



REQUEST FOR PROPOSALS NO. 18-150
Marketing and Customer Engagement Consulting Services

Instructions to Proposers:

All spaces below and all offer documents as outlined in are to be filled in with signatures where indicated. Failure to sign may render your proposal invalid.

PROPOSAL OF:

Name of Bidder: _____

Address: _____

City, State and Zip Code: _____

SUBMIT PROPOSAL TO:

STATE ROAD AND TOLLWAY AUTHORITY
Leanna Jordan Pierre, Procurement Manager/Legal Associate
245 Peachtree Center Avenue, Suite 2200
Atlanta, Georgia 30303

Proposals Due and Open: **June 12, 2018, 2:00 PM, Local Time (Atlanta, GA)**

Schedule of Events

Release RFP	May 10, 2018
Pre-Proposal Conference	May 16, 2018, 11:30 AM EST
Deadline for Vendor Written Questions (Submit questions by email to lpierre@srtga.gov)	May 18, 2018
Responses to Written Questions	May 30, 2018
Proposal Submission Deadline	June 12, 2018, 2PM EST
Oral Presentations (Optional and by invitation only)	June 22 and June 25, 2018*
Notice of Intent to Award	June 26, 2018*
Notice of Contract Award	July 9, 2018*

*Subject to change without a formal addendum to the RFP.

All questions should be submitted by email to lpierre@srtga.gov. Questions must be submitted no later than the deadline specified in the above Schedule of Events. Answers to written questions received will be available at the State Road and Tollway Authority (SRTA) website at <http://www.srtga.gov>. Answers are provided for informational purposes only and will not be considered binding unless incorporated by addendum to this RFP. All questions and answers will be posted to the SRTA's website where the RFP document is located. Proposers are reminded and encouraged to check this website daily for any changes to the RFP as well as to check this website for Notice of Contract Award. Posting of Notice of Award shall constitute official public notification.

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PART 1 – SOLICITATION, OFFER, AND AWARD

1. Information for Proposers

1.1 Purpose of Procurement

The purpose of this solicitation is to request proposals from qualified companies to provide marketing and customer engagement services for the State Road and Tollway Authority. The scope of work consists of furnishing all labor, machinery, tools, means of transportation, supplies, equipment, materials, safety equipment, services, and incidentals to provide complete marketing and customer engagement consulting services as provided herein. The Scope of Services begins on page 24 of this PDF.

The services to be performed shall generally fall into the following National American Industry Classification System (NAICS) commodity codes:

- 541613 – Marketing Consulting Services

All respondents to this RFP are subject to the instructions communicated in this document and are cautioned to review the entire RFP and carefully follow the instructions herein.

Proposals will be accepted until 2:00PM (EST), **June 12, 2018**. Instructions for requesting a copy of the RFP document can be found on the SRTA website at <http://www.srta.ga.gov/doing-business-with-us/>.

1.2 Type and Term of Contract

SRTA shall negotiate and enter into a fixed price type contract with the selected Contractor. The contract to be awarded by SRTA shall be for a period of three (3) years. All extensions or renewals shall be made in writing and executed by both parties prior to the contract expiration date.

1.3 Solicitation Schedule

Release RFP	May 10, 2018
Pre-Proposal Conference	May 16, 2018, 11:30 AM EST
Deadline for Vendor Written Questions (Submit questions by email to lpierre@srta.ga.gov)	May 18, 2018, 2PM EST
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Proposal Submission Deadline	June 12, 2018, 2PM EST
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Notice of Intent to Award	June 26, 2018*
Notice of Contract Award	July 9, 2018*

* Tentative and subject to change with no formal modification to the RFP document. Changes to all other dates require the issuance of a formal addendum to the RFP document.

1.4 *Restrictions on Communications with SRTA during Solicitation, Offer, and Award Period*

From the date of issuance of this solicitation through the date of contract award by SRTA, all official communications to and from SRTA regarding this solicitation will be transmitted in writing (defined as being sent or received via letter or email on official firm/agency letterhead or by electronic mail).

All vendor communications concerning this solicitation should be directed to the SRTA Procurement Manager. **Unauthorized contact regarding this solicitation with other SRTA staff, or SRTA Board members, members may result in disqualification.**

Any oral communications will be considered unofficial and non-binding on SRTA. Proposers should only rely on written statements issued by the SRTA Procurement Manager.

1.5 *SRTA Contact Information*

The mailing and delivery address for all correspondence and/or deliveries related to and during this solicitation for SRTA shall be directed as follows:

State Road and Tollway Authority
245 Peachtree Center Avenue NE, Suite 2200
Atlanta, GA 30303

All inquiries, offers, submissions, and/or other correspondence regarding this solicitation (excluding protests submitted in accordance with Part 1, Section 2.10 below) must be directed in writing to:

Leanna Jordan Pierre, Procurement & Contracts Manager
State Road and Tollway Authority
245 Peachtree Center Avenue NE, Suite 2200
Atlanta, GA 30303
E-mail: lpierre@srta.ga.gov

1.6 *Pre-Proposal Conference*

All prospective proposers are invited to attend the pre-proposal conference, which will be held on May 16, 2018 at 11:30am EST at the SRTA main office located at 245 Peachtree Center Avenue NE, Suite 2200 Atlanta, GA 30303. While attendance is not mandatory, it is highly encouraged.

2. Solicitation Terms and Conditions / Instructions to Proposers

2.1 *Deadline for Submission of Proposals / Late Proposals*

Proposals submitted in response to SRTA Solicitation No. 18-150 must be received by SRTA no later than 2:00 p.m. (EST) on June 12, 2018 to ensure that they are evaluated for contract award by the Evaluation Committee for this procurement. Proposals received after the submission deadline will not be evaluated.

2.2 *Format of Proposals*

Five (5) total paper copies of each proposal, inclusive of one (1) original, as well as one (1) electronic copy on USB drive must be submitted to the SRTA Procurement Manager for the RFP to be eligible for evaluation and consideration for contract award. **Pricing must be submitted in a separate sealed envelope.**

The electronic copy, whether submitted on a USB drive, must be submitted in Portable Document Format (PDF), Microsoft Word, and/or Microsoft Excel formats. The USB drive shall contain electronic file copies of all complete, signed Offer Documents that are submitted in paper copy format.

All proposals must be prepared and submitted in accordance with the proposal format and content requirements specified in Part 1, Section 3 below. Proposals must be typed. The included required forms may be completed by using the free Adobe Reader software available at <http://get.adobe.com/reader/>.

The "original" paper copy of the RFP must be unbound. All paper copies must be clearly marked as being either "Original" or "Copy" as applicable.

