any or all of the Services Elements described in Section 3. IEDA will entertain, and in fact encourages, partnerships among providers. IEDA reserves the right to award components of the contract to various bidders. IEDA will require the selected providers to work together, in concert with its in-house communications and marketing division, in order to leverage the state's overall brand identity, better develop messaging that is consistent across audience groups, and to create administrative efficiencies.

IEDA intends to award a one (1) year contract or contracts (if multiple vendors are selected). The contract period is September 1, 2021 - June 30, 2022, with options to renew for one year on July 1, 2022 and on July 1, 2023. The options to renew are at IEDA's sole discretion. Any contracts resulting from the RFP shall not be exclusive contracts.

The total amount of the contract(s) resulting from this RFP is not yet known. This figure will be determined based on final IEDA appropriations from the Iowa Legislature and budget allocation approval by the IEDA Board. Based on previous expenditures, the total annual billing amount is expected to be approximately \$4-6 million, inclusive of advertising buys, sponsorships, material production and mailing, which are billed at cost.

1.2 Background Information

This RFP is designed to provide vendors with the information necessary for the preparation of competitive bid proposals. The RFP process is for IEDA's benefit and is intended to provide IEDA with competitive information to assist in the selection process. It is not intended to be comprehensive. Each vendor is responsible for determining all factors necessary for submission of a bid proposal in line with the instructions outlined within this RFP.

Iowa Economic Development Authority

IEDA's mission is to strengthen economic and community vitality by building partnerships and leveraging resources to make Iowa the choice for both people and business. For more information about IEDA's programs, visit IEDA's website at iowaeda.com.

IEDA Marketing and Communications Efforts

IEDA's Marketing and Communications Division, which includes the Iowa Tourism Office, is charged with promoting Iowa's business climate, quality of life, and its special places/experiences to help drive economic growth through business and community development and visitor spending.

IEDA's efforts have spanned a variety of channels, including: advertising, web content and development, collateral materials, direct marketing (including direct mail, conferences and other special events), database and automated marketing (including e-communication), social media and media relations.

Objectives:

The vendor will be charged with documenting the success toward measurable goals for each of

the following objectives:

1. Support new and existing business growth by increasing awareness of Iowa's benefits as a place to live, work and do business.
2. Champion efforts to attract and retain Iowans through the promotion of housing opportunities for families and communities.
3. Grow the state's economic benefit from travel expenditures by inspiring more visits to and within Iowa.
4. Generate support and advocacy for IEDA's programs by increasing understanding of how they generate beneficial economic activity and improve communities for the state and its citizens.

Target Audiences. Target audiences for IEDA's marketing and communication efforts include the following:

1. Business influencers, including executives in target industries (biosciences, insurance/financial services, advanced manufacturing and information technology as it relates to these industries), either currently based in, or considering relocating to, Iowa; site selection consultants and service providers; and economic development professionals.
2. Job seekers, including those who might relocate to Iowa (e.g., former residents or students in target industries, or veterans who would benefit from the Home Base Iowa program) and graduating students who would consider building their careers in Iowa.
3. Tourists, including current residents of, and those interested in visiting, Iowa as well as business influencers and job seekers investigating potential growth in, or considering a move to, Iowa.
4. Stakeholders in Iowa who have an interest in attracting more visitors and residents from out of state and increasing quality of life for Iowans, including business, tourism and community development groups.
5. Iowans who use and pay for, through their tax dollars, many of the business, tourism and community development programs, marketing efforts and incentives and have a stake in the state of the economy.

Section 2 Administrative Information

2.1 Issuing Officer

The Issuing Officer, identified below, is the sole point of contact regarding the RFP from the date of issuance until selection of the successful vendor.

Staci Hupp Ballard, Chief Strategic Communications Officer

Iowa Economic Development Authority | Iowa Finance Authority
 1963 Bell Avenue, Suite 200
 Des Moines, IA 50315

Telephone: 515-348-6245

Email: staci.ballard@iowaeda.com

2.2 Restriction on Communication

From the issue date of this RFP until announcement of the successful vendor(s), vendors may only contact the Issuing Officer regarding the RFP. Vendors may be disqualified if they contact any state employee regarding this RFP other than the Issuing Officer.

2.3 Downloading the RFP from the Internet

The RFP and all related information will be posted to IEDA's website at iowaeda.com/requests-for-proposals. Vendors are advised to check periodically for any amendments.

2.4 Procurement Timetable

The following dates are set forth for informational and planning purposes; however, IEDA reserves the right to change the dates.

<i>Event</i>	<i>Date</i>
Post RFP on Targeted Small Business website (2 business days)	May 12, 2021
Post RFP on IEDA website and State's Bid Opportunities site	May 14, 2021
Deadline for written questions from vendors	May 21, 2021
Post answers to questions on IEDA website	June 1, 2021
Closing date for receipt of bid proposal submissions	June 15, 2021
Finalists notified	June 30, 2021

Presentations by finalists	Week of July 19, 2021
Advisory Committee recommendation to IEDA Board	August 20, 2021
Successful vendor(s) notified/announced	August 20, 2021
Contract effective date	On or about September 1, 2021

2.5 Questions, Requests for Clarification, and Suggested Changes

Vendors are invited to submit written questions and requests for clarifications regarding the RFP. Vendors may also submit suggested changes regarding the RFP. Questions related to this RFP, requests for clarification, and suggested changes must be submitted in writing to the Issuing Officer by 5 p.m. CST, May 21, 2021, at the Issuing Officer's email address set out above.

