



Request for Proposal #2020-016 **Logo Redesign and Branding Guidelines**

Due Date: October 16, 2019

Time: 2:00 pm EST.

Receipt Location: Government Building
500 N. Main Street, Suite #709
Procurement Department
Monroe, NC 28112

Procurement Contact Person

Name: Lenore Bishop, CLGPO

Title: Senior Procurement Specialist

E-mail: Lenore.bishop@unioncountync.gov

Telephone: 704-283-3683

Notice of Advertisement

Union County North Carolina is Soliciting Proposals for

RFP # 2020-016 Logo Redesign and Branding Guidelines

Sealed proposals, so marked, will be received by mail or hand delivery to Union County's Procurement Department until **2:00PM EST** (local time) on **October 16, 2019**, at the Union County Government Center, Procurement Department, 500 North Main Street, Suite #709, Monroe, NC 28112.

The scope of this work is to hire a qualified individual or firm to provide the development of a new Union County logo and branding guidelines.

Union County (UC) reserves the right to reject any or all proposals, to waive technicalities and to make such selection deemed in its best interest. With limited response, Union County reserves the right to extend the solicitation opening date as appropriate in order to assure a competitive procurement process. Union County encourages good faith effort outreach as described in UC MBE and Small Business Outreach Plan.

Responding firms are required to comply with the NC non-collusion requirements. Union County reserves the right to reject any and or all bids.

For purposes of coordination, primary Procurement contact for project information is: Lenore Bishop, Procurement Department at, Lenore.bishop@unioncountync.gov .

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Section 1 –Submittal Deadline and Addendum Information

A. Proposal Submission Deadline

Submittals shall be sealed and labeled on the outside **RFP# 2020-016 Logo Redesign and Branding Guidelines**. RFP's are to be received by the Union County, Procurement Department by **2:00 EST on October 16, 2019**. **Any submittals received after this date and time shall be rejected without exception.**

Mail or hand-deliver submission packets to:

Union County Government Building
Procurement Department
500 North Main Street, Suite #709
Monroe, NC 28112

Attention: Lenore Bishop, Senior Procurement Specialist

The proposal must be submitted in printed form and electronically on a non-returnable flash drive or CD. **One (1) original (mark "ORIGINAL") plus five (5) hard copies** of the proposal must be submitted. The original proposal package must have original signatures and must be signed by a person who is authorized to bind the proposing firm. All additional proposal sets may contain photocopies of the original package.

Electronic (email) or facsimile submissions will not be accepted.

There is no expressed or implied obligation for Union County to reimburse firms for any expenses incurred in preparing proposals in response to this request.

Union County reserves the right to reject any or all proposals or to select the proposal, which in its opinion, is in the best interest of the County.

Union County reverses the right to award to multiple vendors.

B. Proposal Questions

Proposal questions will be due on **October 1, 2019** by **3:00 pm EST**. The primary purpose of this is to provide participating firms with the opportunity to ask questions, in writing, related to the RFP.

Submit questions by e-mail to **Lenore Bishop** at lenore.bishop@unioncountync.gov by the **deadlines shown above**. The email should identify the RFP number and project title. All questions and answers may be posted as addenda on the Union County Website (Procurement Page) and/or the State of North Carolina "IPS" Website.

C. Addendum

Union County may modify the RFP prior to the date fixed for submission of proposals by the issuance of an addendum.

Any addenda to these documents shall be issued in writing. No oral statements, explanations, or commitments by anyone shall be of effect unless incorporated in the written addenda. Receipt of Addenda shall be acknowledged by the Offeror on Addenda Receipt and Anti-Collusion form.

Section 2 - Introduction

Objective

The purpose of this RFP is to contract with an experienced and qualified individual or firm to provide the development of a new Union County logo and branding guidelines.

