

**REQUEST FOR PROPOSAL**  
**RFP #25229 ADVERTISING AND MARKETING SERVICES**

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Questions will be received until February 7, 2025, 2:00PM EDST

Proposals will be received until February 19, 2025, 3:00PM EDST

**REQUEST FOR PROPOSAL**  
**RFP #25229 ADVERTISING AND MARKETING SERVICES**

**SECTION 1: GENERAL INFORMATION**

**1.1 Introduction and Purpose:** The West Virginia Higher Education Policy Commission (Commission) and West Virginia Council for Community and Technical Education (Council) are seeking competitive proposals from qualified vendors for a full-service advertising agency to work collaboratively as a partner in producing successful advertising and marketing services for their financial aid programs and student-focused initiatives.

**Agency/Institution Information:** The Commission is the coordinating board for the state's four-year public higher education system. The agency also administers more than \$110 million in state need- and merit-based student financial aid programs, including the Promise Scholarship, the West Virginia Higher Education Grant Program, a statewide dual enrollment initiative, and the Underwood-Smith Teaching Scholars Program. The Council serves as the coordinating body for the state's two-year community and technical colleges. Among other statewide programs, the Council administers the West Virginia Invests Program, a last-dollar-in grant that covers full tuition and fees at two-year institutions. All these programs fall under the umbrella of West Virginia's Climb initiative, which seeks to arm 60 percent of working-aged West Virginians with a credential beyond high school by 2030.

**1.2 Instructions to bidders:** See Exhibit A for-bidder instructions.

**1.3 General terms and conditions:** See Exhibit B.

**1.4 Schedule of Events:**

Release of RFP:	January 29, 2025
Question Deadline:	February 7, 2025 by 2:00PM EST
Addendum/Response to Questions:	February 11, 2025
Proposal Due Date:	February 19, 2025 by 3:00PM EST
Target Award Date:	March 31, 2025 with effective date of April 5, 2025

**1.5 Posting of Information:** This RFP and any addenda, including answers to questions, will be posted at <https://www.wvhepc.edu/resources/purchasing-and-finance/>.

**1.6** Proposals shall remain in effect ninety (90) days from the submission date.

**1.7 Expenses:** The state will not be held liable for any expenses incurred by any bidder responding to this RFP including expenses to prepare or deliver the proposal or attend any oral presentation.

**1.8 Award:** It is anticipated that a single contract will be awarded for all services. However, the state reserves the right to configure the contract in whatever manner is in its' best interests.

## **SECTION 2: BACKGROUND INFORMATION**

**2.1 Introduction and Purpose:** The West Virginia Higher Education Policy Commission (Commission) and West Virginia Council for Community and Technical Education (Council) are seeking competitive proposals from qualified vendors for a full-service advertising agency to work collaboratively as a partner in producing successful advertising and marketing services for their financial aid programs and student-focused initiatives.

**2.2 Agency/Institution Information:** The Commission is the coordinating board for the state's four-year public higher education system. The agency also administers more than \$110 million in state need- and merit-based student financial aid programs, including the Promise Scholarship, the West Virginia Higher Education Grant Program, a statewide dual enrollment initiative, and the Underwood-Smith Teaching Scholars Program. The Council serves as the coordinating body for the state's two-year community and technical colleges. Among other statewide programs, the Council administers the West Virginia Invests Program, a last-dollar-in grant that covers full tuition and fees at two-year institutions. All these programs fall under the umbrella of West Virginia's Climb initiative, which seeks to arm 60 percent of working-aged West Virginians with a credential beyond high school by 2030.

The initial contract term will begin April 5, 2025 and extend through April 4, 2026. The contract may be renewed annually for up to seven (7) years upon mutual agreement between both parties and satisfactory performance by the vendor.

## **SECTION 3: SCOPE OF SERVICES**

The contractor's primary responsibility is to develop and implement advertising programs following direction from the Commission and Council. The Commission and Council will include the contractor in all phases of marketing planning and idea generation to provide the contractor with as much information as possible, and to benefit from the contractor's experience, creativity, and knowledge.

Contractor responsibilities will include, but will not be limited to:

- Strategic advertising and promotional planning;
- Digital services and social media planning and execution;
- Print, broadcast, and promotional creative planning and execution;
- Print, broadcast, and promotional materials production;
- Print and broadcast media planning and execution;
- Media services, planning, negotiation and placement;
- Media placement verification and post-buy analysis;
- Branding and redesign;
- Direct marketing consultation;
- Public relations expertise and support of event planning;
- Website consultation and creative application;
- Budget control and shared responsibility for cost control;

- Assisting with agency-led events;
- Providing analysis, advice, and support for key Commission and Council programs and initiatives;
- Providing cost estimates prior to work being performed;
- Including a mark-up fee no greater than 3%;
- Providing all design files to the Commission and Council, which will retain ownership of all artwork;
- Providing third-party vendor payment for services in advance and invoices to the Commission and/or Council showing proof of payment; and,
- Including associated travel costs in pricing.

The contractor's primary focal areas will include the following programs and initiatives, with priority programs listed first and in detail, followed by additional programs that will require lesser support throughout the duration of the contract.

### ***Priority Programs***

#### **West Virginia Invests Grant**

**More information & application available: CFWV.com**

West Virginia Invests is a last dollar financial aid program designed to cover the cost of basic tuition and fees for certificate or associate degree programs in specific high-demand fields at participating West Virginia public institutions. Ten public institutions with 27 campuses located across the state are participating in West Virginia Invests. Following other financial aid, the grant covers tuition and fee costs for certificate and associate degree programs in certain high demand fields, as identified by the West Virginia Department of Commerce, in areas ranging from welding to medical coding to hospitality.

#### **FAFSA/West Virginia Higher Education Grant**

**More information & application available: CFWV.com**

The agencies coordinate statewide outreach around completion of the Free Application for Federal Student Aid (FAFSA) each year. This form is the key to unlocking all financial aid for college, including federal, private and state. In West Virginia, by filling out the form a student automatically applies for the need-based Higher Education Grant.