Verbal/oral questions, requests for clarification, and suggested changes will not be accepted. If questions, clarifications or suggested changes pertain to a specific section of the RFP, vendors are required to reference the page and section number(s). Written responses to questions, requests for clarification and suggested changes will be posted to the IEDA website, iowaeda.com/requests-for-proposals, by 4 p.m. CST, June 1, 2021. These written responses will be considered part of the RFP. If IEDA decides to adopt a suggestion, IEDA will issue an amendment to the RFP and post to the same.

IT IS THE RESPONSIBILITY OF VENDORS TO CHECK THESE SITES REGULARLY FOR ANSWERS TO QUESTIONS, CLARIFICATIONS AND AMENDMENTS TO THE RFP

2.6 Amendment to the RFP and Bid Proposal and Withdrawal of Bid Proposal

IEDA reserves the right to amend the RFP at any time. The vendors shall acknowledge receipt of an amendment in its proposal. If the amendment occurs after the closing date for receipt of bid information, IEDA may, in its sole discretion, allow vendors to amend their bid proposals in response to IEDA's amendment, if necessary.

Vendors may amend their bid proposals. The amendment must be in writing, signed by the vendor, submitted to the email address to which bids must be addressed, and received by the date and time set for the receipt of proposals. Faxed amendments will not be accepted.

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 Issuing Officer in writing if they wish to withdraw their proposals.

2.7 Submission of Bid Proposals

IEDA must receive the bid proposal by no later than 4 p.m. Central Standard Time **June 15, 2021**, at IEDA. Bid proposals must be submitted electronically to 93b57295.iowa1.onmicrosoft.com@amer.teams.ms. **This is a mandatory requirement and will not be waived by IEDA. Any bid proposal received after this deadline will be rejected.** It is the vendor's responsibility to ensure that the bid proposal is received prior to the deadline. IEDA will not accept bid proposals submitted via means other than electronic.

Vendors must furnish all information necessary to evaluate the bid proposal. Bid proposals that fail to meet the mandatory requirements of the RFP will be disqualified. Verbal information provided by the vendor shall not be considered part of the vendor's proposal.

2.8 Bid Proposals Confidential Until Completion of Review and Award Notice

The bid proposals will remain confidential until the Advisory Committee has reviewed all of the bid proposals submitted in response to this RFP and received by 4 p.m. (CST) on June 15, 2021, and IEDA has issued a notice of intent to award a contract. See Iowa Code Section 72.3.

2.9 Costs of Preparing the Bid Proposal

The costs of preparation and delivery of the bid proposal are solely the responsibility of the vendor.

2.10 Rejection of Bid Proposals

IEDA reserves the right to reject any or all bid proposals, in whole and in part, received in response to this RFP at any time prior to the execution of a written contract(s). Issuance of this RFP in no way constitutes a commitment by IEDA to award a contract(s). This RFP is designed to provide vendors with the information necessary to prepare a competitive bid proposal. This RFP process is for IEDA's benefit and is intended to provide IEDA with competitive information to assist in the selection of vendors to provide services. It is not intended to be comprehensive and each vendor is responsible for determining all factors necessary for submission of a comprehensive bid proposal.

2.11 Disqualification

IEDA shall reject outright and shall not evaluate proposals for any one of the following reasons:

- 2.11.1** The vendor fails to deliver the bid proposal by the due date and time.
- 2.11.2** The vendor states that a portion of a Services Elements on which it is bidding cannot be met.
- 2.11.3** The vendor's response materially changes a Services Element.
- 2.11.4** The vendor's response limits the rights of IEDA.
- 2.11.5** The vendor fails to include information necessary to substantiate that it will be able to meet a Services Element. A response of "will comply" or merely repeating the requirement is not sufficient. Responses must indicate present capability; representations that future developments will satisfy the requirement are not sufficient.
- 2.11.6** The vendor fails to respond to IEDA's request for information, documents, or references.
- 2.11.7** The vendor fails to include any signature, certification, authorization, stipulation, disclosure or guarantee requested in section 4 of this RFP.
- 2.11.8** The vendor presents the information requested by this RFP in a format inconsistent with the instructions of the RFP.
- 2.11.9** The vendor initiates unauthorized contact regarding the RFP with state employees.
- 2.11.10** The vendor provides misleading or inaccurate responses.

2.12 Nonmaterial and Material Variances

IEDA reserves the right to waive or permit cure of nonmaterial variances in the bid proposal if, in the judgment of IEDA, it is in IEDA's best interest to do so. Nonmaterial variances include minor informalities that do not affect responsiveness; that are merely a matter of form or format; that do

not change the relative standing or otherwise prejudice other vendors; that do not change the meaning or scope of the RFP; or that do not reflect a material change in the services. In the event IEDA waives or permits cure of nonmaterial variances, such waiver or cure will not modify the RFP requirements or excuse the vendor from full compliance with RFP specifications or other contract requirements if the vendor is awarded the contract. The determination of materiality is in the sole discretion of IEDA.