Background/General Information

Union County is a thriving county in the greater Charlotte Metropolitan Area. It is located to the east of Mecklenburg County/Charlotte and borders the South Carolina state line. The current population is approximately 240,000 and has grown significantly over the last two decades. As the eighth largest county in the state of North Carolina, there are no indications that population growth and the general prosperity will slow down. Union County Government employs approximately 1,200 people across several departments.

Currently, Union County Government branding is inconsistent. The purpose of this project is to develop a fresh, new logo that captures the essence of Union County as a unique geographic area and the spirit of the government agency.

The current branding challenges include:

- Development of a logo in 2017 that wasn't fully implemented across all materials and channels
- Inconsistent use between a single-color County seal and the full-color version of the same County seal
- No guidelines on the use of the 2017 logo versus the two County seal treatments
- Departments within the County organization with different logos that may or may not resemble the 2017 logo or seal treatments

Section 3 - Scope of Work

Union County is seeking a consultant to develop a new, fresh logo and branding guidelines that will be used to unite our government agency and strike confidence and awareness of the services and benefits that Union County Government provides our community.

This project breaks down into the following phases:

- Phase 1-Review and research
 - Conduct an audit of current logos, seals and materials
 - Build an understanding of Union County through a series of 3-5 interviews with stakeholder groups and online research

- Phase 2-Develop a refreshed Union County logo, required variations of the logo and the key messages that describe and support them
 - Provide final graphic files for the following logo treatments:
 - Primary logo
 - Smaller bug version of primary
 - B/W version
 - Wearables version
 - UCTV logo
 - The logo design/guidelines need to address the use of the seal. The consultant should provide their recommendation on the use overall, and if recommended to use, the consultant should detail the recommended seal treatment.
 - The logo design needs to address the ability to note individual departments.

- Phase 3-Develop a printable version of the brand guidelines
 - The guidelines should include:
 - Key messaging behind the meaning of the refreshed brand and logo
 - Graphic standards and rules for use of the logos
 - Do's and don'ts for the logos
 - Color standards
 - Typography standards
 - Photography standards
 - Social media graphic standards
 - Design of key materials including, but not limited to:
 - Business cards
 - Electronic signatures
 - Email banner graphics (external and internal)
 - Letterhead and envelopes (large and small)
 - Mailing Labels
 - Reports, memos and general word processing documents
 - Formal documents (agendas, public notices, press releases)
 - Notepads
 - Note cards
 - Marketing materials (brochures-tri-fold/bi-fold/full-page, banner stands, booths, posters, etc.)
 - Premiums (coffee mugs; pens; wearables-shirts-polo/t-shirts, jackets, sweatshirts, pants; name tags-employee and elected official)

- Signage and wayfinding guidance (street signs, building signs, directional signage inside UC facilities)
- Fleet (address vehicle graphics for specific uses-resident transportation buses, public works, parks and recreation, etc.)
- Video treatments (standard video opening and closing graphics; lower third graphic standards)
- Screensaver
- Powerpoint presentation
- Phase 4-Template development for select pieces
 - Word-electronic letterhead, reports, memos, general document, mailing labels
 - Powerpoint-build a robust powerpoint template and user tips
 - Prepare for printing-envelopes, mailing labels, note cards, notepads, business cards
 - Indesign template-develop baseline templates for brochures, banner stands, posters, email banners

The creation of a new Union County logo will be a cornerstone for raising awareness about the services and benefits provided by Union County Government to the surrounding community. We want our brand to reside within the hearts and minds of our residents and to be a reflection of our unique community. The new logo and branding should create a sense of place and evoke pride in employees and partners of Union County Government.

Project Approach

The Consultant needs to demonstrate an understanding of the community in the submitted proposals.