All RFPs must be prepared and submitted in accordance with the RFP document format and content requirements specified in Section 3 below. RFPs must be typed in English and all pricing must be provided in US dollars. As a condition of submission responsiveness, all Offer Documents that require the signature of Proposer must be signed.

Any contract award made as a result of this solicitation shall bind the Proposer to all of the terms, conditions and specifications set forth in this RFP.

2.3 *Location for Submission of Proposals / Methods of Delivery*

Proposals must be submitted exclusively to Leanna Jordan Pierre, Procurement Manager, at the address noted in Section 1.5. It is the sole responsibility of the Proposer to ensure that its proposal is successfully delivered to SRTA by the specified date and time. SRTA is not responsible for late or lost deliveries of proposals submitted via electronic mail.

Proposals that are submitted by hand delivery or delivery by U.S. Postal Service or private courier/delivery service must be delivered to the SRTA administrative office located at 245 Peachtree Center, Suite 2200, Atlanta, GA 30303. SRTA's physical address and mailing address are the same.

All envelopes, packages, and/or boxes (including all envelopes, packages, and/or boxes submitted within a larger envelope, package, or box) containing a proposal on USB drive must be clearly marked with the following identifier on the outside of the envelope, package or box:

"Proposal in response to SRTA Solicitation No. 18-150:
RFP for Customer Engagement and Communications – June 12, 2018, 2:00 p.m.
(EST)
ATTN: Leanna Jordan Pierre, Procurement Manager
To be opened by addressee only."

Failure to clearly mark all envelopes, packages, and/or boxes as specified may result in the proposal being discovered and/or opened late. SRTA is not responsible for proposals

discovered and/or opened late due to Proposer's failure to mark the proposal as specified. It is the sole responsibility of the Proposer to ensure that its proposal is successfully delivered to SRTA by the specified date and time. SRTA is not responsible for late or lost deliveries by the U.S. Postal Service or private courier/delivery services.

2.4 Questions

Questions regarding the RFP must be submitted to SRTA in writing (defined as being sent or received via letter on official firm/agency letterhead or by electronic mail) by 2:00 p.m. (EST) on May 18, 2018. Written questions must be submitted to the attention of Leanna Jordan Pierre, Procurement Manager in accordance with Section 1.5 above. **Inquiries must be in the form of questions.** There is no prescribed form for the submission of written questions. SRTA may not respond to written questions received after the submission deadline.

SRTA staff will review and evaluate all written questions that are received by the submission deadline and will post responses to all questions to both the Georgia Procurement Registry web site at http://ssl.doas.state.ga.us/PRSapp/PR_index.jsp and SRTA web site at <http://www.srta.ga.gov/doing-business-with-us/> not later than 5:00 p.m. (ET) May 30, 2018. It is the sole responsibility of the Proposer to make itself aware of SRTA's responses to written questions. Responses to questions are provided as information only and do not in any way alter the contents of the Solicitation inclusive of the Scope of Services and the remainder of the RFP documents. Revisions to the Solicitation shall be made only via formally issued Amendments (i.e. Addenda). Only such written addenda shall constitute revisions to the Solicitation that are binding upon SRTA.

2.5 Amendments to Solicitation (Addenda) / Postponement of Proposal Submission Deadline

SRTA reserves the right to revise or amend the RFP up to the time set for the submission of proposals. Such revisions and amendments, if any, shall be announced by written addenda to the RFP. If an addendum significantly changes the RFP, the date set for the submission of proposals may be postponed by such number of days as in the opinion of SRTA shall enable potential Proposers to revise their proposals. In any case, the proposal submission deadline shall be at least five business days after the last addendum, and the addendum shall include an announcement of the new date, if applicable, for the submission of proposals.

Upon issuance, addenda will be considered part of the RFP and will prevail over inconsistent or conflicting provisions contained in the original RFP. Copies of all addenda will be made available on both the Georgia Procurement Registry web site at http://ssl.doas.state.ga.us/PRSapp/PR_index.jsp and the SRTA web site at <http://www.srta.ga.gov/doing-business-with-us/>. All potential Proposers that have previously requested and received a copy of the RFP document will be notified via e-mail that an addendum is available. This process will be repeated each time an addendum is made available by SRTA.

SRTA will not be responsible for a potential Proposer failing to receive notification of the availability of addenda. It is the sole responsibility of each potential Proposer to check the SRTA and Georgia Procurement Registry websites for addenda.

Proposers shall acknowledge receipt of all addenda by completing and submitting Offer Document #3 (Acknowledgement of Addenda), included in this RFP, as part of its proposal. As with other required documentation, proposals that fail to reference receipt of addenda by

inclusion of Offer Document #3 (Acknowledgement of Addenda) may be excluded from consideration for a contract award.

2.6 *Modification of Proposals*

Except at the written request of SRTA, no proposal may be modified after the deadline for proposal submission identified in Section 2.1.

2.7 *Single Response to Solicitation*

If only one proposal is received in response to this RFP, a detailed cost analysis of the single proposal may be requested of the single Proposer. A cost analysis, evaluation, and/or audit of the proposal may also be performed by SRTA in order to determine if the proposal price is fair and reasonable. If SRTA determines that a cost analysis is required, the single Proposer must be prepared to provide, upon request, detailed summaries of estimated costs (i.e., labor, equipment, supplies, overhead costs, profit, etc.) and documentation supporting all cost elements.

2.8 *Confidential / Proprietary Information*

Any and all materials submitted in response to this RFP are subject to public inspection, pursuant to the provisions of Georgia's Open Records Act upon completion of the RFP process. SRTA's receipt, review, evaluation or any other act or omission concerning any such information shall not be considered to create an acceptance of any obligation or duty for SRTA to prevent the disclosure of any such information except as required by the Open Record Act. Proposers that decide to submit information they believe should be exempt from disclosure under the Open Records Act shall: (i) clearly mark each page containing such information as confidential, proprietary or exempt, (ii) shall include such information in a different color from the rest of the proposal text, (iii) shall state the legal basis for the exemption with supporting citations to the Georgia Code, and (iv) for records containing trade secrets, Proposers who wish to keep such record confidential shall also submit and attach to the records an affidavit affirmatively declaring that specific information in the records constitute trade secrets pursuant to Article 27 of Chapter 1 of Title 10 of the Georgia Code.

Pursuant to Georgia Law, if the information is requested under the Open Records Act, SRTA shall make a final determination if any exemption actually exists for SRTA to deny the request and prevent disclosure. SRTA will withhold such information from public disclosure under the Open Records Act only if SRTA determines, in its sole discretions, that there is a legal basis to do so.

All material submitted regarding the RFP becomes the property of SRTA.

Any activity pursuant to this RFP by any Proposer is governed by all applicable laws, including without limitation, State and Federal antitrust laws.