2.13 Reference Checks

IEDA reserves the right to contact any reference to assist in the evaluation of the bid proposal, to verify information contained in the bid proposal and to discuss the vendor's qualifications and the qualifications of any subcontractor identified in the bid proposal.

2.14 Information from Other Sources

IEDA reserves the right to obtain and consider information from other sources concerning a vendor, such as the vendor's capability and performance under other contracts.

2.15 Verification of Bid Proposal Contents

The content of a bid proposal submitted by a vendor is subject to verification. Misleading or inaccurate responses shall result in disqualification.

2.16 Criminal History and Background Investigation

IEDA reserves the right to conduct criminal history and other background investigation of the vendor, its officers, directors, shareholders, or partners and managerial and supervisory personnel retained by the vendor for the performance of the contract.

2.17 Bid Proposal Clarification Process

IEDA reserves the right to contact any or all vendors after the submission of bid proposals for the purpose of clarifying a bid proposal to ensure mutual understanding. This contact may include written questions, interviews, site visits, a review of past performance if the vendor has provided goods or services to IEDA or any other political subdivision wherever located, or requests for corrective pages in the vendor's bid proposal. IEDA will not consider information received if the information materially alters the content of the bid proposal or alters the type of goods and services the vendor is offering to IEDA.

An individual authorized to legally bind the vendor shall sign responses to any request for clarification. Responses shall be submitted to IEDA within the time specified in IEDA's request. Failure to comply with requests for additional information may result in rejection of the bid proposal as non-compliant.

2.18 Disposition of Bid Proposals

All proposals become the property of IEDA and shall not be returned to the vendor unless all bid proposals are rejected or the RFP is canceled. In either event, vendors will be asked to send prepaid shipping instruments to IEDA for return of the bid proposals submitted. In the event IEDA does not receive shipping instruments, IEDA 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.

2.19 Public Records and Requests for Confidential Treatment

IEDA may treat all information submitted by a vendor as public information following the

conclusion of the selection process unless the vendor properly requests that information be treated as confidential at the time of submitting the bid proposal. IEDA's release of information is governed by Iowa Code Chapter 22. Vendors are encouraged to familiarize themselves with Chapter 22 before submitting a proposal. IEDA will copy public records as required to comply with the public records laws.

Any request for confidential treatment of information must be included in the transmittal letter with the vendor's bid proposal. In addition, the vendor 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 vendor to respond to any inquiries by IEDA concerning the confidential status of the materials.

Any bid proposal submitted which contains information the vendor believes is confidential under Iowa law must be conspicuously marked 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 vendor.

If the vendor designates any portion of the RFP as confidential, the vendor must submit one copy of the bid proposal from which the confidential information has been excised. This excised copy shall be submitted in addition to the complete, unredacted bid proposal. 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.

IEDA will treat the information marked confidential as confidential information only to the extent such information is determined confidential under Iowa Code Chapter 22 or other applicable law.

In the event IEDA receives a request for information marked confidential, written notice shall be given to the vendor seven (7) calendar days prior to the release of the information to allow the vendor to seek injunctive relief pursuant to Section 22.8 of the Iowa Code.

The vendor's failure to request confidential treatment of material will be deemed by IEDA as a waiver of any right to confidentiality which the vendor may have had.

2.20 Copyrights

By submitting a bid proposal, the vendor agrees IEDA may copy the bid proposal for purposes of facilitating the evaluation of the bid proposal or to respond to requests for public records. The vendor consents to such copying by submitting a bid proposal and warrants that such copying will not violate the rights of any third party. IEDA shall have the right to use ideas or adaptations of ideas that are presented in the bid proposals.

2.21 Release of Claims

By submitting a bid proposal, the vendor agrees that it will not bring any claim or cause of action against IEDA based on any misunderstanding concerning the information provided herein or concerning IEDA's failure, negligent or otherwise, to provide the vendor with pertinent information as intended by this RFP.

2.22 Presentations

The Advisory Committee may ask all responsive vendors to make a presentation or the Committee may elect to narrow the field of vendors that make presentations to those that receive the highest initial ranking. The presentation will occur at IEDA's offices or it may be done

electronically, only if IEDA elects to accept presentations via electronic means. The determination as to need for presentations, the location, order, and schedule of the presentations is at the sole discretion of IEDA. The presentation may include PowerPoint slides, videos, graphics and other media selected by the vendor to illustrate the vendor's bid proposal. The Issuing Officer will notify vendors, in advance, of the time allowed and presentation format to be followed.

2.23 Evaluation of Bid Proposals Submitted

Bid proposals that are timely submitted and are not subject to disqualification will be reviewed in accordance with Section 5 of the RFP. IEDA will not necessarily award any contract(s) resulting from this RFP to the vendor offering the lowest cost to IEDA. Instead, IEDA will award the contract(s) to the compliant, qualified, experienced vendor(s) whose proposal(s) ranks highest in accordance with the evaluation criteria set forth in section 5 of this RFP and subject to approval of the Director/Executive Director of IEDA.