The Consultant needs to recommend an approach that is a public process and will include the following:

- Initial meeting with project team
- Regular project team meetings
- Stakeholder input through the effective use of work sessions, roundtables or charrette-style meetings
- Recommendation on soliciting public input

Section 4 – Detailed Submittal Requirements

A. Proposal format

Offeror(s) should prepare their proposals in accordance with the instructions outlined in this section. Each offeror is required to submit the proposal in a sealed package. Proposals should be prepared as simply as possible and provide a straightforward, concise description of the offeror's capabilities to satisfy the requirements of the RFP. The total length of the proposal, including cover letter, should be no more than 25 single-sided pages. Font size should be no smaller than Arial Narrow 11pt. Samples and resumes may also be provided as an appendix to the document and will not count

against the page limit. Covers and tabs do not count against page limit. Utmost attention should be given to accuracy, completeness, and clarity of content. All parts, pages, figures, or tables should be numbered and clearly labeled. Response information should be limited to pertinent information only.

The proposal should be organized into sections:

- **Tab A** - Firm Experience and Qualifications
- **Tab B** – Team/Staff Experience
- **Tab C** – Approach and Implementation Plan
- **Tab D** - Fee Schedule
- **Tab E** - References
- **Tab F** - Required Signature Forms: Attachment A Proposal Submission Form and Attachment B - Addenda Receipt and Anti-Collusion

1. Tab A – Firm Experience and Qualifications

Please provide the following information about your company, experience and services. Respond to each item and provide supporting documentation, as requested or desired.

Company Name

Address

Telephone Number

Email Address

Name of Single Point of Contact

Name/Signature of Person with binding authority to enter into contracts

- a. An overview of your company’s history including detailed information on firm size, number of employees, years in business, and financial stability
- b. Provide information on current workload and how this project will be accomplished with current staff
- c. Provide a description and images of a minimum of three similar, relevant projects to the scope of services requested. Include reference information for the projects including an email or phone number for the primary contact.
 - a. Please provide any additional information about your company’s unique abilities to meet the project requirements as described in this RFP.

2. Tab B – Team/Staff Experience

- a. Provide a list of individual(s) who will be working on this project and indicate the functions that each will perform.

- b. Provide brief resumes of essential staff assigned to perform services for this project and include any government projects of similar nature.
- c. List percentage of time assigned staff will dedicate to this project.

3. Tab C – Approach and Timeline

- a. Demonstrate your understanding of the scope of work; include previous samples and successes
- b. Detail your approach and a timeline to complete the project broken down by each phase
- c. Identify any foreseeable problems in the implementation of this project
- d. Discuss your previous roles in presenting and attending meetings with citizens and/or elected officials
- e. Detailed description of specific tasks you will require from County staff. Explain what the respective roles of County staff and your staff would be to complete the tasks specified in the Scope of Work.

4. Tab D – Fee Schedule

- a. Provide a detail break down of all fees by phase, including reimbursable expenses. Reimbursable expenses should be assumed to be billed at cost, without markup. Rates are negotiable.

5. Tab F – References

Provide at least three (3) professional references that received similar logo and branding services from your firm. Union County reserves the right to contact any of the organizations of individuals listed. Information provided shall include:

- a. Company Name
- b. Company Address
- c. Phone Number and E-mail Address
- d. Contact Name and Title
- e. Project Description
- f. Length Of Service

6. Tab G – Required Signature Forms

Offeror(s) should include signed copies of the following documents:

Attachment A – Proposal Submission Form

Attachment B – Addenda Receipt and Anti-Collusion

Section 5 – Evaluation Criteria

5.1 Maintaining the integrity of the RFP process is of paramount importance for the County. To this end, do not contact any member of the Union County Board of Commissioners or any member of the Union County staff regarding the subject matter of this RFP until a selection is made, other than the County's designated procurement contact person identified in the introduction to this RFP. Failure to abide by this requirement shall be grounds for disqualification from this selection process.