2.9 *Reserved Rights*

SRTA reserves the right to reject any and all proposals or any portion of a specific proposal for any reason. Issuance of this RFP and receipt of proposals does not commit SRTA to award a contract.

SRTA has the sole right to select the successful proposal(s) for contract award(s); to reject any proposal as unsatisfactory or non-responsive due to non-conformance with the requirements of this RFP; to cancel the solicitation and to advertise for new proposals; to award a contract(s) to other than the Proposer submitting the lowest cost proposal; or not to award a contract as a result of this RFP.

SRTA reserves the right to accept any proposal deemed to be in the best interest of the SRTA and to waive any irregularities in any proposal that does not prejudice other Proposers. SRTA further reserves the right to negotiate with the Proposer(s) whose proposal(s) is considered by the SRTA, to be most advantageous to the SRTA and does not unduly place SRTA at risk from a legal perspective.

SRTA further reserves the right to retain all proposals submitted and to use any ideas or concepts in any proposal for any purpose regardless of whether that proposal is selected for contract award.

Proposals shall be submitted to SRTA on the most favorable of terms possible from the standpoint of cost, quality, and technical capability. No Proposer shall have any cause of action against SRTA or the SRTA arising out of the methods by which proposals are evaluated.

2.10 Protest Procedures

2.10.1 Filing

- a. An Interested Party is the only part that may file a Protest under this Procedure. An Interested Party shall be defined as any party with a direct economic interest in providing the goods or services sought in the procurement that is the subject of the protest or only those proposers/bidders who actually filed a timely and responsive proposal/bid that complies with the requirement of the procurement that is the subject of the protest.
- b. All protests, and any subsequent pleadings, correspondence or other communications with respect to such protest must be filed, in writing, with a signed original and three (3) copies delivered to the SRTA Procurement and Contracts Manager on a business day, which shall not include observed State holidays, between the hours of 9:00 a.m. and 5:00 p.m. local time, at the same address shown for submitting the proposal/bid that is the subject of the protest. The filing or copying of any pleadings, correspondence or other communications with respect to a protest with any other SRTA official other than the SRTA Procurement and Contracts Manager shall subject the protest to summary dismissal in accordance with this section.
- c. All protests must be received by the SRTA Procurement and Contracts Manager no later than 5:00 p.m. local time on the last day that such protest may be filed with respect to a particular proposal/bid in accordance with the protest policy as outlined below. Protests may be filed only by hand delivery, U.S. mail or commercial carrier. Protests received by email or fax will not be considered.
- d. Failure to timely file the protest or any supporting documents that are required to be filed as a part of the protest will result in the protest being deemed untimely and subject to summary dismissal. Protests will be date and time stamped by SRTA, and timeliness will be determined solely by SRTA with reference to such date/time stamp.

- e. Upon receipt of a protest, the SRTA Procurement and Contracts Manager shall review the protest for compliance with the procedures and requirements as set forth in this section and the applicable proposal/bid documents. Protests that fail to comply with any mandatory item in this section shall be subject to summary dismissal in accordance with this section.
 - i. Upon receipt of a protest, the SRTA Procurement and Contracts Manager shall review the protest for compliance with the procedures and requirements as set forth in this section and the applicable proposal/bid documents. Protests that fail to comply with any mandatory item in this section shall be subject to summary dismissal in accordance with Section 2.10.5-Summary Dismissal below.
 - ii. Upon receipt of any subsequent pleadings, correspondence or other communications with respect to a Protest that are permitted by this Procedure or requested by the Protest Decisionmaker from the Protestor, the SRTA Procurement and Contracts Manager will forward such materials as expeditiously as possible to the appropriate Protest Decisionmaker for the Protest.

2.10.2 Form of the Protest

- a. All protests must be filed in an envelope labeled "PROTEST," which identifies the protestor's name and address, the name of the SRTA Procurement and Contracts Manager, and the SRTA solicitation number and title assigned to the solicitation or contract.
- b. Protests must be on the protestor's letterhead and shall not exceed ten (10) pages in length (including all attachments and exhibits thereto that contain any written pleadings or argument, but excluding supporting documentation as outlined in the following paragraph. Each page shall have print on only one side of the page with margins no smaller than one inch (1"). The font size shall be no smaller than Courier 10 characters per inch, 12 point (or equivalent).
- c. Any supporting documentation that is cited or specifically referenced in the protest, whether or not it is already in the possession of SRTA (except for copies of SRTA solicitation documents publicly posted and issued by SRTA) or protestor, must be filed simultaneously with the Protest, if such documentation is publicly available at the time of filing. Only supporting documentation that was not publicly available as of the deadline for filing said protest will be accepted as a subsequent filing or pleading from the protestor and will be handled in accordance with Section 2.10.1 (e)(i). All other subsequent pleadings, correspondence or other communications with respect to a protest that are submitted by the protestor, but not first requested by the SRTA Procurement and Contracts Manager pursuant to Section 2.10.7 will be handled in accordance with Section 2.10.1 (e)(ii).
- d. Each protest shall contain the following mandatory information:
 - (i) Protestor's name, address, telephone number, and email address.

- (ii) A signed and notarized affidavit of the protestor's chief executive officer or the protestor's legal counsel, given under oath and expressly stating that it is given under penalty or perjury, that the contents of the protest are true and correct and that the filing of the protest is authorized by the protestor's chief executive officer.
- (iii) The signature of the protestor's chief executive officer or the protestor's legal counsel, whichever is signing the Protest for or on behalf of the protestor, notarized separately from, and in addition to, the notarized affidavit under (insert reference).
- (iv) The specific title assigned by the SRTA to the procurement and to the specific solicitation document that is the subject of the Protest, and all associated SRTA solicitation or contract numbers, must be clearly shown on each page of the protest.
- (v) A specific detailed statement of all legal and factual grounds relied upon by the protestor in filing its protest. Any grounds not included in the protest that the protestor could have raised when the protest was filed will be deemed irrevocably waived and may not be part of, or grounds for, that or any subsequent protest or other legal action filed by protestor.
- (vi) Information in the form of signed affidavits or supporting documentation sufficient to show that the protestor qualifies as an interested party for the procurement with respect to which such protest is filed.
- (vii) Evidence that the filing of the protest is timely along with all supporting documentation.
- (viii) A specific statement of the form and nature of the relief requested by protestor.

The SRTA Compliance Manager will conduct a procedural compliance review to determine whether the protest fails to comply with the mandatory items in Section 2.10.2- Form of Protest, subsection (d). The protestor's failure to include in its protest all of the mandatory items specified in Section 2.10.2-Form of Protest, subsection (d) shall subject the protest to summary dismissal in accordance with Section 2.10.5-Summary Dismissal.