#### **Workforce Partnerships**

**More information: WVCTCS.edu**

The Council administers programs that create workforce development partnerships between the state's nine community and technical colleges and business and industry. For example, Learn & Earn is a state-funded grant program designed to support paid internship opportunities for students attending a community college. The program provides funding to pay half a student intern's wages while they are in school, allowing employers to fill an immediate workforce need while the student earns their credentials.

### **LevelUp WV**

**More information: [WVClimb.com](http://WVClimb.com)**

In 2023, the West Virginia Legislature established West Virginia's first state-funded dual enrollment program for high school students. As a result, the Commission and Council have launched the LevelUpWV pilot program that covers the costs of dual enrollment courses offered by the state's colleges and universities that are tied to some of West Virginia's most in-demand careers. The focus of LevelUpWV is to place West Virginia's high school students – of all income levels and backgrounds – on a technical training or educational track to long-term, successful careers in the state.

### **Microcredential WV**

**More information: [WVClimb.com](http://WVClimb.com)**

Microcredentials are short, focused learning experiences that help students develop specific, in-demand skills in a way that's more flexible and accessible than traditional degrees. With the rise of this innovative approach, West Virginia is stepping up to equip its students with the tools they need to thrive in today's evolving workforce. Through Credential WV, the state is rolling out stackable credentials that empower students to gain industry-recognized skills tailored to the needs of the local job market.

### **Open Learning WV**

**More information: [WVClimb.com](http://WVClimb.com)**

Open Educational Resources (OER) are low- to no-cost course materials (textbooks, for example) that higher education institutions and faculty can adopt for their classes so that the materials students need for their classes are as inexpensive as possible. Using OER helps every student because it greatly decreases the cost of textbooks and course materials. Since West Virginia launched its OER program, Open Learning WV, in 2021, students have experienced an aggregate savings of \$7.75 million.

## ***Additional Programs and Initiatives***

### **Promise Scholarship Program**

**More information & application available: [CFWV.com](http://CFWV.com)**

A merit-based scholarship for qualifying West Virginia high school graduates that provides up to \$5,500 per academic year.

### **West Virginia STEM Scholarship**

**More information & application available: [CFWV.com](http://CFWV.com)**

A scholarship available to qualified students interested in pursuing an education in engineering, science math, or technology that provides up to \$3,000 per academic year.

### **Underwood-Smith Teaching Scholars Program**

**More information & application available: [CFWV.com](http://CFWV.com)**

Invites high-achieving high school seniors from within the state and across the country to apply for one of 25 annual slots. To address the teacher shortage crisis, these scholars commit to teaching in a high-demand field in West Virginia and, in exchange, receive a \$10,000 annual scholarship (up to \$40,000 over four years).

**Higher Education Adult Part-Time Student Grant Program (HEAPS)**

**More information & application available: CFWV.com**

A need-based grant for adult students enrolled on a part-time basis or in an eligible workforce program.

**West Virginia Health Sciences Service Program**

**More information & application available: CFWV.com**

A service-obligation scholarship for health profession students interested in primary care and rural health in West Virginia.

**West Virginia Nursing Scholarship Program**

**More information & application available: CFWV.com**

A range of scholarship/loan opportunities to assist current and future West Virginia nursing professionals with their education.

**Choose West Virginia Practice Program**

**More information & application available: CFWV.com**

A tuition waiver program that incentivizes nonresident West Virginia medical students to remain in West Virginia to practice.

**Underwood-Smith Teacher Loan Repayment Program**

**More information & application available: CFWV.com**

Loan assistance program available to teachers and school counselors agreeing to teach or serve full-time in West Virginia in an area of critical need and in geographic areas of the state experiencing critical shortages of teachers or counselors.

**Mental Health Loan Repayment Program**

**More information & application available: CFWV.com**

Provides student loan assistance for practicing mental health professionals to deliver therapy or counseling services in underserved areas of West Virginia.

**SECTION 4: VENDOR INFORMATION AND QUALIFICATIONS**

Provide a statement/response to each of the following:

- 4.1 Identify and provide a statement of qualifications of individuals to be assigned direct responsibility for the services and description of vetting process to validate subject matter expertise.
- 4.2 Describe the experience that key personnel have, their length of service with the firm, as well as other relevant skills.
- 4.3 Describe the Firm's size, illustrating its ability to fulfill the terms of the RFP.
- 4.4 Provide a written description detailing experience and any higher education-related work, explaining how the firm will provide the services outlined, and describing a complete campaign the firm has completed within the last three years.
- 4.5 Provide a complete description of how the work will be conducted, including all quality assurances that are provided in the firm's process for this type of work and detail the amount of time and effort that will be required of the entities' personnel. Include in this description an explanation of the tools/technology used to coordinate requested items.
- 4.6 Provide a proposed schedule that ensures completion of the services.
- 4.7 Provide the names, telephone numbers and mailing addresses of at least three (3) higher education or state agency clients and the contact person from whom references may be obtained for both the firm and the key personnel assigned to the engagement. References should be from clients comparable to the type and scope of services solicited in this RFP.

## **SECTION 5: BIDDER RESPONSE AND EVALUATION CRITERIA**

- 5.1 Economy of Preparation: Proposals should be prepared simply and economically, providing a straightforward, concise description of the bidder's ability to satisfy the requirements of the RFP. Emphasis should be placed on completeness and clarity of content.

**NOTE: ALL PRICES ARE TO BE PROVIDED USING THE ATTACHED COST SHEET IN A SEPARATE EMAIL CLEARLY LABELED AS PRICING INFORMATION.**

- 5.2 Proposals should be limited to 100 pages. Additional material may be presented as exhibits to the main proposal.
- 5.3 The proposal will be evaluated on a one hundred (100) point scale with points assigned as outlined below.

**Vendors failing to score at least 70% or 49 points for Sections 5.3.1 and 5.3.2 will not be considered to have met the minimum acceptable score. Any vendor not meeting the minimum acceptable score will NOT have their prices opened and will NOT be considered for the award of the bid.**

5.3.1 Qualifications, Experience and Company Background – 40 points

Responses to Section 4 will be reviewed and evaluated here.

5.3.2 Services – 30 points

Responses to Section 2 and 3 will be reviewed and evaluated here.