- a) The Owner will establish an RFP Evaluation Team to review and evaluate the Proposals. The RFP Evaluation Team will evaluate the proposals independently in accordance with the published evaluation criteria. The County reserves the right to make an award without further discussion of the proposals received. Therefore, it is important that the proposal be submitted initially on the most favorable terms from both a technical and cost standpoint. Union County reserves the right to conduct interviews with a shortlist of selected respondents (not required).
- b) A proposal may be rejected if it is incomplete. Union County may reject any or all proposals and may waive any immaterial deviation in a proposal.
- c) More than one proposal from an individual, firm, partnership, corporation or association under the same or different names, will not be considered.
- d) At its sole discretion, the Owner may ask written questions of Offerors, seek written clarification, and conduct discussions with Offerors on the proposals.
- e) The Owner will provide written notification to all Short Listed Offerors of the selection at the conclusion of the Procurement.
- f) At the Owner's discretion, it will initiate negotiations with the Preferred Offeror. The "Preferred Offeror" is the Offeror that the Owner determines achieves the apparent best overall score/ranking. If the Owner is unable to execute a contract with the Preferred Offeror, negotiations with the Preferred Offeror may be terminated, and provided that such negotiations are terminated in writing, the Owner may proceed to negotiate with the next Preferred Offeror. The Owner will continue in accordance with this procedure until a contract agreement is reached or the selection process is terminated. Negotiations are at the Owner's sole discretion.

5.2 Evaluation and Score/Ranking of Offerors

- a) In the evaluation and score/ranking of Offerors, the Owner will consider the information submitted in the proposal as well as the meetings with respect to the evaluation criteria set forth in the RFP.

The initial evaluation criteria/factors and relative weights listed below will be used to recommend selection of the Proposed Offeror or for the purpose of selecting Short-Listed Offerors. The County may choose to award without engaging in interview discussions.

Evaluation Criteria	Weight
Firm Experience and Qualifications	25%
Team/Staff Experience	25%
Approach and Implementation Plan	25%
Fee Schedule	20%
Compliance with RFP requirements	5%

- b) After identification of Short-Listed Offerors, the Owner may or may not decide to invite Short-Listed firms to interviews. If interviews are scheduled with the Short-Listed Offerors, previous evaluation and rankings are not carried forward. For the purpose of selecting a Preferred Offeror, the evaluation criteria will be given the following relative weights.

Interviews	Evaluation Criteria	Weight
	Experience and Qualifications Team/Staff and Availability of Resources	45%
	Project Approach and Implementation Samples/Examples	45%
	Quality and Relevance of Interview as it relates to the scope of the RFP	10%

Section 6 – General Conditions and Requirements

A. Terms and Conditions

The term of contract shall be for one (1) year, with a one (1) renewal option pending annual budget appropriation.

The Owner reserves the right to terminate the Contract at any time during the Contract Period for any reason including, but not limited to, poor performance, poor quality of work, safety violations, slow or non-compliance with the Contract requirements, lack of regard for local and State agencies and the public, and failure to address punch-list issues that arise.

All proposals submitted in response to this request shall become the property of Union County and as such, may be subject to public review upon award of contract.

Union County has the right to reject any or all proposals, to engage in further negotiations with any firm submitting a proposal, and/or to request additional information or clarification. The County is not obligated to accept the lowest cost proposal. The County may accept the proposal that best serves its needs, as determined by County officials in their sole discretion.

All payroll taxes, liability and worker's compensation are the sole responsibility of the Offeror(s). The Offeror(s) understands that an employer/employee relationship does not exist under this contract.

Union County reserves the right to award to multiple vendors.

B. Sub-Contractor/Partner Disclosure

A single firm or multiple firms may propose the entire solution. If the proposal by any firm requires the use of subcontractor, partners, and/or third-party products or services, this must be clearly stated in the proposal. The firm submitting the proposal shall remain solely responsible for the performance of all work, including work that is done by subcontractor.