2.24 Award Notice and Acceptance Period

Notice of intent to award the contract will be sent by email to all vendors submitting a timely bid proposal. Negotiation and execution of the contract(s) shall be completed on or about **September 1, 2021**. If the apparent successful vendor(s) fails to negotiate and deliver an executed contract by that date or, if the procurement timetable has been changed by IEDA, by the new date established for contract execution, IEDA may cancel the award and award the contract(s) to the next highest ranked vendor(s).

2.25 Definition of Contract

The full execution of a written contract shall constitute the making of a contract for services and no vendor(s) shall acquire any legal or equitable rights relative to the contract services until the contract(s) has (have) been fully executed by the successful vendor(s) and IEDA.

2.26 Choice of Law and Forum

This RFP and the resulting contract are to be governed by the laws of the state of Iowa. Changes in applicable laws and rules may affect the award process or the resulting contract. Vendors are responsible for ascertaining pertinent legal requirements and restrictions. Any and all litigation or actions commenced in connection with this RFP shall be brought in the appropriate Iowa forum.

2.27 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. Vendors are responsible to determine the applicability of this Chapter to their activities and to comply 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.

2.28 No Minimum Guaranteed

IEDA anticipates that the selected vendor(s) will provide services as requested by IEDA. IEDA will not guarantee any minimum compensation will be paid to the vendor(s) or any minimum usage of the vendor(s)'s services.

Section 3 Services Elements

- 3.1 Services Elements.** IEDA is seeking the following Services Elements in support of its marketing and communications efforts, outlined in Section 1.2. This list of Service Elements is designed to include the most significant categories of work covered within this RFP but is not exhaustive. Similarly, the bullets within each category provide examples of how IEDA defines the work. Vendors must bid on at least some of the Services Elements, if not all, but are encouraged to identify complementary services or different examples or recommendations for how similar work might be done within the Services Elements. Vendors shall identify in their response both those Services Elements that are included in the bid proposal and which are not.

IEDA will consider proposals with partnerships among providers. Vendors bidding together should detail their proposed partnership, the combined Services Elements on which each partner is bidding and how collaboration will be achieved.

In preparing their proposals, all Vendors should outline their group's capabilities in the Services Elements on which they are bidding. That may include:

- An overall philosophy or preferred approach to thinking about the Services Elements;
- Any preferred processes or tools for accomplishing work described in the Services Elements;
- Examples that demonstrate capabilities within the Services Elements; and
- Any specific or unique expertise in related work, clients or industries.

A full creative proposal is not expected or required.

3.1.1 Planning & Strategy

- Conduct, or support conducting, primary market research as needed to identify and characterize the most appropriate target audiences, strategies and tactics to achieve IEDA's marketing and communications objectives.
- In partnership with the Chief Strategic Communications Officer or her designee(s), develop a comprehensive annual marketing and communications Strategic Plan to meet stated goals and objectives and including recommendations for key performance indicators (KPIs).
- Follow and recommend application of industry trends or insights to support mid-term adjustments to the strategic plan or take advantage of unique opportunities.
- Serve as a project manager for all initiatives within purview, including detailed and regular status and KPI reporting.
- Work with existing and help identify new partners with needed marketing and communications strengths.

3.1.2 Content Development, Marketing and Measurement

- Recommend and manage an integrated approach to content marketing to ensure synergies between each aspect of the Strategic Plan: digital, social and media relations.
- Develop compelling content – across industries, business and tourism/lifestyle topics and trends – for the right audience and the right channel to make a difference against stated objectives.
- Work with the Chief Strategic Communications Officer or designee(s) to measure and report on content performance against KPIs, recommending adjustments as needed to increase search engine optimization (SEO), expand reach and attract the right audiences.

3.1.3 Media and Influencer Relations

- Identify, monitor and build relationships with media – traditional and new – essential to reaching target audiences.
- Prepare and pitch proactive, positive stories that help meet marketing and communication objectives.
- Recommend and successfully broker contractual relationships with influencers whose third-party endorsement, authored/created content or reviews enhance the value and visibility of IEDA's messages.

3.1.4 Advertising Services

- Recommend and implement a media mix, including print, broadcast, radio, digital and social channels, that supports the Strategic Plan.
- Collect and analyze metrics (e.g., CTR, CPM, bounce rate, time on site, etc.) against KPIs and recommend mid-term adjustments to optimize overall advertising performance.
- Follow and recommend any adjustments to advertising based on trends, emerging products and/or unique opportunities.
- Working with the Chief Strategic Communications Officer or her designee(s), plan, propose, implement and measure a cooperative marketing program involving multiple tourism and economic development stakeholders.
- Manage administrative aspects of media buy from negotiation to measurement, including the budget, timing, submitting artwork, meeting deadlines and reporting progress or adjustments in a timely fashion.