5.4. Price – 30 points – The low bid will receive the full 30 points. Each higher bid will receive a percentage of the 30 points on a ratio basis compared to the low bid cost. ALL COST MUST BE SUBMITTED USING EXHIBIT H COST SHEET.

5.5 Award will be made to the bidder receiving the highest point total.

5.6 In the event that mutually acceptable terms cannot be reached within a reasonable period of time, with the highest ranked bidder, the state reserves the right to undertake negotiations with the next highest ranked bidder and so on until mutually acceptable terms can be reached.



## INSTRUCTIONS TO BIDDERS

**1. REVIEW DOCUMENTS THOROUGHLY:** The attached documents contain an RFP/RFB for bids. Please read these instructions and all documents attached in their entirety. These instructions provide critical information about requirements that if overlooked could lead to disqualification of a vendor's bid. All bids must be submitted in accordance with the provisions contained in these instructions and the Request for Proposals (RFP) or Request for Bids (RFB). Failure to do so may result in disqualification of vendor's bid.

**2. MANDATORY TERMS:** The RFP/RFB may contain mandatory provisions identified by the use of the words "must," "will," and "shall." Failure to comply with a mandatory term in the RFP/RFB will result in bid disqualification.

**3. PREBID MEETING:** The item identified below shall apply to this RFP/RFB.

☒ A pre-bid meeting will not be held prior to bid opening

☐ A **MANDATORY PRE-BID** meeting will be held at the following place and time:

All vendors submitting a bid must attend the mandatory pre-bid meeting. Failure to attend the mandatory pre-bid meeting shall result in disqualification of the vendor's bid. No one individual is permitted to represent more than one vendor at the pre-bid meeting. Any individual that does attempt to represent two or more vendors will be required to select one vendor to which the individual's attendance will be attributed. The vendors not selected will be deemed to have not attended the pre-bid meeting unless another individual attended on their behalf.

**4. VENDOR QUESTION DEADLINE:** Vendors may submit questions relating to this RFP/RFB. Questions must be submitted in writing. All questions must be submitted on or before the date listed below and to the e-mail address listed below to be considered. Submitted e-mails should have RFP/RFB number in the subject line.

A written response will be published in an RFP/RFB addendum if a response is possible and appropriate. Non-written discussions, conversations, or questions and answers regarding this RFP/RFB are preliminary in nature and are nonbinding.

Submit Questions by Deadline in Schedule of Events to: [bid.receipt@wvhepc.edu](mailto:bid.receipt@wvhepc.edu)

**5. VERBAL COMMUNICATION:** Any verbal communication between the vendor and any Commission/Council/Institution personnel is not binding, including verbal communication at the mandatory pre-bid conference. Only information issued in writing and added to the RFP/RFB by an official written addendum is binding.

**6. BID SUBMISSION:** All bids must be submitted electronically to the e-mail address identified in the bid document.

**7. BID OPENING:** Bids submitted in response to this RFP/RFB will be on the date and time

listed below. Delivery of a bid, after the bid opening date and time will result in bid disqualification.

Bid Opening Date and Time: February 19, 2025 @ 3:00 pm EST

**8. ADDENDUM ACKNOWLEDGEMENT:** Changes or revisions to this RFP/RFB will be made by an official written addendum. Vendor should acknowledge receipt of all addenda issued with this RFP/RFB by completing an Addendum Acknowledgment Form, a copy of which is included herewith. Failure to acknowledge addenda may result in bid disqualification. The addendum acknowledgement should be submitted with the bid to expedite document processing.

**9. BID FORMATTING:** Vendor should type or electronically enter the information onto its bid to prevent errors in the evaluation. Failure to type or electronically enter the information may result in bid disqualification.

**10. ALTERNATE MODEL OR BRAND:** Any model, brand, or specification listed in this RFP/RFB establishes the acceptable level of quality only and is not intended to reflect a preference for, or in any way favor, a particular brand or vendor. Vendors may bid alternates to a listed model or brand provided that the alternate is at least equal to the model or brand and complies with the required specifications. The equality of any alternate being bid shall be determined by the Commission/Council/Institution's sole discretion. Any vendor bidding an alternate model or brand should clearly identify the alternate items in its bid and should include manufacturer's specifications, industry literature, and/or any other relevant documentation demonstrating the equality of the alternate items. Failure to provide information for alternate items may be grounds for rejection of a vendor's bid.

**11. EXCEPTIONS AND CLARIFICATIONS:** The RFP/RFB contains the specifications that shall form the basis of a contractual agreement. Vendor shall clearly mark any exceptions, clarifications, or other proposed modifications in its bid. Exceptions to, clarifications of, or modifications of a requirement or term and condition of the RFP/RFB may result in bid disqualification.

**12. COMMUNICATION LIMITATIONS:** Communication with the Commission/Institution or any of its employees regarding this RFP/RFB during the RFP/RFB, bid, evaluation, or award periods, except through the Director of Procurement, is strictly prohibited without prior approval.

**13. REGISTRATION:** Prior to award of any contract award in the amount of \$25,000 or greater, the apparent successful vendor must be properly registered with the West Virginia Purchasing Division and must have paid the \$125 fee, if applicable.

**14. UNIT PRICE:** Unit prices shall prevail in cases of a discrepancy in the vendor's bid.

**15. WAIVER OF MINOR IRREGULARITIES:** The Commission/Council/Institution reserves the right to waive minor irregularities in bids or specifications .

**16. NON-RESPONSIBLE:** The Commission/Council/Institution reserves the right to reject  
Form Origination Date: 03/30/2022

the bid of any vendor as Non-Responsible in accordance with W. Va. Code of State Rules § 148-1- 5.3, when the Director determines that the vendor submitting the bid does not have the capability to fully perform or lacks the integrity and reliability to assure good-faith performance.”

**17. ACCEPTANCE/REJECTION:** The Commission/Council/Institution may accept or reject any bid in whole, or in part if it is found to be in the best interest of the Commission/Council/Institution.