C. Modification or Withdrawal of Proposal

Prior to the scheduled closing time for receiving proposals, any Vendor may withdraw their proposal. After the scheduled closing time for receiving proposals, no proposal may be withdrawn for 180 days. Only written requests for the modification or correction of a previously submitted proposal that are addressed in the same manner as proposals and are received by the County prior to the closing time for receiving proposals will be accepted. The proposal will be corrected in accordance with such written requests, provided that any such written request is in a sealed envelope that is plainly marked "Modification of Proposal – "2020-016 Logo Redesign and Branding Guidelines"". Oral, telephone, or fax modifications or corrections will not be recognized or considered.

D. Equal Employment Opportunity: All Firms will be required to follow Federal Equal Employment Opportunity (EEO) policies. Union County will affirmatively assure that on any project constructed pursuant to this advertisement, equal employment opportunity will be offered to all persons without regard to race, color, creed, religion, national origin, sex, and marital status, status with regard to public assistance, membership or activity in a local commission, disability, sexual orientation, or age.

E. Minority Businesses (MBE) or Disadvantaged Businesses (DBE): It is the policy of Union County that Minority Businesses (MBEs), Disadvantaged Business Enterprises (DBEs) and other small businesses shall have the opportunity to compete fairly in contracts financed in whole or in part with public funds. Consistent with this policy, Union County will not allow any person or business to be excluded from participation in, denied the benefits of, or otherwise be discriminated against in connection with the award and performance of any contract because of sex, race, religion, or national origin.

F. Drug-Free Workplace: During the performance of this Request, the Firm agrees to provide a drug-free workplace for his employees; post in conspicuous places, available to employees and applicants for employment, a statement notifying employees that the unlawful manufacture, sale, distribution, dispensation, possession, or use of a controlled substance or marijuana is prohibited in the workplace and specify the actions that will be taken against employees for violations of such prohibition; and state in all solicitations or advertisements for employees placed by or on behalf of the firm that the Firm maintains a drug-free workplace.

For the purposes of this section, “drug-free workplace” means a site for the performance of work done in connection with a specific contract awarded to a Contractor/firm in accordance with this chapter, the employees of whom are prohibited from engaging in the unlawful manufacture, sale, distribution, dispensation, possession or use of any controlled substance or marijuana during the performance of the Request.

G. E-Verify

Offeror(s) shall utilize the U.S. Department of Homeland Security’s E-Verify system to confirm the employment eligibility of all persons employed by the Offeror(s) during the term of the Contract to perform employment duties within North Carolina and all persons, including subcontractors, assigned by the Offeror(s) to perform work pursuant to the contract with the County, as may be required by North Carolina statutes.

Section 7 – Insurance

One or more of the following insurance limits may be required if it is applicable to the project.

At Contractor’s sole expense, Contractor shall procure and maintain the following minimum insurances with insurers authorized to do business in North Carolina and rated A-VII or better by A.M. Best.

A. WORKERS’ COMPENSATION

Statutory limits covering all employees, including Employer’s Liability with limits of:

- \$500,000 Each Accident
- \$500,000 Disease - Each Employee
- \$500,000 Disease - Policy Limit

B. COMMERCIAL GENERAL LIABILITY

Covering Ongoing and Completed Operations involved in this Agreement.

- \$2,000,000 General Aggregate
- \$2,000,000 Products/Completed Operations Aggregate
- \$1,000,000 Each Occurrence
- \$1,000,000 Personal and Advertising Injury Limit
- \$5,000 Medical Expense Limit

C. COMMERCIAL AUTOMOBILE LIABILITY

\$1,000,000 Combined Single Limit - Any Auto

D. PROFESSIONAL LIABILITY

\$1,000,000 Claims Made

Contractor shall provide evidence of continuation or renewal of Professional Liability Insurance for a period of two (2) years following termination of the Agreement.

E. POLLUTION LIABILITY INSURANCE

\$1,000,000 Claims Made

Contractor shall provide evidence of continuation or renewal of Pollution Liability Insurance for a period of two (2) years following termination of the Agreement.

F. NETWORK SECURITY & PRIVACY LIABILITY (CYBER)

\$1,000,000 Claims Made

Contractor shall provide evidence of continuation or renewal of Technology Errors & Omissions Insurance for a period of two (2) years following termination of the Agreement.