3.1.5 Creative Services

- Determine the best approach for different channels and audiences to deliver on KPIs.
- Develop creative concepts and executions for a variety of mediums, including graphic design for print, web and social, video production for web, social and broadcast and ad copy writing.
- Design and implement compelling, creative experiences, such as unique direct mail approaches/pieces; 360, VR, AR or time lapse video; memorable events or displays at conferences or meetings.
- Follow and implement trends, new tools and new technologies in creative services and design recommendations and applications.

3.1.6 Website Development and Digital Marketing

- Work with Chief Strategic Communications Officer or designee(s) to further develop and maintain IEDA digital presence that delivers on brand and supports the Strategic Plan.
- Review and recommend upgrades to digital assets managed by current vendors, including IEDA websites, based on knowledge of latest trends and tools for reaching a variety of target audiences in a compelling way – keeping in mind, the need for lead generation, mobile responsiveness, SEO and content strategy.
- Manage and maintain back-end database that feeds tourism listings and direct marketing efforts as well as provide analytics that help better target audiences and generate business development leads.
- Identify opportunities to improve website functionality and digital tools, such as interactive maps and comparisons, route-builders, location services, and other features to improve user experience.

3.1.7 Social Media

- Develop overarching social media governance recommendations, including voice and cadence and support IEDA in implementing (e.g., social media monitoring, training/access to any new tools, etc.).
- Provide recommendations for leveraging social media in support of the Strategic Plan, including social media-driven contests and campaigns.
- Follow evolving profile of current and new social media channels and best practices for engaging; provide recommendations to IEDA regarding any adjustments to deliver on social media-related KPIs.
- Provide support developing both written and visual messages for social media as needed.

Section 4 Format and Content of Bid Proposals

4.1 Instructions. These instructions prescribe the format and content of the bid proposal. They are designed to facilitate a uniform review process. Failure to adhere to the proposal format may result in the disqualification of the bid proposal.

4.1.1 The bid proposal shall include a Technical Proposal and a Cost Proposal.

4.1.2 One bid proposal shall be timely submitted to the Issuing Officer at the following email address: 93b57295.iowa1.onmicrosoft.com@amer.teams.ms

4.1.3 If the vendor designates any information in its proposal as confidential pursuant to section 2.22, the vendor must also submit one electronic copy from which confidential information has been excised. 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.

4.2 Technical Proposal. The following documents and responses shall be included in the bid proposal in the order given below:

4.2.1 Transmittal Letter

An individual authorized to legally bind the vendor(s) shall sign the transmittal letter. The letter shall include the vendor's mailing address, electronic mail address and telephone number.

Any request for confidential treatment of information shall be included in the transmittal letter in addition to the specific statutory basis supporting the request and an explanation why disclosure of the information is not in the best interest of the public. The transmittal letter shall also contain the name, address and telephone number of the individual authorized to respond to IEDA about the confidential nature of the information.

4.2.2 Table of Contents

The vendor(s) shall include a table of contents for its/their bid proposal.

4.2.3 Executive Summary

The vendor(s) shall prepare an executive summary that includes:

- Statements that demonstrate the vendor(s) understand(s) and agree(s) with the terms and conditions of the RFP and the proposed contract.
- An overview of the vendor's plans for meeting IEDA's needs as defined in the RFP.
- A description of the vendor's plan for working with its co-submitters, if applicable, or if not co-submitting, the vendor's previous experience working with other service providers and clients on collaborative teams.

4.2.4 Services Elements

- The vendor(s) shall indicate both the Services Elements described in Section 3 of this RFP that are included in the bid proposal, and those that are not. Co-submissions should identify which vendor will provide which Services Elements and outline an approach to coordination.

- The vendor(s) shall demonstrate how each of the Services Elements described in Section 3 of this RFP and included in the bid proposal will be met. This includes any philosophy about the Services Elements overall, any proprietary processes and/or specific/unique expertise.
- Proposals must be fully responsive to the Section 3 Services Elements on which vendor(s) wish to bid. Merely repeating the requirements will be considered non-responsive and may disqualify the vendor(s).

4.2.5 Company Information

The vendor shall provide the following background information:

- Name, address, telephone number and e-mail address of the vendor.
- Identify and specify the location(s) of the major offices and other facilities that relate to the vendor's performance under the terms of this RFP.
- Name, address and telephone number of the vendor's representative to contact regarding all matters concerning this proposal.
- Name and contact information for any co-submitting vendors or subcontractors who will be involved with this project.
- The successful vendor will be required to be registered to do business in Iowa. If already registered, provide the date of the vendor's registration to do business in Iowa and the name of the vendor's registered agent.

4.2.6 Company Experience

The vendor(s) must provide the following information regarding its experience:

- Number of years in business.
- Number of years of experience providing the types of services sought by the RFP and within related industries.
- At least one (1), but no more than three (3), total case studies demonstrating results of vendor(s) prior work providing services similar to those sought by this RFP.
- Three (3) previous or current client references IEDA could contact for information regarding vendor's performance in providing services similar to those described in this RFP. Client, name, title, organization, accurate contact information and a brief description of the work are required.