**18. YOUR SUBMISSION IS A PUBLIC DOCUMENT:** Vendor’s entire response to the RFP/RFB and the resulting Contract are public documents. As public documents, they will be disclosed to the public following the bid/proposal opening or award of the contract, as required by the Freedom of Information Act West Virginia Code §§ 29B-1-1 et seq.

DO NOT SUBMIT MATERIAL YOU CONSIDER TO BE CONFIDENTIAL, A TRADE SECRET, OR OTHERWISE NOT SUBJECT TO PUBLIC DISCLOSURE.

Submission of any bid, proposal, or other document to the Commission/Council/ Institution constitutes your explicit consent to the subsequent public disclosure of the bid, proposal, or document. The Commission/Council/Institution will disclose any document labeled “confidential,” “proprietary,” “trade secret,” “private,” or labeled with any other claim against public disclosure of the documents, to include any “trade secrets” as defined by West Virginia Code § 47-22-1 et seq. All submissions are subject to public disclosure without notice.

**19. INTERESTED PARTY DISCLOSURE:** West Virginia Code § 6D-1-2 requires that the vendor submit a disclosure of interested parties to the contract for all contracts with an actual or estimated value of at least \$1 million. That disclosure must occur on the form prescribed and approved by the WV Ethics Commission prior to contract award.

A copy of that form is included with this RFP/RFB or can be obtained from the WV Ethics Commission. This requirement does not apply to publicly traded companies listed on a national or international stock exchange. A more detailed definition of interested parties can be obtained from the form referenced above.

**20. WITH THE BID REQUIREMENTS:** In instances where these specifications require documentation or other information with the bid, and a vendor fails to provide it with the bid, the Commission/Council/Institution reserves the right to request those items after bid opening and prior to contract award

**21. EMAIL NOTIFICATION OF AWARD:** The Commission/Council/Institution will attempt to provide bidders with e-mail notification of contract award when an RFP/RFB that the bidder participated in has been awarded. For notification purposes, bidders must provide the Commission/Council/Institution with a valid email address in the bid response. Bidders may also monitor Commission/Council/Institution’s websites to determine when a contract has been awarded.

## **GENERAL TERMS AND CONDITIONS:**

**1. CONTRACTUAL AGREEMENT:** Issuance of a Purchase Order signed by the Commission/Institution's Chief Procurement Officer or Director of Purchasing, or their designee, and approved as to form by the Attorney General's Office constitutes acceptance by the Commission/Institution of this Contract made by and between the Commission/Institution and the Vendor. Vendor's signature on its bid, or on the Contract if the Contract is not the result of a bid RFP/RFB, signifies vendor's agreement to be bound by and accept the terms and conditions contained in this Contract.

**2. DEFINITIONS:** As used in this RFP/RFB/Contract, the following terms shall have the meanings attributed to them below. Additional definitions may be found in the specifications included with this RFP/RFB/Contract.

**2.1. "Agency" or "Agencies"** means the agency, institution, board, commission, or other entity of the State of West Virginia that is identified on the first page of the RFP/RFB or any other public entity seeking to procure goods or services under this Contract.

**2.2. "Bid" or "Proposal"** means the vendors submitted response to this RFP/RFB.

**2.3. "Chief Procurement Officer" or "Director of Purchasing"** means the individual authorized to sign Purchase Order/Contracts.

**2.4. "Commission/Institution"** means the entity identified on the first page of the RFP/RFB who is issuing the solicitation.

**2.5. "Contract" or "Purchase Order"** means the binding agreement that is entered into between the Commission /Institution and the vendor to provide the goods or services requested in the RFP/RFB.

**2.6. "Award Document"** means the document signed by the Commission/Institution and approved as to form by the Attorney General, that identifies the vendor as the contract holder.

**2.7. "RFP/RFB"** means the official notice of an opportunity to supply the Commission/Institution with goods or services.

**2.8. "State"** means the State of West Virginia and/or any of its agencies, institutions, commissions, boards, institutions etc. as context requires.

**2.9. "Vendor" or "Vendors"** means any entity submitting a bid in response to the RFP/RFB, the entity that has been selected as the lowest responsible bidder, or the entity that has been awarded the Contract as context requires.

**3. CONTRACT TERM; RENEWAL; EXTENSION:** The term of this Contract shall be determined in accordance with the category that has been identified as applicable to this Contract below:

☒ **Term Contract**

**Initial Contract Term:** The Initial Contract Term will be for a period of 1 year. The Initial Contract Term becomes effective on the effective start date listed on the first page of this Contract and the Initial Contract Term ends on the effective end date also shown on the first page of this Contract.

**Renewal Term:** This Contract may be renewed upon the mutual written consent of the Commission/Institution, and the Vendor, with approval of the Attorney General's Office (Attorney General approval is as to form only) for 7 successive years. Any request for renewal should be delivered to the Commission/Institution thirty (30) days prior to the expiration date of the contract.

Automatic renewal of this Contract is prohibited.

**Delivery Order Limitations:** In the event that this contract permits delivery orders, a delivery order may only be issued during the time this Contract is in effect. Any delivery order issued within one year of the expiration of this Contract shall be effective for one year from the date the delivery order is issued. No delivery order may be extended beyond one year after this Contract has expired.

☐ **One-Time Purchase:** The term of this Contract shall run from the issuance of the Purchase Order until all of the goods contracted for have been delivered, but in no event will this Contract extend for more than one fiscal year.

☐ **Other:** Contract Term specified in \_\_\_\_\_

**4. AUTHORITY TO PROCEED:** Vendor is authorized to begin performance of this contract upon receipt of a signed Purchase Order.

**5. QUANTITIES:** The quantities required under this Contract shall be identified in the RFP/RFB/Purchase Order.

**6. INSURANCE:** The apparent successful Vendor shall furnish proof of the insurance identified by a checkmark below and must include the Commission/Institution as an additional insured on each policy prior to Contract award. The insurance coverages identified below must be maintained throughout the life of this contract. Thirty (30) days prior to the expiration of the insurance policies, vendor shall provide the Commission/Institution with proof that the insurance mandated herein has been continued. Vendor must also provide the Commission/Institution with immediate notice of any changes in its insurance policies, including but not limited to, policy cancellation, policy reduction, or change in insurers. The apparent successful vendor shall also furnish proof of any additional insurance requirements contained in the specifications prior to Contract award.

