



**REQUEST FOR PROPOSALS
TO DEVELOP, IMPLEMENT AND
EVALUATE A
METRO RECYCLING INFORMATION
PROMOTIONAL CAMPAIGN**

RFP # 10-1580

December 2009

Prepared by:

METRO

Resource Conservation and Recycling

Sustainability Center

600 NE Grand Ave.

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www.oregonmetro.gov



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Request for Proposals

FOR

A Metro Recycling Information Promotional Campaign to Increase Hotline Calls

I. INTRODUCTION

The Resource Conservation and Recycling division of Metro, a metropolitan service district organized under the laws of the state of Oregon and the Metro Charter, at 600 NE Grand Ave., Portland, OR 97232-2736, is requesting proposals to develop, implement and evaluate a Metro Recycling Information promotional campaign. Proposals are due no later than 4 p.m. Monday, Jan. 11, 2010, at the Metro e-mail address provided in section VI, below. Details on the project and proposal are contained in this document.

II. PROJECT SUMMARY

This project, which begins in January 2010 and ends July 31, 2010, comprises developing, implementing and evaluating a promotional campaign aimed to increase calls to the Metro Recycling Information hotline, "503-234-3000," among new Portland metropolitan area residents and suburban residents of Washington, Clackamas and East Multnomah counties. The estimated project budget is \$80,000, with an additional \$10,000 for new media.

Though the successful proposer may develop additional or alternate strategies to achieve the above campaign goals, Metro staff have drafted the following initial set of strategies:

- Expand awareness of hotline as a one-stop informational resource on recycling, disposal, waste prevention and toxics reduction.
- Prompt audiences to call the hotline for hard-to-recycle items.
- Cast the hotline as a service that solves problems.

III. BACKGROUND/HISTORY OF PROJECT

Metro Recycling Information (MRI), a telephone hotline, has assisted residents and businesses across Multnomah, Washington and Clackamas counties since 1981. The program serves as a clearinghouse, providing information, referrals and educational materials on recycling, disposal options, waste prevention and toxics reduction in the Portland metropolitan area. Revered for offering live phone assistance in an era of automated voice systems, the hotline is available from 8:30 a.m. to 5 p.m. Monday through Saturday. MRI also is online at www.oregonmetro.gov/recycling, where web visitors can select links or send e-mail for timely tips and resources on recycling, gardening organically, reducing junk mail and adopting other practices for more sustainable living.

Metro seeks to update its approach to marketing the hotline. For about the last decade, MRI promotional campaigns have largely relied on radio buys, using humorous spots that set the phone number to music or – more recently – topical spots centered on the consumer question “Can I recycle that?” Call volume increased year to year during the program’s first decade but has since flattened to an annual average of 95,000 to 100,000 calls, with about 90 percent from residents. With the challenges of a modest marketing budget, increasingly fragmented media and ever-evolving communication preferences among audiences, the program seeks a fresh, creative, responsive approach that incorporates broadcast, web, social media, print, cable, other current communication tools or a combination thereof.

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IV. PROPOSED SCOPE OF WORK/SCHEDULE

Metro is seeking proposals from qualified firms to provide the following services and products:

- Participate in an initial project meeting, periodic check-in sessions and a final debriefing with Metro staff.
- By early February 2010, develop and provide a written promotional plan that reflects the direction provided in sections II and III, above, and details elements including but not limited to the campaign goals; audiences; strategies; key messages, slogans, themes and images; tactics; budget; timeline; and evaluation methodology.
- In consultation with Metro staff, implement the campaign plan from February 2010 through June 2010.
- In January 2010 and throughout the project duration, advise on additional promotional tactics Metro can execute independent of contractor.
- From February 2010 through June 2010, prepare and submit biweekly written progress reports and, in July 2010, prepare and submit a final written report identifying and evaluating campaign activities, successes and lessons and recommending future strategies and tactics to promote the hotline. Submit all reports to Metro project manager.
- In consultation with Metro staff and as applicable to the campaign plan, recommend, negotiate, purchase and place media buys, including ordering the advertising; forwarding traffic instructions to stations; and defining any required spot rotations, tag copy and cutoff times.
- In consultation with Metro staff, investigate, develop and implement value-added airtime, web and print opportunities – as applicable to the campaign plan and available through the respective media outlets selected for Metro Recycling Information advertising.
- Prepare and provide invoices and cost recaps on all print and electronic media buys, if any.
- Secure make-good spots or credits, as applicable.
- Verify all media-buy invoices, reconciling them with traffic instructions and checking for fair spot rotations among all purchased time periods.
- Direct monthly media invoices, as applicable, to Metro, after verifying accuracy and advising on any payment adjustments.
- In consultation with Metro staff and as applicable to the campaign plan, seek, identify and coordinate community or corporate partnerships and value-added opportunities.

