



Purchasing and Contract Services

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REQUEST FOR QUOTES (RFQ) #2014-25

Issue Date: July 29, 2014

Project Name:	STEM Professional Marketing Services		
BID Due Date/Time:	August 11, 2014, 1:00 PM		
Project Coordinator:	Carleen Drago Starr	Phone:	503-821-1297
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SUBMIT QUOTES VIA EMAIL TO PURCHASING@OIT.EDU OR MAIL/HAND DELIVERY TO THE ABOVE WILSONVILLE ADDRESS TO GEORGE MARLTON

PLEASE NOTE: EMAIL SUBMISSIONS SHOULD HAVE “RFQ #2014-25” IN THE SUBJECT LINE

1. ANNOUNCEMENT AND SPECIAL INFORMATION

Quoters are required to read and understand and comply with all information contained within this RFQ. All quotes are binding upon Quoter for thirty (30) days from the RFQ Due Date/Time. All payments for services will be paid in accordance to OAR 580-061-0050. Quotes received after the RFQ Due Date/Time may not be considered. Travel and other expense reimbursement will only be reimbursed in accordance with the OIT Contractor’s Travel Reimbursement Policy at the time the expense is incurred.

It will be the responsibility of potential Quoters to refer daily to the OUS Procurement Gateway website (<https://secure.ous.edu/bid/>) to check for any available addenda, response to clarifying questions, cancellations or other information pertaining to this Request for Quotes.

2. SCOPE

The purpose of this RFQ is to acquire the services of a professional marketing/public relations firm that will complete marketing/outreach projects for the South Metro-Salem STEM Hub’s Accelerated Credit Work Group (ACWG). Specifically, we hope to complete the following marketing pieces, which need to be inclusive of outreach on dual credit to underrepresented populations (including but not limited to first-generation, low-income and students/families of color):

- Student Testimonial Video
- Dual Credit Print/Electronic Outreach Materials
- An overarching message platform that will be reflected in the above materials

See attached Exhibit A - Scope of Work for ACWG Marketing Projects

The selected firm will refine the project scope and deliverables upon conclusion of the kick-off meeting.

The project has a maximum budget of \$25,000. By providing the maximum budget amount, Oregon Tech does not intend for firms to propose at that fixed amount but instead to provide a professional, competitive proposal. We request that each deliverable be priced independently. Firms may

subcontract a portion of the work, if appropriate. If any portion is subcontracted, information on the subcontractor must be included in the Quote.

3. Quote

Quotes should be short and concise (8 pages maximum) with the following information:

- A. Company experience in these types of projects;
- B. Identify key staff that would be assigned to the project and describe experience in similar projects;
- C. Provide a fee on a time and material basis with a not-to-exceed for the project. Note to price deliverables separately. Total fee should still fit within the above referenced budget;
- D. Provide 3 client references for similar projects (include email and phone number);
- E. Methodology and timeline for conducting all facets of the project, including estimated time to complete the project.
- F. Any additional information that Oregon Tech should take into consideration for the project or qualifications.

4. Evaluation

Quotes will be evaluated based on subjective factors including, but not limited to: company experience, staff experience, not-to-exceed price for the project, references, and proposal to complete the project (including timeline).

**OREGON INSTITUTE OF TECHNOLOGY
CERTIFICATIONS
RFQ #2014-25**

Each Quoter must read, complete and submit a copy of this Oregon Institute of Technology Certification with their Quote. Failure to do so may result in rejection of Quote. By signature on this Certification the undersigned certifies that they are authorized to act on behalf of the Quoter and that under penalty of perjury the undersigned will comply with the following:

SECTION I. OREGON TAX LAWS

As required in ORS 305.385(6) the undersigned hereby certifies that to the best of the undersigned's knowledge, the Entity is not in violation of any Oregon Tax Laws. For purposes of this certification, "Oregon Tax Laws" means a state tax imposed by ORS 401.792 to 401.816 and ORS chapters 118, 314, 316, 317, 318, 320, 321 and 323; the elderly rental assistance program under ORS 310.630 to 310.706; and local taxes administered by the Department of Revenue under ORS 305.620. If a Contract is executed, this information will be reported to the Internal Revenue Service. Information not matching IRS records could subject Contractor to 31% backup withholding.

SECTION II. AFFIRMATIVE ACTION

The undersigned hereby certifies that they have not discriminated against Minority, Women or Emerging Small Business Enterprises in obtaining any required subcontracts, pursuant to OAR 580-061-0030(3).

SECTION III. COMPLIANCE WITH SOLICITATION

The undersigned further agrees and certifies that they:

1. Have read, understand and agree to be bound by and comply with all requirements, instructions, specifications, terms and conditions of the RFQ (including any attachments); and
2. Are an authorized representative of the Quoter, that the information provided is true and accurate, and that providing incorrect or incomplete information may be cause for rejection of the Quote or contract termination; and
3. Will furnish the designated item(s) and/or service(s) in accordance with the RFQ and Quote.