Vendor must maintain:

☒ **Commercial General Liability/Errors and Omissions Insurance** in at least an amount of: \$1,000,000.00 per occurrence.

☐ **Automobile Liability Insurance** in at least an amount of: \_\_\_\_\_ per occurrence.

[ ] **Cyber Liability Insurance** in an amount of: \_\_\_\_\_per occurrence.

[ ] **Builders Risk Insurance** in an amount equal to 100% of the amount of the Contract.

**7. WORKERS' COMPENSATION INSURANCE:** Vendor shall comply with laws relating to workers compensation, shall maintain workers' compensation insurance when required, and shall furnish proof of workers' compensation insurance upon request.

**8. ACCEPTANCE:** Vendor's signature on its bid, or on the certification and signature page, constitutes an offer to the Commission/Institution that cannot be unilaterally withdrawn, signifies that the product or service proposed by vendor meets the mandatory requirements contained in the RFP/RFB for that product or service, unless otherwise indicated, and signifies acceptance of the terms and conditions contained in the RFP/RFB unless otherwise indicated.

**9. PRICING:** The pricing set forth herein is firm for the life of the Contract, unless specified elsewhere within this RFP/RFB/Contract by the Commission/Council/Institution. A vendor may request the inclusion of price adjustment provisions in its bid, but final approval of any price adjustments will be made by the Commission/Institution. Vendor must extend any publicly advertised sale price to the State and invoice at the lower of the contract price or the publicly advertised sale price.

**10. PAYMENT IN ARREARS:** Payments for goods/services will be made in arrears only upon receipt of a proper invoice, detailing the goods/services provided or receipt of the goods/services, whichever is later. Notwithstanding the foregoing, payments for software maintenance, licenses, or subscriptions may be paid annually in advance.

**11. PAYMENT METHODS:** Vendor must accept payment by electronic funds transfer and/or P-Card. (The State of West Virginia's Purchasing Card program, administered under contract by a banking institution, processes payment for goods and services through state designated credit cards.)

**12. TAXES:** The Vendor shall pay any applicable sales, use, personal property or any other taxes arising out of this Contract and the transactions contemplated thereby. The State of West Virginia is exempt from federal and state taxes and will not pay or reimburse such taxes.

**13. ADDITIONAL FEES:** Vendor is not permitted to charge additional fees or assess additional charges that were not expressly provided for in the RFP/RFB.

**14. FUNDING:** This Contract shall continue for the term stated herein, contingent upon funds being appropriated by the Legislature or otherwise being made available. In the event funds are not appropriated or otherwise made available, this Contract becomes void and of no effect beginning on July 1 of the fiscal year for which funding has not been appropriated or otherwise made available. If that occurs, the Commission/Institution may notify the vendor that an alternative source of funding has been obtained and thereby avoid the automatic termination. Non-appropriation or non-funding shall not be considered an event of default.

**15. CANCELLATION:** The Commission/Institution reserves the right to cancel this Contract

immediately upon written notice to the vendor if the materials or workmanship supplied do not conform to the specifications contained in the Contract.

**16. APPLICABLE LAW:** This Contract is governed by and interpreted under West Virginia law without giving effect to its choice of law principles. Any information provided in specification manuals, or any other source, verbal or written, which contradicts or violates the West Virginia Constitution or West Virginia Code, is void and of no effect.

**17. COMPLIANCE WITH LAWS:** Vendor or approved Subcontractor shall comply with all applicable federal, state, and local laws, regulations, and ordinances. By submitting a bid, vendor acknowledges that it has reviewed, understands, and will comply with all applicable laws, regulations, and ordinances.

**18. ARBITRATION:** Any references made to arbitration contained in this Contract, vendor's bid, or in any American Institute of Architects documents pertaining to this Contract are hereby deleted, void, and of no effect.

**19. MODIFICATIONS:** Any change to existing contracts that adds work or changes contract cost, and were not included in the original contract, must be approved by the Commission/Institution and the Attorney General's Office (as to form) prior to the implementation of the change or commencement of work affected by the change.

**20. WAIVER:** The failure of either party to insist upon a strict performance of any of the terms or provision of this Contract, or to exercise any option, right, or remedy herein contained, shall not be construed as a waiver or a relinquishment for the future of such term, provision, option, right, or remedy, but the same shall continue in full force and effect. Any waiver must be expressly stated in writing and signed by the waiving party.

**21. SUBSEQUENT FORMS:** The terms and conditions contained in this Contract shall supersede any and all subsequent terms and conditions which may appear on any form documents submitted by vendor to the Commission/Institution such as price lists, order forms, invoices, sales agreements, or maintenance agreements, and includes internet websites or other electronic documents. Acceptance or use of vendor's forms does not constitute acceptance of the terms and conditions contained thereon.

**22. ASSIGNMENT:** Neither this Contract nor any monies due, or to become due hereunder, may be assigned by the vendor without the express written consent of the Commission/Institution and the Attorney General's Office (as to form only).

**23. WARRANTY:** The Vendor expressly warrants that the goods and/or services covered by this Contract will: (a) conform to the specifications, drawings, samples, or other description furnished or specified by the Commission/Institution; (b) be merchantable and fit for the purpose intended; and (c) be free from defect in material and workmanship.

**24. STATE EMPLOYEES:** State employees (including Commission/Institution employees) are not permitted to utilize this Contract for personal use and the vendor is prohibited from permitting or facilitating the same.

**25. PRIVACY, SECURITY, AND CONFIDENTIALITY:** The Vendor agrees that it will not disclose to anyone, directly or indirectly, any such personally identifiable information or other confidential information gained from the Commission/Institution, unless the individual who is the subject of the information consents to the disclosure in writing or the disclosure is made pursuant to the Commission/Institution's policies, procedures, and rules.

**26. LICENSING:** Vendor must be licensed and in good standing in accordance with any and all state and local laws and requirements by any state or local agency of West Virginia, including, but not limited to, the West Virginia Secretary of State's Office, the West Virginia Tax Department, West Virginia Insurance Commission, or any other state agency or political subdivision. Upon request, the vendor must provide all necessary releases to obtain information to enable the Commission/Institution to verify that the vendor is licensed and in good standing with the above entities.