2.10.3 Time for Filing

a. Pre-Proposal/Pre-bid Protests

All protests concerning solicitation specifications, criteria and/or procedures shall be submitted to SRTA within ten (10) calendar of when the basis for protest is known or should have been known to the protestor (whichever is earlier), but in no event later than the proposal/bid submission deadline. Any protest by the protestor with respect to any matter or event first occurring on or before the proposal/bid response date, including any aspect of the procurement process or the solicitation documents issued or occurring prior thereto, must be made within the time frame set forth in herein or will be deemed irrevocably waived and may not be part of, or grounds for, any subsequent Protest or other legal action filed by Protestor. For purposes of this

protest filings, interested parties shall be deemed to have knowledge of the form and contents of any solicitation document at the time that such solicitation document is first posted to the Georgia Procurement Registry website or otherwise put on public notice in accordance with the written policies of the SRTA.

The SRTA Executive Director shall provide a written response to all protests not later than five (5) business days prior to the deadline for submission of bids/proposals. If the deadline for submission of bids/proposals is postponed by SRTA Executive Director as the result of a protest the postponement will be announced through an addendum to the solicitation.

The decision by SRTA Executive Director shall be the final agency decision on the matter but shall be subject to judicial review as set forth in O.C.G.A. §50-13-19, or review by FTA below.

b. *Pre-Award Protests*

With respect to protests made after the deadline for submission of bids/proposals but before contract award by SRTA, protests shall be limited to those protests alleging a violation of Federal or State law, a challenge to the bids/proposals evaluation and award process, SRTA's failure to have or follow its protest procedures or its failure to review a complaint or protest. Such protests shall be submitted in writing (defined as being sent or received via letter or facsimile on official firm/agency letterhead or by electronic mail) to SRTA Executive Director as specified below not later than five (5) business days after the Recommendation for Contract Award announcement by SRTA.

The SRTA Executive Director may, within his or her discretion, postpone the award of the contract, but in any case, shall provide a written response to all protests not later than three (3) business days prior to the date that SRTA shall announce the contract award.

The decision by SRTA Executive Director shall be the final agency decision on the matter but shall be subject to judicial review as set forth in O.C.G.A. §50-13-19 or review by FTA as specified below.

All protests must be directed in writing to:

SRTA Procurement and Contracts Manager
State Road and Tollway Authority
245 Peachtree Center Avenue, Suite 2200
Atlanta, GA 30303

c. *Protest Response*

The SRTA Executive Director shall issue written responses to all protests received by the required protest response dates. All protest responses shall be transmitted by first-class U.S. Postal Service to the address indicated in the protest letter.

For convenience, SRTA will also send a copy of the response to a protest to the Protester by facsimile and/or electronic mail if a facsimile number and/or electronic mail address are indicated in the protest letter. The protest response transmitted by U.S. Postal Service shall be the official SRTA response to the protest and SRTA will

not be responsible for the failure of the Protester to receive the protest response by either facsimile or electronic mail.

Protests not filed in accordance with the deadlines set forth in Section 2.10.3-Time for Filing shall be deemed untimely and subject to summary dismissal pursuant to Section 2.10.5-Summary Dismissal as noted below.

2.10.4 Protest Decisionmaker

- a. Except as specifically set forth in this paragraph and in Section 2.10.4 (b), all Protests shall be decided by the SRTA Procurement and Contracts Manager who is authorized by the Executive Director to resolve or rule on any Protest. The Procurement and Contract Manager's actions, decisions and orders in such capacity as Protest Decisionmaker shall be deemed to be on behalf of the Executive Director and effective as though taken by the Executive Director. If at the time of filing, SRTA does not have a Procurement and Contracts Manager then the Executive Director may designate, in his/her discretion, any other SRTA employee (other than the Executive Director, or the Protest Coordinator or Contracting Officer for the particular procurement that is the subject of the Protest) to serve as Protest Decisionmaker until a Procurement and Contracts Manager is appointed or on a case by case basis at any time after receipt of a Protest and prior to the appointment of a Third Party Hearing Officer with respect to such Protest under Section 2.10.4(b).
- b. At the sole and exclusive discretion of the Procurement and Contracts Manager exercised at any time prior to the issuance of a decision with respect to a Protest, the Procurement and Contracts Manager may request that the Executive Director appoint a Third-Party Hearing Officer to recommend a resolution or ruling on any Protest in accordance with Section 2.10.8-Protest Adjudication Procedures. Upon such appointment of a Third-Party Hearing Officer by the Executive Director, the Third-Party Hearing Officer's actions, decisions and orders in such capacity as Protest Decisionmaker shall be deemed to be on behalf of the Executive Director and effective as though taken by the Executive Director, subject, however, to Section 2.10.8-Protest Adjudication Procedures. Upon the request for and appointment of a Third-Party Hearing Officer with respect to a particular Protest, such appointment of a Third-Party Hearing Officer with respect to such Protest shall be irrevocable and the Procurement and Contracts Manager shall not thereafter be entitled to rule singly on the Protest.

2.10.5 Summary Dismissal

The SRTA Executive Director, may, in his/her sole discretion, summarily dismiss any protest failing to comply with any aspect of this procedure or any aspect of the applicable solicitation documents issued by the SRTA. Protester will be notified in writing by facsimile transmission or electronic means, with the original to follow by United States Mail, of the summary dismissal of its protest.

2.10.6 Time for Decision by Protest Decisionmaker

Protests that are not either summarily dismissed or withdrawn (or deemed withdrawn) shall be forwarded by the Protest Coordinator to the Protest Decisionmaker for a decision, as expeditiously as possible after the end of the Protest Coordinator's procedural compliance

review. The Protest Decisionmaker shall issue a decision as expeditiously as practical within Thirty (30) Business Days from the later to occur of:

1. The day the Protest is forwarded by the Protest Coordinator to the Protest Decisionmaker for a decision, or
2. The receipt of any requested information from the Contracting Officer, the Protestor or any other party who has relevant information that the Protest Decisionmaker deems necessary in order to render its decision on the Protest.

2.10.7 Protest Decisionmaker's Investigation

1. The Protest Decisionmaker may request or permit submission of additional statements or documentation from the Contracting Officer, as the Protest Decisionmaker deems necessary in its sole discretion.
2. The Protest Decisionmaker may make a reasonable investigation and is authorized to request any information or documentation it deems necessary in order to render a decision on the Protest.