Firm Name: _____ Date: _____
Signature: _____ Title: _____
Name (Type or Print): _____ Telephone: _____
Email: _____ OR CCB # (if applicable): _____

Business Designation (check one):

Corporation Partnership Sole Proprietorship Non-Profit Limited Liability Company

Oregon Certified Minority, Women, or Emerging Small Business: (Mark if applicable and certification #)

Minority: _____ Women: _____ ESB: _____

Self-Reported Minority, Women, or Emerging Small Business: (Mark if applicable)

Minority: _____ Women: _____ ESB: _____

OREGON INSTITUTE OF TECHNOLOGY INSTRUCTIONS TO QUOTERS

Quotes are subject to the applicable provisions and requirements of the Oregon Administrative Rules and Oregon Revised Statutes.

QUOTE PREPARATION

1. **QUOTE FORMAT:** Quotes must be submitted as indicated in the RFQ. Quotes may be submitted in writing to OIT office via e-mail, mail or in person.
2. **CONFORMANCE TO RFQ REQUIREMENTS:** Quotes must conform to the requirements of the RFQ. Unless otherwise specified, all items quoted are to be new, unused and not remanufactured in any way. Any requested attachments must be submitted with the quote and in the required format. Quote prices must be for the unit indicated on the quote. Failure to comply with all requirements may result in quote rejection.
3. **ADDENDA:** Only documents issued as addenda by OIT serve to change the RFQ in any way. No other directions received by the Quoter, written or verbal, serve to change the RFQ document. **NOTE: IF YOU HAVE RECEIVED A COPY OF THE RFQ, YOU SHOULD CONSULT THE UNIVERSITY PROCUREMENT GATEWAY WEBSITE (<https://secure.ous.edu/bid/>) TO ENSURE THAT YOU HAVE NOT MISSED ANY ADDENDA OR ANNOUNCEMENTS. QUOTERS ARE NOT REQUIRED TO RETURN ADDENDUMS WITH THEIR QUOTE. HOWEVER, QUOTERS ARE RESPONSIBLE TO MAKE THEMSELVES AWARE OF, OBTAIN AND INCORPORATE ANY CHANGES MADE IN ANY ADDENDUMS ISSUED, AND TO INCORPORATE ANY CHANGES MADE BY ADDENDUM INTO THEIR FINAL QUOTE. FAILURE TO DO SO MAY, IN EFFECT, MAKE THE QUOTER'S QUOTE NON-RESPONSIVE, WHICH MAY CAUSE THE QUOTE TO BE REJECTED.**
4. **USE of BRAND or TRADE NAMES:** Any brand or trade names used by OIT in RFQ specifications are for the purpose of describing and establishing the standard of quality, performance and characteristics desired and are not intended to limit or restrict competition. Quoters may submit quotes for substantially equivalent products to those designated unless the RFQ provides that a specific brand is necessary because of compatibility requirements, etc. All such brand substitutions shall be subject to approval by OIT.
5. **PRODUCT IDENTIFICATION:** Quoters must clearly identify all products quoted. Brand name and model or number must be shown. OIT reserves the right to reject any quote when the product information submitted with the quote is incomplete.
6. **FOB DESTINATION:** Unless specifically allowed in the RFQ, ***QUOTE PRICE MUST BE F.O.B. DESTINATION with all transportation and handling charges paid by the Quoter.***
7. **DELIVERY:** Delivery time must be shown in number of calendar days after receipt of purchase order.
8. **EXCEPTIONS:** Any deviation from quote specifications, or the Oregon Institute of Technology Professional Services Contract may result in quote rejection.
9. **SIGNATURE ON QUOTE:** Quotes must be signed by an authorized representative of the Quoter. Signature on a quote certifies that the quote is made without connection with any person, firm or corporation making a quote for the same goods and/or services and is in all respects fair and without collusion or fraud. Signature on a quote also certifies that the Quoter has read and fully understands all quote specifications, and the Oregon Institute of Technology Professional Services Contract (including insurance requirements). No consideration will be given to any claim resulting from quoting without comprehending all requirements of the RFQ.
10. **QUOTE MODIFICATION:** Quotes, once submitted, may be modified in writing before the time and date set for quote closing. Any modifications should be signed by an authorized representative, and state that the new document supersedes or modifies the prior quote. Quoters may not modify quotes after quote closing time.
11. **QUOTE WITHDRAWALS:** Quotes may be withdrawn by request in writing signed by an authorized representative and received by OIT prior to quote closing time. Quotes may also be withdrawn in person before quote closing time upon presentation of appropriate identification.

- 12. QUOTE SUBMISSION:** Quotes may be submitted by returning to OIT Purchasing and Contract Services Office in the location designated in the introduction of the RFQ via e-mail, mail or in person but no oral or telephone quotes will be accepted. Envelopes, or e-mails containing Quotes should contain the RFQ Number and RFQ Title.