**SUBCONTRACTOR COMPLIANCE:** Vendor shall notify all subcontractors providing commodities or services related to this Contract that as subcontractors, they too are required to be licensed, in good standing, and up to date on all state and local obligations as described in this section. Notification under this provision must occur prior to the performance of any work under the contract by the subcontractor.

**27. ANTITRUST:** In submitting a bid to, signing a contract with, or accepting a Purchase Order with the Commission or any Institution of the State of West Virginia, the vendor agrees to convey, sell, assign, or transfer to the institution all rights, title, and interest in and to all causes of action it may now or hereafter acquire under the antitrust laws of the United States and the State of West Virginia for price fixing and/or unreasonable restraints of trade relating to the particular commodities or services purchased or acquired by the Commission/Institution. Such assignment shall be made and become effective at the time the Commission/Institution tenders the initial payment to vendor.

**28. VENDOR CERTIFICATIONS:** By signing its bid or entering into this Contract, vendor certifies (1) that its bid or offer was made without prior understanding, agreement, or connection with any corporation, firm, limited liability company, partnership, person or entity submitting a bid or offer for the same material, supplies, equipment or services; (2) that its bid or offer is in all respects fair and without collusion or fraud; (3) that this Contract is accepted or entered into without any prior understanding, agreement, or connection to any other entity that could be considered a violation of law; and (4) that it has reviewed this RFP/RFB in its entirety; understands the requirements, terms and conditions, and other information contained herein.

Vendor's signature on its bid or offer also affirms that neither it nor its representatives have any interest, nor shall acquire any interest, direct or indirect, which would compromise the performance of its services hereunder. Any such interests shall be promptly presented in detail to the Commission/Institution. The individual signing this bid or offer on behalf of the vendor certifies that he or she is authorized by the vendor to execute this bid or offer, or any documents related thereto on vendor's behalf; and that he or she is authorized to bind the vendor in a contractual relationship.



**29. VENDOR RELATIONSHIP:** The relationship of the vendor to the Commission/Institution shall be that of an independent contractor and no principal-agent relationship or employer-employee relationship is contemplated or created by this Contract. The vendor as an independent contractor is solely liable for the acts and omissions of its employees and agents. Vendor shall be responsible for selecting, supervising, and compensating any and all individuals employed pursuant to the terms of this RFP/RFB and resulting contract. Neither the vendor, nor any employees or subcontractors of the vendor, shall be deemed to be employees of the State for any purpose whatsoever. Vendor shall be exclusively responsible for payment of employees and contractors for all wages and salaries, taxes, withholding payments, penalties, fees, fringe benefits, professional liability insurance premiums, contributions to insurance and pension, or other deferred compensation plans, including but not limited to, Workers' Compensation and Social Security obligations, licensing fees, etc. and the filing of all necessary documents, forms, and returns pertinent to all of the foregoing.

Vendor shall hold harmless the Commission/Institution and shall provide the State and Commission/Institution with a defense against any and all claims including, but not limited to, the foregoing payments, withholdings, contributions, taxes, Social Security taxes, and employer income tax returns.

**30. INDEMNIFICATION:** The Vendor agrees to indemnify, defend, and hold harmless the State and the Commission/Institution, their officers, and employees from and against: (1) Any claims or losses for services rendered by any subcontractor, person, or firm performing or supplying services, materials, or supplies in connection with the performance of the Contract; (2) Any claims or losses resulting to any person or entity injured or damaged by the vendor, its officers, employees, or subcontractors by the publication, translation, reproduction, delivery, performance, use, or disposition of any data used under the Contract in a manner not authorized by the Contract, or by Federal or State statutes or regulations; and (3) Any failure of the vendor, its officers, employees, or subcontractors to observe State and Federal laws including, but not limited to, labor and wage and hour laws.

**31. PURCHASING AFFIDAVIT:** In accordance with West Virginia Code §5-22-1(i), the State is prohibited from awarding a contract to any bidder that owes a debt to the State or a political subdivision of the State, Vendors are required to sign, notarize, and submit the Purchasing Affidavit to the Commission/Institution affirming under oath that it is not in default on any monetary obligation owed to the state or a political subdivision of the state.

**32. CONFLICT OF INTEREST:** Vendor, its officers, members, or employees, shall not presently have or acquire an interest, direct or indirect, which would conflict with or compromise the performance of its obligations hereunder. Vendor shall periodically inquire of its officers, members, and employees to ensure that a conflict of interest does not arise. Any conflict of interest discovered shall be promptly presented in detail to the Commission/Institution.

**33. BACKGROUND CHECK:** In accordance with W. Va. Code §15-2D-3, the State reserves the right to prohibit a service provider's employees from accessing sensitive or critical information or to be present at the Commission/Institution based upon results addressed from a criminal background check.

**34. INTERESTED PARTY SUPPLEMENTAL DISCLOSURE:** W. Va. Code § 6D-1-2 requires that for contracts with an actual or estimated value of at least \$100,000.00, the vendor must submit to the Commission/Institution a supplemental disclosure of interested parties reflecting any new or differing interested parties to the contract, which were not included in the original pre- award interested party disclosure, within 30 days following the completion or termination of the contract. A copy of that form is included with this RFP/RFB or can be obtained from the WV Ethics Commission. This requirement does not apply to publicly traded companies listed on a national or international stock exchange. A more detailed definition of interested parties can be obtained from the form referenced above.

**35. PROHIBITION AGAINST USED OR REFURBISHED:** Unless expressly permitted in the RFP/RFB published by the Commission/Institution, vendor must provide new, unused commodities, and is prohibited from supplying used or refurbished commodities, in fulfilling its responsibilities under this Contract.

**36. VOID CONTRACT CLAUSES –** The Commission/Institution is requiring the vendor to follow the provisions of West Virginia Code §5A-3-62, which automatically voids certain contract clauses that violate State Law.