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V. QUALIFICATIONS/EXPERIENCE

Proposers shall have the following experience:

- Developing, implementing and evaluating strategic marketing campaigns – promoting products and services to selected audiences – on a modest budget.
- Negotiating, purchasing and placing radio, television, web and print buys to advertise products and services.
- Developing, preparing, placing and advising clients on social-media content – appropriate and adaptable for Facebook, Twitter, blogs and similar applications – to promote products and services.
- Advising clients on optimal placement and scheduling of advertisement and other promotional content in accordance with a project’s goals, audience, strategies, timeline and budget.
- Coordinating with multiple parties to meet deadlines.
- Seeking, identifying and coordinating community or corporate partnerships and value-added opportunities to stretch the client’s investment.

VI. PROPOSAL INSTRUCTIONS

A. Submission of Proposals

Metro will accept only electronically submitted proposals in Microsoft Word format. Please send the proposal in one e-mail to shareefah.abdullah@oregonmetro.gov. Please consider your proposal submitted to Metro only after receiving a confirmation e-mail from Shareefah Abdullah.

B. Deadline

Proposals will not be considered if received after 4 p.m. Monday, Jan. 11, 2010.

C. RFP as Basis for Proposals:

This request for proposals represents the most definitive statement Metro will make concerning the information upon which proposals are to be based. Any verbal information not addressed in this RFP will not be considered by Metro in evaluating the proposal. All questions relating to this RFP should be addressed to Shareefah Abdullah at 503-797-1599 or shareefah.abdullah@oregonmetro.gov. Any questions that, in the opinion of Metro, warrant a written reply or RFP amendment will be furnished to all parties receiving this RFP. Metro will not respond to questions received after Jan. 4, 2010.

D. Information Release

All proposers are hereby advised that Metro may solicit and secure background information based upon the information, including references, provided in response to this RFP. By submission of a proposal all proposers agree to such activity and release Metro from all claims arising from such activity. In accordance with Oregon Public Records Law (ORS 192), proposals submitted will be considered part of the public record, except to the extent they are exempted from disclosure.

E. Minority, Women and Emerging Small Business Program

In the event that any subcontracts are to be utilized in the performance of this agreement, the proposer's attention is directed to Metro Code provisions 2.04.100, which encourages the use of minority, women and emerging small businesses (MWESB) to the maximum extent practical. Copies of these MWESB requirements are available from the Metro Procurement Office, 600 NE Grand Ave., Portland, OR 97232, 503-797-1816.

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VII. PROPOSAL CONTENTS

The proposal must contain no more than 10 pages of written material – excluding biographies and brochures, which may be included in an appendix – describing the consultant’s ability to perform the work requested, as outlined below. The proposal must be submitted by e-mail.

- A. Transmittal Letter: Indicate who will be assigned to the project, who will be project manager, and that the proposal will be valid for 90 days.
- B. Approach/Project Work Plan: Describe how the work will be done within the given timeframe and budget, as outlined in sections II and IV of this RFP. Include a proposed work plan and schedule.
- C. Staffing/Project Manager Designation: Identify specific personnel assigned to major project tasks, their roles in relation to the work required, percent of their time on the project, and special qualifications they may bring to the project. Include résumés of individuals proposed for this contract.

Metro intends to award this contract to a single firm to provide the services required. Proposals must identify a single person as project manager to work with Metro. The consultant must assure responsibility for any subconsultant work and shall be responsible for the day-to-day direction and internal management of the consultant effort.

- D. Experience: Indicate how your firm meets the experience requirements listed in Section V of this RFP. List projects conducted over the past five years that involved services similar to the services required here. For each of these other projects, include the customer contact person’s name, title, role on the project and telephone number. Identify persons on the proposed project team who worked on each of the other projects listed, and list their respective roles.
- E. Cost/Budget: Present the proposed cost of the project and method of compensation, including but not limited to hourly rates for personnel assigned to the project and commission-based compensation, as applicable; total personnel expenditures; subcontractor fees, if applicable; and any requested expenses.
- F. Diversity in Employment and Contracting:
 - Workforce Diversity – Show measurable steps taken to promote MWESB participation on past projects (i.e., percentage of projects awarded to MWESBs, workforce utilization, or contracts awarded within the last 12 months).
 - MWESB Certification – Include whether your firm is certified as an MBE, WBE or ESB by the State of Oregon and/or whether subconsultants your firm would use are certified as such.