2.10.8 Protest Adjudication Procedures

1. The Protest Decisionmaker, in its sole discretion, may issue written questions to the Protestor on any issue the Protest Decisionmaker deems necessary for its consideration of the Protest. Such written questions may be issued in lieu of or in addition to a hearing. Unless specifically required or permitted by this Procedure, or otherwise specifically requested by the Protest Decisionmaker in writing to the Protestor, the Protestor may not file any written pleading, motion or other written documentation with the Contracting Officer or the Protest Decisionmaker after Protestor's filing of the initial Protest.
2. The Protest Decisionmaker, in its sole discretion, either at the Protest Decisionmaker's own instance or upon the Protestor's prior written request submitted in accordance with Section 2.10.1 (b), may elect to conduct a hearing in connection with the Protest. Any requests for a hearing must include a brief statement demonstrating that the Protest Decisionmaker's decision will be aided by a hearing. In the event that the Protest Decisionmaker schedules a hearing, the notice of the hearing may set forth the scope of the hearing, including, but not limited to, the issues to be addressed, the length of hearing and whether documentary or testimonial evidence will be accepted. Alternatively, the Protest Decisionmaker may conduct a pre-hearing conference concerning the procedures to be followed at the hearing, what issues are under consideration and a list of witnesses who may testify. The issues and evidence considered by the Protest Decisionmaker are within the sole discretion of the Protest Decisionmaker.
3. Subject to Section 2.10.8(4), the Protest Decisionmaker may fashion any remedy the Protest Decisionmaker deems consistent with the procurement process and the Solicitation Documents, including without limitation,
 - i. Deny the Protest in whole or in part,
 - ii. Sustain the Protest in whole or in part, or

- iii. Subject to Section 2.10.8(4), order the Contracting Officer to take any measure consistent with the Protest Decisionmaker's remedy, including without limitation,
 - iv. Award the contract in accordance with the Contracting Officer's original decision,
 - v. Suspend Contract Award or other Solicitation Decision and reevaluate the Solicitation Responses,
 - vi. Cancel the procurement or solicitation,
 - vii. Amend the procurement, or
 - viii. Any other remedy the Protest Decisionmaker determines is necessary to protect or maintain the integrity of the SRTA's procurement process.
4. The decision of the Protest Decisionmaker shall be final; provided, however, that if a Third-Party Hearing Officer is the Protest Decisionmaker, the Third-Party Hearing Officer shall only be entitled to make a written recommendation to the Executive Director containing the Third-Party Hearing Officer's proposed ruling on the Protest.
- i. The Executive Director may:
 - a. Accept, modify or reject the Third-Party Hearing Officer's recommendation in whole or in part;
 - b. Return the matter to the Third-Party Hearing Officer with instruction; or
 - c. Make any other appropriate disposition.
 - ii. The Executive Director's decision shall be deemed the final decision of the Protest Decisionmaker.

2.10.9 Stay of Procurement During Protest

The SRTA Executive Director may order a stay in the opening of a proposals/bids received or of the contract performance if the Executive Director determines, in the Executive Director's sole discretion, that a stay is in the best interest of the SRTA, any affected Agency or the State of Georgia. Should the Executive Director not stay contract performance pending the resolution of any protest to an actual Contract Award, the contract may be awarded on a contingent basis, subject to revocation, revision or other adjustment or modification based on the final decision of the Executive Director in such Protest.

2.10.10 Costs

Neither the protestor, any interested party nor any other third party shall be entitled to recover any costs incurred in connection with the procurement process, the solicitation, the protest, and/or compliance or attempted compliance with this policy, including preparation costs or attorneys' fees.

2.10.11 Governing Law

The laws and regulations of the State of Georgia, without application of its conflicts of laws principles, shall govern any action brought pursuant to this Protest Procedure.

2.10.12 Judicial Review

Any further legal action by the Protestor upon the final decision by SRTA must be filed with the Superior Court of Fulton County and served on SRTA within the time prescribed by Georgia law. The final exhaustion of the procedures set forth in this Protest Procedure is a prerequisite to the commencement of any judicial review of a final decision issued by SRTA under this Protest Procedure.

2.10.13 Review of Protests by FTA

All protests involving contracts financed with federal assistance shall be disclosed to the FTA in accordance with FTA Circular 4220.1F or the most recent version of FTA Circular 4420.1 available at the time of issuance of the solicitation. Protesters shall exhaust all administrative remedies with SRTA prior to pursuing protests with FTA. FTA limits its reviews of protests to: a grantee's failure to have or follow its protest procedures; a grantee's failure to review a complaint or protest when presented an opportunity to do so; or violations of Federal law or regulation. Appeals to FTA must be received by the cognizant FTA regional or headquarters office within five (5) working days of the date the Protester has received actual or constructive notice of SRTA's final decision or within five (5) working days of the date the Protester has identified other grounds for appeal to FTA.

2.11 *Minority Business Participation*

The requirements of 49 CFR Part 26, Regulations of the U.S. Department of Transportation, apply to this contract. It is SRTA's policy to practice nondiscrimination based on race, color, sex, or national origin in the award or performance of this contract. All companies qualifying under this solicitation are encouraged to submit price quotes. Award of this contract will be conditioned upon satisfying the requirements of this solicitation. These requirements apply to all companies, including those who qualify as a disadvantaged business enterprise (DBE). SRTA's overall agency goal for participation by DBEs in its federally funded contracts between October 1, 2017 – September 30, 2020 is 11%. Additional contract requirements related to participation by DBEs are specified in Part 3 – Contract of this RFP.

As an incentive to increase utilization of minority-owned businesses as subcontractors on State purchases, the State of Georgia provides for an income tax adjustment on the state tax return of any company that subcontracts with a State certified minority-owned firm to furnish goods, property, or services to the State of Georgia, including SRTA. The Tax Incentive Program is codified at [O.C.G.A. §48-7-38](#) and is managed by the Georgia Department of Revenue.

2.12 *Conflicts of Interest*

SRTA has adopted Standards of Ethical Conduct for Purchasing for SRTA employees involved in procurement. It is a breach of ethical standards for any SRTA employee to participate directly or indirectly in a procurement when the employee knows:

- The employee or any member of the employee's immediate family has a financial interest pertaining to the procurement;
- A business or organization in which the employee, or any member of the employee's immediate family, has a financial interest pertaining to the procurement; or
- Any other person, business or organization with whom the employee or any member of employee's immediate family is negotiating or has an arrangement concerning prospective employment is involved in the procurement.

SRTA employees are also bound by the Georgia Governor's Executive Order dated January 10, 2011 for "Establishing a Code of Ethics for Executive Branch Officers and Employees". The Executive Order prohibits SRTA and SRTA employees, or any person acting on their behalf, from accepting, directly or indirectly, any gift from any person with whom the employee interacts on official SRTA business. Therefore, it is unlawful for a potential Proposer, or its subcontractors or suppliers, to make gifts or favors to any SRTA employee. It is also unlawful for any SRTA employee to accept any such gift or favor. In addition, any persons acting as members of the Proposal Review Committee for this procurement shall, for the purposes of this procurement, be bound by SRTA's Standards of Ethical Conduct for Purchasing and the referenced Executive Order.