## GUIDELINES FOR VENDORS FOR BID SUBMISSIONS VIA EMAIL

**NOTE:** This document is specific to the competitive solicitation processes, where bid submissions must arrive at the closing location on time.

### 1. Purpose of These Guidelines

The Commission/Council may post opportunities that allow vendors to submit their bids / proposals / responses (known as submissions) electronically via email. This document is intended to assist vendors in understanding:

- the risks associated with submitting an emailed submission; and
- the pitfalls that should be avoided if emailing a submission.

**NOTE:** Vendors who deliver submissions via email do so at their own risk; the Commission/Council does not take any responsibility for any emailed submission that:

- does not arrive on time;
- is rejected; or
- contains corrupted electronic files.

### 2. Risks

Although emails are sent every day without incident, there are a number of risks that could occur and delay the receipt of an email. An email submission is deemed to have been received once it arrives in the Commission/Council's Electronic Mail System. Emailed submissions that arrive late will not be considered, regardless of the reason, and vendors will not have the option to resubmit after the closing date and time.

Following are some of the reasons that may delay an email, or cause an email to be rejected by the Commission/Council's email system:

- i. Delays can occur as an email moves from server to server between the sender and the recipient, meaning that the time when an email is received can be later – and sometimes considerably later – than the time when it was sent. The Commission/Council will consider the time that an email was received by the Commission/Council's email system as the official time for any emailed submission.
- ii. The Commission/Council's email system has technical and security limitations on the size and type of files that will be accepted. Emails containing attachments that exceed 30 MB cannot be accepted.
- iii. The Commission/Council's email system has protocols whereby an email may be investigated as potential spam or containing a virus / malware. Such protocols may result in an email being sent to the recipient's inbox late.
- iv. The Commission/Council's email system has protocols whereby an email may be

investigated as having Personally Identifiable Information (PII). An email determined by the system to contain PII or data of a similar appearance of PII will not be delivered.

- v. The Commission/Council's email system is designed to reject any email that is considered spam or that contains a virus or malware. On occasion, an email may be falsely flagged and rejected. Copies of rejected emails are not kept in the email system, and therefore no possibility exists to retrieve an emailed submission that has been rejected.
- vi. In addition, it is possible that one or more attachments to an email to become corrupted and therefore inaccessible to the Commission/Council's email system. Vendor will not have the option to resubmit after closing if the attachments cannot be opened. Further, the Commission/Council cannot open any submission prior to closing to confirm whether or not the files have been corrupted.

### **3. Vendor Guidance for Emailed Submissions**

1. Never assume that a solicitation allows for emailed submissions. Emails should only be used as a delivery mechanism when the opportunity expressly allows for it.
2. Never assume which email address is being used for submissions, when emailed submissions are permitted. Carefully read the instructions and ask questions well in advance of closing if the email address for submissions is not clear. Submissions that are emailed to any address other than the one expressly stated for the purpose may be rejected as missing a mandatory requirement of the solicitation.
3. Avoid using generic subject lines in the emailed submissions that do not clearly identify the solicitation name and / or number as well as the vendor organization name. The subject line of the email should be: BID FOR xxxxxxxxx DUE WEDNESDAY xxxxxxxxx AT 3:00PM. A sample email subject line for an open bid might be: BID FOR 21001 DUE WEDNESDAY, APRIL 7, 2021 AT 3:00PM.
4. Avoid multiple emails from the same vendor for the same opportunity wherever possible. If multiple emails cannot be avoided (e.g., the collective size of the emails exceeds the maximum size allowed), identify how many emails constitute the full submission and provide clear instructions on how to assemble the submission. Multiple submissions from the same vendor for the same opportunity may result in rejection if these instructions are unclear.
5. Vendors may update, change, or withdraw their submission at any time prior to the closing date and time. If emailing updates or changes, do not submit only the changes that then require collation with the previous submission. Instead, a complete revised package with clear instructions that it replaces the earlier submission should be sent. This will help to avoid any confusion as to what constitutes the complete submission.

6. Avoid emailing submissions in the last 60 minutes that the solicitation is open. Sufficient time should be left prior to closing to ensure that the email was received, and to resubmit before closing if a problem occurs.
7. Do not assume that the email has been received. If a confirmation email is not received shortly after sending the email, contact the named Contact on the solicitation to confirm whether or not their submission was received. In addition, send the emailed submission with a delivery receipt request. If unsure how to send an email with a delivery receipt request, contact the vendor's own system support personnel or search online for instructions specific to the vendor's email system (e.g., Outlook, Gmail, etc.)
8. If the confirmation email is not received, do not resubmit without first contacting the named Contact. Resending a submission should only occur once confirmation is received that the original email was not received, and enough time is left for receipt of the submission prior to the closing date and time.
9. Do not ignore any message from the Commission/Council regarding rejection of an emailed submission. If such a message is received prior to closing, contact the named Contact on the opportunity immediately.
10. If time permits prior to closing, possible remedies for a rejected or missing emailed submission include:
  - i. If the collective size of the emailed attachments exceeds 30 MB, resubmit it over multiple emails, clearly identify how many emails constitute the full submission and how to collate the files.
  - ii. If the emailed submission included zipped or executable files, unzip or remove the executable the files and resubmit over one or more emails (see previous bullet if the files collectively exceed 30 MB).
  - iii. Resend the submission from a different email account.
  - iv. If permitted in the opportunity, use an alternative method to deliver the submission (e.g., mailed or hand delivered).

Note: None of these remedies are applicable after the closing date and time.

**EXHIBIT D**  
**BID CERTIFICATION/SIGNATURE/ADDENDUM ACKNOWLEDGEMENT**  
**RFP# 25229 - MARKETING SERVICES**

**1. DESIGNATED CONTACT:** Vendor appoints the individual identified as the Contract Administrator and the initial point of contact for matters relating to this Contract.