QUOTE EVALUATION AND AWARD

- 1. PRIOR ACCEPTANCE OF DEFECTIVE PROPOSALS:** Due to limited resources, OIT generally will not completely review or analyze quotes which fail to comply with the requirements of the RFQ or which clearly are not the best quotes, nor will OIT generally investigate the references or qualifications of those who submit such quotes. Therefore, neither the return of a quote, nor acknowledgment that the selection is complete shall operate as a representation by OIT that an unsuccessful quote was complete, sufficient, or lawful in any respect.
- 2. DELIVERY:** Significant delays in delivery may be considered in determining award if early delivery is required.
- 3. CASH DISCOUNTS:** Cash discounts will not be considered for award purposes unless stated in the RFQ.
- 4. PAYMENT:** Quotes which require payment in less than 30 days after receipt of invoice or delivery of goods, whichever is later, may be rejected.
- 5. INVESTIGATION OF REFERENCES:** OIT reserves the right to investigate references and or the past performance of any Quoter with respect to its successful performance of similar services, compliance with specifications and contractual obligations, and its lawful payment of suppliers, sub-contractors, and workers. OIT may postpone the award or execution of the contract after the announcement of the apparent successful Quoter in order to complete its investigation. OIT reserves the right to reject any quote or to reject all quotes at any time prior to OIT's execution of a contract if it is determined to be in the best interest of OIT to do so.
- 6. METHOD OF AWARD:** OIT reserves the right to make the award by item, groups of items or entire quote, whichever is in the best interest of OIT.
- 7. QUOTE REJECTION:** OIT reserves the right to reject any and all quotes.
- 8. QUOTE RESULTS:** Quoters who submit a quote will be notified of the RFQ results. Awarded quote files are public records and available for review by appointment.

Exhibit A
Oregon Tech and South Metro-Salem STEM Hub
Scope of Work for ACWG Marketing Projects
Draft: June 24th, 2014

The South Metro-Salem (SMS) STEM Partnership has been selected to be a STEM Hub by the State of Oregon. Each of the state's six designated Hubs have proposed a unique theory of change related to expanding STEM education in Oregon. The SMS Hub, under the direction of Oregon Tech, has established a vision, mission, goals and strategies. The SMS Hub is seeking a marketing/public relations firm to work with their Accelerated Credit Work Group to strategically complete outreach, using strong educational attainment messages, to high school students/families, especially those from underrepresented groups, including but not limited to ethnic and racial minorities, first-generation college students, students of poverty, and girls, around accelerated/dual credit.

Marketing SMS ACWG – Dual Credit

The ACWG is charged with providing marketing/outreach materials to promote and get students excited about accelerated credit opportunities. Accelerated credit is used as a generic term to describe programs that grant high school students college-level credit while attending their high school; it is often used interchangeably with “dual credit” or “dual enrollment”. In most dual credit programs, high schools will work with their local community college or a 4-year education partner to articulate high school course work to a college-level class. In Oregon, dual credit courses are delivered at greatly reduced fees for high school students, and for students of poverty, courses are often free. The SMS STEM ACWG has four active dual credit granting colleges involved in reaching their SMS STEM goals: Chemeketa Community College, Clackamas Community College, Oregon Tech, and Portland Community College.

Each marketing/outreach piece will be produced on behalf of the SMS STEM Partnership ACWG and will cultivate strong messages about the power of accelerated/dual credit programs, including the value/benefit to students and families, and promote a college-going culture among high school students. The marketing/public relations firm must develop and deliver materials that will engage all high school students with a specific focus on targeting underrepresented student populations in the 16 school districts in the partnership.

To learn more about accelerated credit please review each partner website and the National Alliance of Concurrent Enrollment Partnerships:

Clackamas CC: <http://depts.clackamas.edu/acc/>

Chemeketa CC: <https://www.chemeketa.edu/mwec/ccn/>

Oregon Tech: <http://www.oit.edu/academics/youth-programs/advance-credit-program-acp>

Portland CC: <http://www.pcc.edu/prepare/head-start/dual-credit/>

NACEP: <http://www.nacep.org/>

Deliverables

The ACWG desires to produce a number of marketing/outreach materials. Specifically, we want a marketing/public relations firm that can collaborate with multiple stakeholders to produce

media and print materials that resonate with high school students. The marketing project has three main objectives:

1. Organize and produce a video with student (and possibly parent) testimonials about how dual credit “helped” them through their academic journey.
2. Develop proofs of print or electronic materials with strategic messaging that engages students and their families about the value of dual credit programs. Any printing completed will be through Oregon Tech’s print services or the firm will facilitate the production with a qualified print firm. Oregon Tech will direct pay for print jobs.
3. Develop a strategic outreach campaign, including a messaging platform, and using appropriate media channels (based on collaboration between ACWG and marketing/public relations firm) to effectively reach underrepresented student populations (print, web, social media, etc.).

Timeline

The firm will be expected to propose concepts by: September 18th, 2014

Proofs of the deliverables will be provided by: October 24th, 2014

Final deliverables will be provided by: November 20th, 2014