4.2.7 Personnel

The vendor(s) must provide bios for all key personnel who would be involved in providing the services outlined in this RFP. The following information must be included:

- Full name.
- Education.
- Years of experience and employment history, particularly as it relates to the services specified herein.
- Account team role if vendor(s) is/are selected.

4.2.8 Terminations, Litigation, Debarment

The vendor(s) must provide the following information:

- During the last five (5) years, has the vendor had a contract for terminated for any reason? If so, provide full details related to the termination.

- During the last five (5) years, describe any damages or penalties of anything of value traded or given up by the vendor under any existing or past contracts as it relates to services performed that are similar to the services contemplated by this RFP and the resulting Contract. If so, indicate the reason for the penalty or exchange of property or services and the estimated account of the cost of that incident to the vendor.
- 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 vendor to engage in any business, practice or activity.
- 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 vendor to perform the required services. The vendor 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 vendor(s) after the execution of a contract(s), must be disclosed in a timely manner in a written statement to IEDA.
- During the last five (5) years, have any irregularities been discovered in any of the accounts maintained by the on behalf of others? If so, describe the circumstances of irregularities or variances and disposition of resolving the irregularities or variances.

4.2.9 Proposal Certification

The vendor(s) shall sign and submit with the bid proposal the document included as Attachment # 1 in which the vendor(s) shall certify that the contents of the bid proposal are true and accurate.

4.2.10 Acceptance of Terms and Conditions

The vendor(s) shall specifically agree that the bid proposal is predicated upon the acceptance of all terms and conditions stated in the RFP. If the vendor(s) object(s) to any term or condition, the vendor(s) must specifically refer to the RFP page, and section. Objections or responses that materially alter the RFP may be deemed non-responsive and disqualify the vendor(s).

4.2.11 Certification of Independence and No Conflict of Interest

The vendor(s) shall sign and submit with the bid proposal the document included as Attachment # 2 in which the vendor(s) shall certify that it/they developed the bid proposal independently. The vendor(s) shall also certify that no relationship exists or will exist during the contract period between the vendor(s) and IEDA that interferes with fair competition or is a conflict of interest. IEDA reserves the right to reject a bid proposal or cancel the award if, in its sole discretion, any relationship exists that could interfere with fair competition or conflict with the interests of IEDA.

4.2.12 Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion

The vendor(s) shall sign and submit with the bid proposal the document included as Attachment # 3 in which the vendor(s) shall certify that it/they is/are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any federal department or agency.

4.2.13 Authorization to Release Information

The vendor(s) shall sign and submit with the bid proposal the document included as Attachment # 4 in which the vendor(s) authorize(s) the release of information to IEDA.

4.2.14 Firm Bid Proposal Terms

The vendor(s) shall guarantee in writing the availability of the services offered and that all bid proposal terms, including price, will remain firm a minimum of 90 days following the deadline for submitting proposals.

4.2.15 Certification Regarding Sales and Use Tax

The vendor(s) shall sign and submit with the bid proposal the document included as Attachment # 5 (Tax Certification Letter) regarding collection of sales and use tax.

4.3 Cost Proposal

4.3.1 The vendor (s) shall provide its Cost Proposal for the services. Vendor(s) is/are not required to provide the Cost Proposal in any specific format.

4.3.2 The amounts reflected should exclude state and federal taxes except for taxes required to be withheld for employment purposes. IEDA is a tax-exempt entity.

Section 5 Evaluation of Bid Proposals

- 5.1 Introduction.** The evaluation process is designed to award the contract(s) not necessarily to the vendor(s) of least cost, but rather to the vendor(s) with the best combination of attributes to perform the required services. IEDA may award one contract for all Services Elements described in Section 3 or may choose to award multiple contracts for one or more Services Elements, whichever IEDA determines is in the best interests of IEDA.

The evaluation and award process shall consist of the following steps:

- Review of the bid proposals to assess compliance with mandatory requirements.
- Detailed evaluation of capabilities for Services Elements included within bid proposal.
- Presentations (optional, solely at IEDA's discretion)
- Ranking of bid proposals.
- Advisory Committee recommendation to the IEDA Board.
- Award decision by the IEDA Board.

- 5.2 Advisory Committee.** IEDA intends to conduct a comprehensive, fair and impartial evaluation of bid proposals received in response to this RFP. IEDA will use an Advisory Committee to review and evaluate the proposals. This Committee reserves the right to use additional, ad hoc individuals with expertise in the subject matter of this RFP to assist the Committee in making its selection.

- 5.3 Evaluation Criteria.** The Advisory Committee will evaluate all proposals and make an award using the following criteria, which are listed in no particular order.

Technical Proposal:

5.3.1 Compliance with RFP Content and Format Requirements

Each RFP will first be screened to determine if it conforms to the content and format requirements described in this RFP. Those that meet the content and format requirements will be move forward in the review process.

5.3.2 Company Experience and Qualifications

Vendors will be evaluated on their experience and applicable qualifications necessary to perform the required services. Proven successful experience in providing similar services will be favored. Other factors include, but are not limited to:

- Information from references;
- Quality and applicability of case studies;
- Ability and willingness to collaborate with other vendor(s); and
- Financial stability.