VIII. GENERAL PROPOSAL/CONTRACT CONDITIONS

- A. Limitation and Award: This RFP does not commit Metro to the award of a contract nor to pay any costs incurred in the preparation and submission of proposals in anticipation of a contract. Metro reserves the right to waive minor irregularities, accept or reject any or all proposals received as the result of this request, negotiate with all qualified sources or cancel all or part of this RFP.
- B. Billing Procedures: Proposers are informed that the billing procedures of the selected firm are subject to the review and prior approval of Metro before reimbursement of services can occur. Contractor's invoices shall include an itemized statement of the work done during the billing period

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and will not be submitted more frequently than once a month. Metro shall pay contractor within 30 days of receipt of an approved invoice.

- C. Validity Period and Authority: The proposal shall be considered valid for a period of at least 90 days and shall contain a statement to that effect. The proposal shall contain the name, title, address and telephone number of an individual or individuals with authority to bind any company contacted during the period in which Metro is evaluating the proposal.
- D. Conflict of Interest: A proposer filing a proposal thereby certifies that no officer, agent or employee of Metro or Metro has a pecuniary interest in this proposal or has participated in contract negotiations on behalf of Metro; that the proposal is made in good faith without fraud, collusion, or connection of any kind with any other proposer for the same call for proposals; the proposer is competing solely in its own behalf without connection with, or obligation to, any undisclosed person or firm.
- E. Equal Employment and Nondiscrimination Clause: Metro and its contractors will not discriminate against any person(s), employee or applicant for employment based on race, color, religion, sex, national origin, age, marital status, familial status, gender identity, sexual orientation, disability for which a reasonable accommodation can be made, or any other status protected by law. Metro fully complies with Title VI of the Civil Rights Act of 1964 and related statutes and regulations in all programs and activities. For more information, or to obtain a Title VI Complaint Form, visit www.oregonmetro.gov.

IX. EVALUATION OF PROPOSALS

- A. Evaluation Procedure: Proposals received that conform to the proposal instructions will be evaluated. The evaluation will take place using the evaluation criteria identified in the following section. Interviews may be requested prior to final selection of one firm.
- B. Evaluation Criteria: This section provides a description of the criteria that will be used in the evaluation of the proposals submitted to accomplish the work defined in the RFP. Evaluation categories and maximum available points per section – toward a total possible score of 100 – are as follows:
- Project work plan/approach – 35 points.
 - Project staffing/experience – 25 points.
 - Budget/cost proposal – 25 points.
 - MWESB certification (provide certification number) – 10 points.
 - Workforce diversity – 5 points.

X. APPEAL OF CONTRACT AWARD

Aggrieved proposers who wish to appeal the award of this contract must do so in writing within seven (7) days of issuance of the notice of intent to award by Metro. Appeals must be submitted to Darin Matthews, Procurement Officer, 600 NE Grand Avenue, Portland, Oregon 97232 and must state the specific deviation of rule or statute in the contract award. Metro will issue a written response to the appeal in a timely manner.

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XI NOTICE TO ALL PROPOSERS – STANDARD AGREEMENT

The attached Personal Services Agreement is a standard agreement approved for use by the Office of Metro Attorney. This is the contract the successful proposer will enter into with Metro; it is included for your review prior to submitting a proposal.

Attachment A – Personal Services Agreement

For Personal Service Agreements \$50,000 and Up

Contract # _____

THIS AGREEMENT is between Metro, a metropolitan service district organized under the laws of the State of Oregon and the Metro Charter, located at 600 N.E. Grand Avenue, Portland, OR 97232-2736, and _____, referred to herein as "Contractor," located at _____.

In exchange for the promises and other consideration set forth below, the parties agree as follows:

1. **Duration.** This personal services agreement shall be effective _____ and shall remain in effect until and including _____, unless terminated or extended as provided in this Agreement.

2. **Scope of Work.** Contractor shall provide all services and materials specified in the attached "Exhibit A -- Scope of Work," which is incorporated into this Agreement by reference. All services and materials shall be provided by Contractor in accordance with the Scope of Work, in a competent and professional manner. To the extent that the Scope of Work contains additional contract provisions or waives any provision in the body of this Agreement, the Scope of Work shall control.