Throughout the proposal evaluation and award process and subsequent contract negotiations, Proposers shall not discuss or seek specific information about this procurement, including but not limited to, the contents of submissions, the evaluation process or the contract negotiations, with members of the Proposal Review Committee, the SRTA Board of Directors, or SRTA employees other than Leanna Jordan Pierre, Procurement & Contracts Manager.

2.13 Contractual Relationships

SRTA intends to execute the Contract, attached as Part 3 of this RFP, for the provision of the required services with the selected Contractor(s). The selected Contractor's contractual responsibility must solely rest with one firm or legal entity, which shall not be a subsidiary or affiliate with limited resources. Proposer's Proposal Letter, included as Offer Document #2 of this RFP, must clearly indicate the firm or entity responsible for contract execution.

SRTA shall not be a party to agreements between the selected Contractor and/or any subcontractors it may choose to employ during fulfillment of the Contract; however, the selected Contractor shall execute fair and reasonable agreements with its subcontractors (if any) and shall provide SRTA with copies of said agreements not later than five business days prior to their execution. Additional contract requirements related to Subcontractors are specified in the Contract.

2.14 Small Business Participation

SRTA strongly supports the participation of small business owners in its contracts. It is the policy of the SRTA to ensure nondiscrimination in the award and administration of DOT-assisted contracts. It is the intention of the SRTA to create a level playing field on which Small Businesses can compete fairly for contracts and subcontracts relating to its construction, procurement and professional services activities in compliance with the requirement of 49 C.F.R. 26.39.

2.15 Contractual Provisions

The contract to be executed between SRTA and the selected Contractor as a result of this solicitation is included as an attachment to this RFP. SRTA has no obligation to consider and/or approve exceptions or changes to the Contract. SRTA reserves the right to modify the Contract and/or include additional contractual provisions in the contract at its sole discretion.

The apparent successful Proposer must return two signed copies of the Contract to the SRTA Procurement & Contracts Manager within five business days of notification of intent to award.

Failure to do so may lead to rejection of the Proposer. SRTA reserves the right to proceed to discussions with the next ranked Proposer.

2.16 Responsibility for Compliance with Legal Requirements

Proposer's products, services, and facilities shall be in full compliance with any and all applicable federal, state, and local laws, regulations, ordinances, and standards and any standards adopted by nationally recognized testing facilities regardless of whether or not they are referred to in this RFP.

2.17 Conditional Proposals

Terms and conditions attached to a proposal by a Proposer and made a condition of contract execution may render the proposal non-responsive and may be rejected by SRTA.

2.18 Sales and Use Taxes

SRTA is exempt from paying sales and use taxes. All proposal prices must exclude sales and use taxes (if applicable).

2.19 Proposal Preparation Costs

All costs of proposal preparation, attendance at pre-proposal and/or pre-award meetings, and any other pre-award costs shall be at Proposer's sole cost and expense.

2.20 Contents of Contract

The contract resulting from this RFP shall consist of the following documents, which shall be incorporated therein:

- Contract;
- Definitions;
- RFP (including any addenda thereto);
- Contractor's Response;
- Contractor's Price Proposal;
- DBE Subcontractor Form

3. Contents of Complete Proposal

All Proposals should include a table of contents with page numbers and sufficient detail to facilitate easy reference to all requested information.

To be eligible for evaluation by SRTA as a complete, responsive proposal in response to SRTA Solicitation No. 18-150, any and all proposals submitted to SRTA must contain all fifteen (15) of the following documents, properly signed (as required), fully completed by the Proposer, and numbered and arranged in the following order:

3.1 Complete Proposal Checklist

- This document serves as a checklist for Proposers to ensure that their proposal is complete and ready for submission to SRTA. The document is used by SRTA during the evaluation of responsiveness of proposals.
- This document must be fully completed, signed, and submitted with the proposal.

- Blank checklist form is attached as Offer Document #1 of this RFP.

3.2 Proposal Letter

- This document summarizes the acknowledgements and representations made by and agreed to by the Proposer with regard to its proposal.
- This document must be fully completed, signed, and submitted with the proposal.
- Blank form is attached as Offer Document #2 of this RFP.

3.3 Acknowledgement of Addenda to RFP

- This document is required by Part 1, Section 2.5 of this RFP.
- This document must be fully completed, signed, and submitted with the proposal.
- If no addenda to the RFP were issued by SRTA, Proposer must still complete the form and include it in its proposal.
- Blank form is attached as Offer Document #3 of this RFP.

3.4 Proposer Information Form

- This document summarizes key information about the Proposer for SRTA's assistance and reference during evaluation of the proposals including:
 - Contact Information for Proposer
 - Corporate information
 - List of references for whom Proposer has performed similar services in the past ten years
- SRTA will contact the references listed on this document as part of its evaluation of proposals.
- If Proposer is a certified DBE, proof of DBE certification must accompany this document.
- This document must be fully completed, signed, and submitted with the proposal.
- Blank form is attached as Offer Document #4 of this RFP.

3.5 Proposer Certifications

- This document must be fully completed, signed, and submitted with the proposal.
- Blank form is attached as Offer Document #5 of this RFP.

3.6 Statement of Firm's Qualifications and Experience

- This document shall be provided by the Proposer and shall be a narrative description of the Proposer's qualifications and experience. This narrative description shall include the appropriate use of headings and subheading that address, at minimum, the following elements:
 - Brief description of the Proposer (brief history, number of employees, lines of business, areas of specialization, office locations, organization, etc.)
 - Description of the firm's experience in performing work of a similar nature to that solicited in this RFP, specifically public relations/communications/marketing for governmental organizations and/or organizations in the transportation industry, and the participation in such work by the key personnel proposed for assignment to this project.

- Highlight the firm's experience with the work or services identified in Scope of Services.
 - Comprehensive listing and brief descriptions of relevant engagements started and/or completed during the last five years that are similar in scope and nature to the Scope of Services, attached to this RFP.
- There is no prescribed format for this document. The format of the document shall be at the discretion of Proposer; however, the document shall be limited to no more than fifteen (15) single-side typed pages, font size no smaller than 10 pt, with no more than five (5) pages allocated for graphics and/or designs. Proposer should label this document as Offer Document #6 in its proposal.