5.3.3 RFP Section 3 Services Elements

Bids will be evaluated based on the vendor's/vendors' ability to meet the Services Elements outlined in Section 3. Other factors include, but are not limited to:

- Vendor(s) philosophy about Services Elements;
- Preferred process or tools recommended by vendor(s); and
- Unique or specific expertise related to Services Elements or related industries.

Cost Proposal:

5.3.4 Cost Proposal

Proposals will be evaluated in relation to the other cost proposals received. The winning proposal may not be the proposal with the lowest cost.

5.4 Recommendation of the Evaluation Committee; Decision by IEDA Board.

5.4.1 The recommendation of the Advisory Committee shall be presented to the IEDA Board for consideration. This recommendation may include, but is not limited to, the name of one or more vendors recommended for selection and the maximum amount to be paid to each vendor, or a recommendation that no vendor(s) be selected.

5.4.2 The IEDA Board's decision is final.

Section 6 Contract Terms and Conditions

6.1 Contract Terms and Conditions.

- 6.1.1** The contract(s) that IEDA expects to award as a result of this RFP will be based upon the bid proposal submitted by the successful vendor(s) and this solicitation. The contract(s) between IEDA and the successful vendor(s) shall be a combination of the specifications, terms and conditions of the RFP, the offer of the vendor(s) contained in the technical and cost proposals, written clarifications or changes made in accordance with the provisions herein, and any other terms deemed necessary by IEDA.
- 6.1.2** IEDA reserves the right to either award a contract without further negotiation with the successful vendor(s) or to negotiate contract terms with the selected vendor(s) if the best interests of IEDA would be served.
- 6.1.3** The successful vendor(s) must, in a timely manner, enter into a contract with IEDA to implement the Services Elements contemplated by this RFP. The contract(s) will include, but not be limited to, terms and conditions that clarify the respective roles and responsibilities of the vendor(s) and IEDA. Representative subjects that will be included in a final contract include, but are not limited to: payment limitations; work authorization procedures; default and termination terms; indemnification requirements; identification of key personnel; intellectual property rights; nonappropriation, deappropriation, or reduction in funding; clarification that Iowa law will govern this contract; and a requirement that the vendor(s) provide IEDA, by the 10th of each month, an activity report.

- 6.2 Contract Length.** IEDA intends to award a ten (10) month contract, or contracts (if multiple vendors are selected). The contract period is September 1, 2021 - June 30, 2022, with options to renew for one (1) year on July 1, 2022 and for one additional year on July 1, 2023. The options to renew are at IEDA's sole discretion. Any contract(s) resulting from the RFP shall not be an exclusive contract(s).

List of Attachments

Attachment #1 – Proposal Certification

Attachment #2 – Certification of Independence and No Conflict of Interest

Attachment #3 – Certification Regarding Debarment, Suspension, and Eligibility, and Voluntary Exclusion

Attachment #4 – Authorization to Release Information

Attachment #5 – Certification Regarding Registration, Collection and Remittance of State Sales & Use Tax

Attachment #1

PROPOSAL CERTIFICATION

(Date)

Staci Hupp Ballard, Issuing Officer
Chief Strategic Communications Officer
Iowa Economic Development Authority | Iowa Finance Authority
1963 Bell Avenue, Suite 200
Des Moines, Iowa 50315

Re: IEDA's 2021 Request for Proposal for Marketing and Communication Services
PROPOSAL CERTIFICATION

Ms. Hupp Ballard:

I certify that the contents of the proposal submitted on behalf of (Name of Vendor(s)) in response to the above-referenced RFP are true and accurate. I also certify that (Name of Vendor(s)) has/have not made any knowingly false statements in its proposal.

Sincerely,

Name and Title

Attachment # 2

CERTIFICATION OF INDEPENDENCE AND NO CONFLICT OF INTEREST

(Date)

Staci Hupp Ballard, Issuing Officer
Chief Strategic Communications Officer
Iowa Economic Development Authority/Iowa Finance Authority
1963 Bell Avenue, Suite 200
Des Moines, Iowa 50315

Re: IEDA's 2021 Request for Proposal for Marketing and Communication Services
CERTIFICATION OF INDEPENDENCE AND NO CONFLICT OF INTEREST

Ms. Hupp Ballard:

By submitting a proposal in response to the above-referenced RFP, the undersigned certifies the following:

1. The proposal has been developed independently, without consultation, communication or agreement with any employee or consultant to IEDA who has worked on the development of this RFP, or with any person serving as a member of the evaluation committee.
2. The proposal has been developed independently, without consultation, communication or agreement with any other vendor or parties for the purpose of restricting competition.
3. Unless otherwise required by law, the information found in the proposal has not been knowingly disclosed and will not be knowingly disclosed prior to the award of the contract, directly or indirectly, to any other vendor.
4. No attempt has been made or will be made by (Name of Vendor(s)) to induce any other vendor to submit or not to submit a proposal for the purpose restricting competition.
5. No relationship exists or will exist during the contract period between (Name of Vendor(s)) and IEDA that interferes with fair competition or as a conflict of interest.