3. **Payment.** Metro shall pay Contractor for services performed and materials delivered in the amount(s), manner and at the time(s) specified in the Scope of Work for a maximum sum not to exceed _____ AND _____/100THS DOLLARS (\$ _____).

4. **Insurance.**

a. Contractor shall purchase and maintain at the Contractor's expense, the following types of insurance, covering the Contractor, its employees, and agents:

(1) Broad form comprehensive general liability insurance covering bodily injury and property damage, with automatic coverage for premises, operations, and product liability, shall be a minimum of \$1,000,000 per occurrence. The policy must be endorsed with contractual liability coverage; and

(2) automobile bodily injury and property damage liability insurance coverage shall be a minimum of 1,000,000 per occurrence.

b. Metro, its elected officials, departments, employees, and agents shall be named as ADDITIONAL INSURED. Notice of any material change or policy cancellation shall be provided to Metro 30 days prior to the change or cancellation.

c. Contractor, its subcontractors, if any, and all employers working under this Agreement that are subject employers under the Oregon Workers' Compensation Law shall comply with ORS 656.017, which requires them to provide Workers' Compensation coverage for all their subject workers. Contractor shall provide Metro with certification of Workers' Compensation insurance including employer's liability. If Contractor has no employees and will perform the work without the assistance of others, a certificate to that effect may be attached, as Exhibit B, in lieu of the certificate showing current Workers' Compensation.

d. If required by the Scope of Work, Contractor shall maintain for the duration of this Agreement professional liability insurance covering personal injury and property damage arising from errors, omissions, or malpractice. Coverage shall be in the minimum amount of \$500,000. Contractor shall provide to Metro a certificate of this insurance, and 30 days' advance notice of material change or cancellation.

e. Contractor shall provide Metro with a Certificate of Insurance complying with this article, and naming Metro as an additional insured within fifteen (15) days of execution of this contract, or twenty-four (24) hours before services under this contract commence, whichever date is earlier.

Attachment A – Personal Services Agreement

5. Indemnification. Contractor shall indemnify and hold Metro, its agents, employees and elected officials harmless from any and all claims, demands, damages, actions, losses and expenses, including attorney's fees, arising out of or in any way connected with its performance of this Agreement, or with any patent infringement or copyright claims arising out of the use of Contractor's designs or other materials by Metro and for any claims or disputes involving subcontractors.

6. Ownership of Documents and Maintenance of Records. Unless otherwise provided herein, all documents, instruments and media of any nature produced by Contractor pursuant to this agreement are Work Products and are the property of Metro, including but not limited to: drawings, specifications, reports, scientific or theoretical modeling, electronic media, computer software created or altered specifically for the purpose of completing the Scope of Work, works of art and photographs. Unless otherwise provided herein, upon Metro request, Contractor shall promptly provide Metro with an electronic version of all Work Products that have been produced or recorded in electronic media. Metro and Contractor agree that all work Products are works made for hire and Contractor hereby conveys, transfers, and grants to Metro all rights of reproduction and the copyright to all such Work Products.

a. Contractor and subcontractors shall maintain all fiscal records relating to such contracts in accordance with generally accepted accounting principles. In addition, Contractor and subcontractors shall maintain any other records necessary to clearly document:

- (1) The performance of the contractor, including but not limited to the contractor's compliance with contract plans and specifications, compliance with fair contracting and employment programs, compliance with Oregon law on the payment of wages and accelerated payment provisions; and compliance with any and all requirements imposed on the contractor or subcontractor under the terms of the contract or subcontract;
- (2) Any claims arising from or relating to the performance of the contractor or subcontractor under a public contract;
- (3) Any cost and pricing data relating to the contract; and
- (4) Payments made to all suppliers and subcontractors.

b. Contractor and subcontractors shall maintain records for the longer period of (a.) six years from the date of final completion of the contract to which the records relate or (b.) until the conclusion of any audit, controversy or litigation arising out of or related to the contract.

c. Contractor and subcontractors shall make records available to Metro and its authorized representatives, including but not limited to the staff of any Metro department and the staff of the Metro Auditor, within the boundaries of the Metro region, at reasonable times and places regardless of whether litigation has been filed on any claims. If the records are not made available within the boundaries of Metro, the Contractor or subcontractor agrees to bear all of the costs for Metro employees, and any necessary consultants hired by Metro, including but not limited to the costs of travel, per diem sums, salary, and any other expenses that Metro incurs, in sending its employees or consultants to examine, audit, inspect, and copy those records. If the Contractor elects to have such records outside these boundaries, the costs paid by the Contractor to Metro for inspection, auditing, examining and copying those records shall not be recoverable costs in any legal proceeding.