\_\_\_\_\_  
(Name, Title)

\_\_\_\_\_  
(Printed Name and Title)

\_\_\_\_\_  
(Address)

\_\_\_\_\_  
(Phone Number)

\_\_\_\_\_  
(email address)

**2. CERTIFICATION AND SIGNATURE:** By signing below, or submitting documentation through e-mail, I certify that: I have reviewed this RFP/RFB in its entirety; that I understand the requirements, terms and conditions, and other information contained herein; that this bid, offer or proposal constitutes an offer to the Commission/Institution that cannot be unilaterally withdrawn; that the product or service proposed meets the mandatory requirements contained in the RFP/RFB for that product or service, unless otherwise stated herein; that the vendor accepts the terms and conditions contained in the RFP/RFB, unless otherwise stated herein; that I am submitting this bid, offer or proposal for review and consideration; that I am authorized by the vendor to execute and submit this bid, offer, or proposal, or any documents related thereto on vendor's behalf; that I am authorized to bind the vendor in a contractual relationship; and that to the best of my knowledge, the vendor has properly registered with any State agency that may require registration.

*By signing below, I further certify that I understand the Commission/Institution is requiring the vendor to follow the provisions of WV State Code 5A-3-62 which automatically voids certain contract clauses that violate State law.*

\_\_\_\_\_  
(Company)

\_\_\_\_\_  
(Authorized Signature) (Representative Name, Title)

\_\_\_\_\_  
(Printed Name and Title of Authorized Representative)

\_\_\_\_\_  
(Date)

\_\_\_\_\_  
(Phone Number)

## EXHIBIT E

### ADDENDUM ACKNOWLEDGEMENT FORM REQUEST FOR PROPOSALS/REQUEST FOR BIDS NO.: 25229

Instructions: Please acknowledge receipt of all addenda issued with this RFP/RFB by completing this addendum acknowledgment form. Check the box next to each addendum received and sign below. Failure to acknowledge addenda may result in bid disqualification.

Acknowledgment: I hereby acknowledge receipt of the following addenda and have made the necessary revisions to my proposal, plans and/or specification, etc.

Addendum Numbers Received:

*(Check the box next to each addendum received)*

☐ Addendum No. 1

☐ Addendum No. 2

☐ Addendum No. 3

☐ Addendum No. 4

☐ Addendum No. 5

☐ Addendum No. 6

☐ Addendum No. 7

☐ Addendum No. 8

☐ Addendum No. 9

☐ Addendum No. 10

I understand that failure to confirm the receipt of addenda may be cause for rejection of this bid. I further understand that any verbal representation made or assumed to be made during any oral discussion held between vendor's representatives and any Commission/Institution personnel is not binding. Only the information issued in writing and added to the specifications by an official addendum is binding.

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Company

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Authorized Signature

---

Date

NOTE: This addendum acknowledgement should be submitted with the bid to expedite document processing.

# EXHIBIT F

## RFP 25229 MANDATORY REQUIREMENTS CHECKLIST

**Note: Requirements have been abbreviated for use in this checklist. Full language of the requirements is contained in the RFP document.**

### MANDATORY BID REQUIREMENTS

REQUIREMENT	PAGE REFERENCE	MET	NOT MET
Professional capability (Section 4)			
Experience (Section 4)			
Similar services (Section 4)			
Comply with time schedules set by the Commission/Council (Section 4)			
Ownership of all artwork, etc. (Section 3)			
Vendor payment for services in advance and invoices to the Commission/Council showing proof of payment (Section 3)			
Travel costs must be included in pricing (Section 3)			
Provide cost estimates prior to work being performed (Section 3)			
Mark-up fee no greater than 3%. (Section 3)			
Costs provided in a separate envelope			



# EXHIBIT G

## RFP 25229 Desirable Requirements Checklist

**Note: Requirements have been abbreviated for use in this checklist. Full language of the requirements is contained in the RFP document.**

### Creative Services Desirable Requirements

DESIRABLE CREATIVE SERVICE REQUIREMENT (Section 3)	PAGE REFERENCE
Media Services	
Media Planning	
Negotiation and Placement	
Placement Verification	
Post-Buy Analysis	
Digital Services	

### Advertising and Marketing Services Desirable Requirements

DESIRABLE ADVERTISING AND MARKETING REQUIREMENT (Section 4)	PAGE REFERENCE
Written description outlining vendor experience and how vendor will provide services for sample list.	
Describe a complete campaign vendor has completed within the last three years.	

## EXHIBIT H

### **RFP 25229 COST SHEET**

*(to be submitted in a separate file)*

Vendor Name: \_\_\_\_\_

For evaluation purposes, price out the Cost of Services Bid as discussed below. There is no guarantee that the Commission and/or Council will use a set amount of services, or that the Commission and/or Council will use all of the services. This scenario is for Evaluation Purposes ONLY.

Amounts quoted must be all-inclusive. No additional amounts, such as for travel or overhead, will be paid to the vendor.

Sample Breakdown of Potential Services:

Planning/Research Analysis: 5%  
Content Creation/Copy Writing: 15%  
Design Work: 15%  
Media Planning and Buying: 25%  
Social Media Planning and Execution: 20%  
Public Relations/Events: 10%  
Client Consultation: 5%  
Campaign Evaluation: 5%

Vendor must provide hourly rates by employee classification and identify the mark-up rate that will be used:

Senior Ad Executive \$ \_\_\_\_\_  
Ad Executive \$ \_\_\_\_\_  
Graphic Artist \$ \_\_\_\_\_  
Administrative \$ \_\_\_\_\_  
Mark-up Rate: \_\_\_\_\_ %

Vendor should determine its own fair rate and quote the price it will charge. This hourly rate will be the maximum rate allowed for conducting work for the Commission and/or Council under a contract resulting from this RFP.

### **Total Cost of Services Bid**

Insert the amounts you bid for the hourly rate, and then perform the calculation shown.

- |    |  |            |
|----|--|------------|
| 1. | 500 Senior Ad Executive Hours x \$ _____ (hourly rate bid) | = \$ _____ |
| 2. | 800 Ad Executive Hours x \$ _____ (hourly rate bid)        | = \$ _____ |
| 3. | 800 Graphic Artist Hours x \$ _____ (hourly rate bid)      | = \$ _____ |
| 4. | 300 Administrative Hours x \$ _____ (hourly rate bid)      | = \$ _____ |
| 5. | Total Cost of Services (sum of lines 1-4)                  | = \$ _____ |