3.7 Project Team and Project Approach

- This document shall be provided by the Proposer and shall be a narrative description of the Proposer's project team and approach. This narrative description shall include the appropriate use of headings and subheading that address, at minimum, the following elements:
- Firm's technical approach to the project and interpretation of the Scope of Services, including the Tasks identified in the Scope of Services section
 - Identify the adequacy of the firm's resources, including personnel, labor, equipment and supplies, etc.
 - Proposed project approach and plan in response to the Scope of Services
 - Resumes of project team members
 - Any special or unique benefits that the proposed team and/or its approach brings to the Scope of Services
- There is no prescribed format for this document. The format of the document shall be at the discretion of Proposer; however, the document shall be limited to no more than fifteen (15) single-side typed pages, font size no smaller than 10 pt. Note, team member resumes shall not be counted towards the page limit restriction. Proposer should label this document as Offer Document #7 in its proposal.

3.8 Sample Printed Materials

- These documents shall be provided by the Proposer. Proposer shall submit samples of the following documents:
- Annual Reports
 - Brochures
 - Information Kits
 - Print Advertising
- Proposer should label this document as Offer Document #8 in its Proposal.

3.9 Price Proposal

- This document must be fully completed, signed, and submitted with the proposal ***in a separately sealed envelope or package.***
- A blank Price Proposal is attached as Offer Document #9 of this RFP.

3.10 Contractor Affidavit under O.C.G.A. § 13-10-91(b)(1)

- This document must be fully completed, signed, and submitted with the proposal.
- Blank form is attached as Offer Document #10 of this RFP.

3.11 Subcontractors and DBEs

- This document must be fully completed, signed, and submitted with the proposal.
- If any identified subcontractor is a certified DBE, proof of DBE certification must accompany this document.
- Blank form is attached as Offer Document #11 of this RFP.

3.12 Certification Regarding Suspension and Debarment

- This document must be fully completed, signed, and submitted with the proposal.
- Blank form is attached as Offer Document #12 of this RFP.

3.13 Certification Regarding Lobbying

- This document must be fully completed, signed, and submitted with the proposal.
- Blank form is attached as Offer Document #13 of this RFP.

3.14 Non-Collusion Affidavit

- This document must be fully completed, signed, and submitted with the proposal.
- Blank form is attached as Offer Document #14 of this RFP.

3.15 Anti-Boycott, Divestment and Sanctions Against Israel Certification

- This document must be fully completed, signed, and submitted with the proposal.
- Blank form is attached as Offer Document #15 of this RFP.

4. Proposal Evaluation and Contract Award**4.1 Standards for Award**

SRTA Solicitation No. 18-150 is a Request for Proposals (RFP). SRTA intends to award a contract to the Proposer whose proposal conforms to the solicitation and is determined to be the most advantageous to SRTA, taking into consideration price and other evaluation factors set forth below. Accordingly, SRTA may not necessarily make an award to the Proposer with the highest technical ranking nor award to the Proposer with the lowest price proposal if doing so would not be in the overall best interest of SRTA.

In order to be eligible for contract award a proposal must meet all of the following criteria:

4.1.1 The proposal submitted is responsive to the solicitation.

- A proposal shall be considered responsive if it conforms in all material aspects to the requirements of the solicitation at the scheduled time of submission and does not require further discussions with the Proposer.
- It shall be at the sole discretion of SRTA to determine if a proposal conforms in all material aspects to the requirements of the solicitation.

- 4.1.2 The Proposer who submitted the proposal is a responsible Proposer. A Proposer shall be considered responsible if the Proposer possesses, at the time of contract award, the ability to perform successfully and a willingness to comply with the terms and conditions of the contract (attached to this RFP).
- 4.1.3 The Proposer is judged, at the sole discretion of SRTA, to be the qualified firm(s) that offers the best value to SRTA for the Services to be provided.

4.2 *Evaluation and Award Process*

All proposals shall be evaluated by an Evaluation Committee. Proposals and evaluations will be kept strictly confidential throughout the evaluation and award process. Only the members of the Evaluation Committee and other SRTA staff having a legitimate work-related interest will be provided access to the proposals and evaluation results during the evaluation and award process. Proposals will be evaluated and a contract will be awarded in accordance with the following process:

- 4.2.1 Proposals will first be evaluated by the SRTA Procurement and Contracts Manager for responsiveness in accordance with the standard set forth in Part 1, Section 4.1.1 above. Only those proposals that are determined to be responsive shall be evaluated for Proposer responsibility.
- 4.2.2 Proposers who submitted responsive proposals will be evaluated by the Evaluation Committee for responsibility in accordance with the standard set forth in Part 1, Section 4.1.1 above.
- 4.2.3 Proposals that are determined to be responsive and that were submitted by responsible Proposers shall be further evaluated by the Evaluation Committee to determine the Proposal(s) that is/are most advantageous to SRTA.

To determine the most advantageous proposal to the SRTA, the Evaluation Committee will evaluate the proposals taking into consideration the following criteria:

- **Firm's Qualifications and Experience (30 point maximum)**- Proposer's background, financial stability, company history, employee number and availability for project, etc.
- **Project Team and Approach (30 point maximum)**- Proposer's experience with projects of similar scope and size.
- **Price Proposal (15 point maximum)**- Evaluation Committee shall specifically consider information submitted in accordance with Section 3.7.
- **References (25 point maximum)**- Evaluation Committee shall specifically consider information submitted in accordance with Sections 3.4 and 3.6.
- **Interviews-Optional (20 point maximum)**- The Evaluation Committee may choose to invite selected proposers to make presentations and participate in interviews with the committee prior to completing its ranking of proposals. It shall be at the discretion of the Evaluation Committee as to whether it will conduct interviews and as to how many and which Proposers will be invited to make presentations and participate in interviews with the committee. Proposers

that are invited for interviews may earn up to 20 points based on the quality of the interview.

- 4.2.4 Upon completion of the evaluation process by the Evaluation Committee, a recommendation to award a Contract to the Proposer who submitted the most advantageous proposal to SRTA, as solely determined by the Evaluation Committee, and that meets the standards for contract award specified in Section 4 will be forwarded to the SRTA Executive Director.
- 4.2.5 The SRTA Executive Director may, at his or her sole discretion, delay consideration of the Recommendation for Contract Award or reject the recommendation and award the contract to another Proposer(s) or cancel the procurement altogether.
- 4.2.6 SRTA will execute a contract with the successful Proposer and will issue a Notice to Proceed.
- 4.2.7 SRTA reserves the right issue multiple contract awards under this solicitation.

PART 2 – SCOPE OF SERVICES

OVERVIEW

The State Road and Tollway Authority is issuing this Request for Proposals (RFP) in order to establish a Contract for Marketing and Customer Engagement Consulting Services. SRTA is seeking responses from qualified and experienced firms interested in providing marketing and customer engagement consulting services which align with SRTA's professional image, goal achievement, and branding. SRTA performs some graphic design work in house as well as some copywriting, strategic planning, marketing promotion development, publication writing and media relations. SRTA will utilize the Contract(s) awarded as a result of this RFP on an as-needed basis. No minimum amount of work is guaranteed.