d. Contractor and subcontractors authorize and permit Metro and its authorized representatives, including but not limited to the staff of any Metro department and the staff of the Metro Auditor, to inspect, examine, copy and audit the books and records of Contractor or subcontractor, including tax returns, financial statements, other financial documents and any documents that may be placed in escrow according to any contract requirements. Metro shall keep any such documents confidential to the extent permitted by Oregon law, subject to the provisions of section E.

e. Contractor and subcontractors agree to disclose the records requested by Metro and agree to the admission of such records as evidence in any proceeding between Metro and the Contractor or subcontractor, including, but not limited to, a court proceeding, arbitration, mediation or other alternative dispute resolution process.

Attachment A – Personal Services Agreement

- f. Contractor and subcontractors agree that in the event such records disclose that Metro is owed any sum of money or establish that any portion of any claim made against Metro is not warranted, the Contractor or subcontractor shall pay all costs incurred by Metro in conducting the audit and inspection. Such costs may be withheld from any sum that is due or that becomes due from Metro.
- g. Failure of the Contractor or subcontractor to keep or disclose records as required by this document or any solicitation document may result in debarment as a bidder or proposer for future Metro contracts as provided in ORS 279B.130 and Metro Code Section 2.04.070(c), or may result in a finding that the Contractor or subcontractor is not a responsible bidder or proposer as provided in ORS 279B.110 and Metro Code Section 2.04.052.
7. Project Information. Contractor shall share all project information and fully cooperate with Metro, informing Metro of all aspects of the project including actual or potential problems or defects. Contractor shall abstain from releasing any information or project news without the prior and specific written approval of Metro.
8. Independent Contractor Status. Contractor shall be an independent contractor for all purposes and shall be entitled only to the compensation provided for in this Agreement. Under no circumstances shall Contractor be considered an employee of Metro. Contractor shall provide all tools or equipment necessary to carry out this Agreement, and shall exercise complete control in achieving the results specified in the Scope of Work. Contractor is solely responsible for its performance under this Agreement and the quality of its work; for obtaining and maintaining all licenses and certifications necessary to carry out this Agreement; for payment of any fees, taxes, royalties, or other expenses necessary to complete the work except as otherwise specified in the Scope of Work; and for meeting all other requirements of law in carrying out this Agreement. Contractor shall identify and certify tax status and identification number through execution of IRS form W-9 prior to submitting any request for payment to Metro.
9. Right to Withhold Payments. Metro shall have the right to withhold from payments due to Contractor such sums as necessary, in Metro's sole opinion, to protect Metro against any loss, damage, or claim which may result from Contractor's performance or failure to perform under this Agreement or the failure of Contractor to make proper payment to any suppliers or subcontractors.
10. State and Federal Law Constraints. Both parties shall comply with the public contracting provisions of ORS chapters 279A, 279B and 279C, and the recycling provisions of ORS 279B.025 to the extent those provisions apply to this Agreement. All such provisions required to be included in this Agreement are incorporated herein by reference. Contractor shall comply with all applicable requirements of federal and state civil rights and rehabilitation statutes, rules and regulations including those of the Americans with Disabilities Act.
11. Situs. The situs of this Agreement is Portland, Oregon. Any litigation over this agreement shall be governed by the laws of the State of Oregon and shall be conducted in the Circuit Court of the state of Oregon for Multnomah County, or, if jurisdiction is proper, in the U.S. District Court for the District of Oregon.
12. Assignment. This Agreement is binding on each party, its successors, assigns, and legal representatives and may not, under any circumstance, be assigned or transferred by either party.
13. Termination. This Agreement may be terminated by mutual consent of the parties. In addition, Metro may terminate this Agreement by giving Contractor seven days prior written notice of intent to terminate, without waiving any claims or remedies it may have against Contractor. Termination shall not excuse payment for expenses properly incurred prior to notice of termination, but neither party shall be liable for indirect or consequential damages arising from termination under this section.
14. No Waiver of Claims. The failure to enforce any provision of this Agreement shall not constitute a waiver by Metro of that or any other provision.



600 NE Grand Ave.
Portland, OR 97232-2736
503-797-1700

Attachment A – Personal Services Agreement

15. Modification. Notwithstanding and succeeding any and all prior agreement(s) or practice(s), this Agreement constitutes the entire Agreement between the parties, and may only be expressly modified in writing(s), signed by both parties.

By _____
Title _____
Date _____

METRO
By _____
Title _____
Date _____

SA:gbc
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