Sincerely,

Name and Title

Attachment # 3

CERTIFICATION REGARDING DEBARMENT, SUSPENSION, AND ELIGIBILITY, AND VOLUNTARY EXCLUSION

(Date)

Staci Hupp Ballard, Issuing Officer
Chief Strategic Communications Officer
Iowa Economic Development Authority|Iowa Finance Authority
1963 Bell Avenue, Suite 200
Des Moines, Iowa 50315

Re: IEDA's 2021 Request for Proposal for Marketing and Communication Services
**CERTIFICATION REGARDING DEBARMENT, SUSPENSION, AND
ELIGIBILITY, AND VOLUNTARY EXCLUSION**

Ms. Hupp Ballard:

By submitting a proposal in response to the above-referenced RFP, the undersigned certifies the following:

1. I certify that, to the best of my knowledge, (Name of Vendor(s)) and all of its/their principals: (a) are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by a Federal Agency or agency; (b) have not within a three year period preceding this proposal been convicted of, or had a civil judgment rendered against them for commission of fraud, or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (federal, state, or local) transaction or contract under a public transaction, violation of antitrust statutes or commission of embezzlement, theft, forgery, falsification or destruction of records, making false statements, or receiving stolen property; (c) are not presently indicted for or other criminally or civilly charged by a government entity (federal, state, or local) with the commission of any of the offenses enumerated in (b) of this certification; and (d) have not within a three year period preceding this proposal had one or more public transactions (federal, state, or local) terminated for cause.
2. This certification is a material representation of fact upon which IEDA has relied upon when this transaction was entered into. If it is later determined that the undersigned knowingly rendered an erroneous certification, in addition to other remedies available, IEDA may pursue available remedies including suspension, debarment, or termination of the contract.

Sincerely,

Name and Title

Attachment # 4

AUTHORIZATION TO RELEASE INFORMATION

(Date)

Staci Hupp Ballard, Issuing Officer
Chief Strategic Communications Officer
Iowa Economic Development Authority|Iowa Finance Authority
1963 Bell Avenue, Suite 200
Des Moines, Iowa 50315

Re: IEDA's 2021 Request for Proposal for Marketing and Communication Services
AUTHORIZATION TO RELEASE INFORMATION

Ms. Hupp Ballard:

(Name of Vendor(s)) hereby authorizes the Iowa Economic Development Authority ("Agency") 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 vendor in response to the above-referenced RFP.

The vendor acknowledges that it may not agree with the information and opinions given by such person or entity in response to a reference request. The vendor acknowledges that the information and opinions given by such person or entity may hurt its chances to receive contract awards from IEDA or may otherwise hurt its reputation or operations. The vendor is willing to take that risk.

The vendor hereby releases, acquits and forever discharges the State of Iowa, IEDA, 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 IEDA in the evaluation and selection of a successful vendor in response to the above-referenced RFP.

The vendor authorizes representatives of IEDA 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 the above-referenced RFP.

The vendor further authorizes any and all persons, 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 IEDA in the evaluation and selection of a successful vendor in response to the above-referenced RFP.

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

IOWA ECONOMIC DEVELOPMENT AUTHORITY

Sincerely,

Printed Name of Vendor Organization

Name and Title of Authorized Representative

Date

Attachment # 5

CERTIFICATION REGARDING REGISTRATION, COLLECTION AND REMISSION OF STATE SALES AND USE TAX

(Date)

Staci Hupp Ballard, Issuing Officer
Chief Strategic Communications Officer
Iowa Economic Development Authority | Iowa Finance Authority
1963 Bell Avenue, Suite 200
Des Moines, Iowa 50315

Re: IEDA's 2021 Request for Proposal for Marketing and Communication Services
**CERTIFICATION REGARDING REGISTRATION, COLLECTION
AND REMISSION OF STATE SALES AND USE TAX**

Ms. Hupp Ballard:

Pursuant to Iowa Code sections 423.2(10) & 423.5(8) (2005 Code Sup.) - a retailer in Iowa or a retailer maintaining a business in Iowa that enters into a contract with a state agency must register, collect, remit Iowa sales tax and Iowa use tax levied under Iowa Code chapter 423 on all sales of tangible personal property and enumerated services. The Act also requires vendors to certify their compliance with sales tax registration, collection, and remission requirements and provides potential consequences if the certification is false or fraudulent.

By submitting a proposal in response to the above-referenced RFP, the undersigned certifies the following: (check the applicable box).

☐ (Name of Vendor(s)) is/are registered with the Iowa Department of Revenue, collects, and remits Iowa sales and use taxes as required by Iowa Code chapter 432; or

☐ (Name of Vendor(s)) is/are not a "retailer" or a "retailer maintaining a place of business in this state" as those terms are defined in Iowa Code subsections 423.1(42) & (43).

(Name of Vendor(s)) also acknowledges/acknowledge that the Iowa Economic Development Authority (IEDA) may declare the (Name of Vendor(s))'s bid or resulting contract void if the above certification is false. The (Name of Vendor(s)) also understands/understand that fraudulent certification may result in the IEDA or its representative filing for damages for breach of contract.

Sincerely,

Name and Title