The successful Proposer will have demonstrated experience in brand building, marketing, public relations, social media marketing, government communications, cause related marketing, transportation initiatives and strategic communications related to transit and tolling systems.

The successful Proposer(s) will perform work in support of the following SRTA goals and objectives in cooperation with SRTA Staff:

1. Promote SRTA services that result in increased use of the Express Managed Lane System.
2. Increase awareness of the value and benefit SRTA provides to key audiences. This includes area residents, commuters, youth, seniors, employers, community organizations, and other designated stakeholder groups.
3. Build and maintain positive relationships with SRTA customers, taxpayers, community partners, and news media, among others.
4. Advance the SRTA brand and the delivery of a positive brand promise.
5. Inform customers, stakeholders and the general public about SRTA news and activities.
6. Position SRTA as a customer-focused, cost effective, and valuable public service agency and as an innovative leader in the public transportation industry.
7. Encourage community and stakeholder participation in SRTA's planning efforts and public involvement opportunities.

BACKGROUND

SRTA's mission is connecting people, jobs, and communities through preferred mobility options and innovative solutions. SRTA's vision is to be an integral component of Georgia's mobility network and a national leader for innovative transportation. The agency's marketing and communications work supports its mission and vision with strong community partnerships, broad public engagement, education/awareness and mobility and connectivity programs, and initiatives reflective of being a good public steward.

Examples of specific services to be provided may include, but are not limited to, the following:

1. Develop and/or support targeted Peach Pass campaigns and specific market promotions. This may include strategic development, research, and implementation assistance.
2. Maintain and update the existing annual report, numerous other service brochures, and collateral materials in both printed and electronic formats.
3. Develop materials and support Peach Pass programs.
4. Develop advertisements for digital, audio, video and print media.
5. Produce graphics for Peach Pass materials (i.e. welcome kits, transponders).
6. Develop materials for Peach Pass fairs and community events.

7. Apply community-based social marketing principles to enhance SRTA marketing efforts.
8. Assist with social media and mobile applications to maximize effectiveness of marketing activities and stakeholder engagement.
9. Support the development, implementation and evaluation of marketing programs for SRTA's managed lanes.
10. Support the SRTA's Strategic Marketing & Communications Plan. This may include review of the existing document, identifying marketing messages and channels, and working with SRTA staff on strategic marketing planning for the future.

CONTRACTOR RESPONSIBILITIES

Contractor will, in conjunction with SRTA staff and its partner organizations, develop and implement creative development and marketing and communications solutions for multiple target audiences and a variety of services and initiatives.

Solutions may include, but are not limited to the following:

Marketing & Advertising Campaign Development	Annual/ Progress Reports
Service Information Kits	Brochures
Corporate/Community Sponsorship Programs	Mystery Shopper
Creative Design	Outdoor Advertising
Crisis Communication Strategy	Photography
Focus Groups	Videography
Media Placement Recommendations/Media Placement	Press Conferences/Events
Earned Media Strategy	Print Advertising
Media Alerts	Newsletters
Talking Points/Speech Writing	Copywriting
Press Releases	Radio and Video/T.V. Scripts
Social Media Strategy	Internet Advertisements
Research	Media Training
Information Kits	Customer Appreciation/Loyalty Program Development

All graphic design work must be provided in a format editable using Adobe Creative Suite. Written documents, data and other materials shall be provided in a format editable using the most current version of Microsoft Office.

Contractor shall ensure that the proposed project team includes personnel who can provide all categories of services listed in the Scope of Services.

Contractor shall be responsible for providing coordination on project and supporting SRTA's work including, but not limited to:

- graphic design
- graphic, print and other project specifications;
- strategic planning;
- creation of project estimates;
- follow through on billing issues; and
- preparation of production-ready output

Contractor shall regularly engage with SRTA's marketing and/or communications team. Depending on the nature of the task order, this may involve daily, weekly and/or month contact. The type of contact, which shall be determined by the designated SRTA Project Manager, may include, but is not limited to:

- phone calls, email correspondence, and participation in client meetings;
- development and production of a diversity of marketing, communications, and video production deliverables;
- Regular oral and written progress reports and written quarterly evaluations; and
- presentation(s) to the State Road and Tollway Authority or other groups, as appropriate.

Contractor shall ensure that its proposed team has a working knowledge of and access to the following design programs and computer software (in a Windows-based PC operating system) currently used to create and edit SRTA marketing and communications materials: In Design, Illustrator, Photoshop Elements, SharePoint, and Microsoft Office. If, during the Contact term, Contractor elects to discontinue or change a software or design program that supports marketing and/or communications materials in use by SRTA, Contractor will convert SRTA's designs and materials to the new program or format at Contractor's sole expense. Contractor shall work in conjunction with identified SRTA personnel to ensure that the services and any deliverables are provided in accordance with industry standards and best practices.

SRTA's RESPONSIBILITIES

SRTA will:

1. Oversee, review, and approve all campaign, program, and project work.
2. Outline project needs, timeline, general budget and SRTA staff role(s) for project work.
3. Provide source materials for project work and be responsive to project development, creative concepts, defined deadlines, proof checks, billing issues, and other standard Contractor needs.
4. Coordinate advertising buys and placement directly with media, unless otherwise indicated.
5. Coordinate press release and related materials directly with media, unless otherwise indicated.

TASK ORDERS

SRTA anticipates that it will issue a Task Order (Order), or a similar order document, for specific work activities under the Awarded Contract(s). Each Order must be mutually agreed upon, in writing, between SRTA and the Awarded Contractor(s). Each Task Order will identify the scope of work and cost for a specific activity. Orders will be placed on an as-needed basis.

Tasks may include, but are not limited to:

- a) Development and execution of overall marketing/communications plan, "the strategy."
- b) Design and production of media ads (including web and social media) and recommendations/guidance on resultant media buys. (SRTS reserves the right to handle ad placement with internal staff and budget.)
- c) Design and production of any and all collateral materials including online/social media, mailers, handouts, post cards, brochures, etc.
- d) Planning and execution of on-site and special-event marketing, creating opportunities to engage customers at related facilities such as service plazas, colleges, employment centers, and community events.
- e) Project management for communications, media relations, public relations including message development, media presentation, proactive media outreach, placement of by-lined articles, editorial writing, media tracking and reporting, crisis communication, issues management and related tasks.
- f) Provide general advertising, communications and public relations counsel.
- g) Project planning to achieve communications goals.
- h) Explore and advise on potential partnerships with other public and private entities for joint marketing/co-branding opportunities.
- i) Other activities as may be mutually agreed to in writing by SRTA and Proposer.
- j) Regular oral and written progress reports and written quarterly evaluations