G. ABUSE AND MOLESTATION INSURANCE

\$300,000 Per Claim

\$300,000 Aggregate Limit

H. Builder's Risk

Amount of Contract

ADDITIONAL INSURANCE REQUIREMENTS

- A. The Contractor's General Liability policy shall be endorsed, specifically or generally, to include the following as Additional Insured:

UNION COUNTY, ITS OFFICERS, AGENTS AND EMPLOYEES ARE INCLUDED AS ADDITIONAL INSURED WITH RESPECTS TO THE GENERAL LIABILITY INSURANCE POLICY.

Additional Insured status for Completed Operations shall extend for a period of not less than three (3) years from the date of final payment.

- B. Before commencement of any work or event, Contractor shall provide a Certificate of Insurance in satisfactory form as evidence of the insurances required above.
- C. Contractor shall have no right of recovery or subrogation against Union County (including its officers, agents and employees).
- D. It is the intention of the parties that the insurance policies afforded by contractor shall protect both parties and be primary and non-contributory coverage for any and all losses covered by the above-described insurance.
- E. Union County shall have no liability with respect to Contractor's personal property whether insured or not insured. Any deductible or self-insured retention is the sole responsibility of Contractor.
- F. Notwithstanding the notification requirements of the Insurer, Contractor hereby agrees to notify County's Risk Manager at 500 N. Main Street # 130, Monroe, NC 28112, within two (2) days of the cancellation or substantive change of any insurance policy set out herein. Union, in its sole discretion, may deem failure to provide such notice as a breach of this Agreement.
- G. The Certificate of Insurance should note in the Description of Operations the following:
- Department: _____
Contract #: _____
- H. Insurance procured by Contractor shall not reduce nor limit Contractor's contractual obligation to indemnify, save harmless and defend Union County for claims made or suits brought which result from or are in connection with the performance of this Agreement.
- I. Certificate Holder shall be listed as follows:
- Union County
Attention: Keith A. Richards, Risk Manager
500 N. Main Street, Suite #130
Monroe, NC 28112
- J. If Contractor is authorized to assign or subcontract any of its rights or duties hereunder and in fact does so, Contractor shall ensure that the assignee or subcontractor satisfies all requirements of this Agreement, including, but not limited to, maintenance of the required insurances coverage and provision of certificate(s) of insurance and additional insured endorsement(s), in proper form prior to commencement of services.

8. Indemnification

The Firm agrees to protect, defend, indemnify and hold Union County, its officers, employees and agents free and harmless from and against any and all losses, penalties, damages, settlements, costs, charges, professional fees or other expenses or liabilities of every kind and character arising out of or relating to any and all claims, liens, demands, obligations, actions, proceedings, or causes of action of every kind in connection with or arising out of this Agreement and/or the performance hereof that are due, in whole or in part, to the negligence of the Firm, its officers, employees, subcontractors or agents. The Firm further agrees to investigate, handle, respond to, provide defense for, and defend the same at its sole expense and agrees to bear all other costs and expenses related thereto. In addition, the Firm shall defend, indemnify, and hold Union County harmless from and against any and all losses, damages, expenses and liabilities suffered by Union County or to which Union County becomes subject, resulting from, arising out of or relating to any claim of copyright or infringement occurring in connection with or in any way incidental to or arising out of the occupancy, use, service, operations or performance of work under this Request.

Attachment A – Proposal Submission Form
RFP # 2020-016
Logo Redesign and Branding Guidelines

This Proposal is submitted by:

Provider Name: _____

Representative (printed): _____

Representative (**signed**): _____

Address: _____

City/State/Zip: _____

E-mail Address: _____

Telephone: _____
(Area Code) Telephone Number

Facsimile: _____
(Area Code) Fax Number

It is understood by the Offeror that Union County reserves the right to reject any and all Proposals, to make awards according to the best interest of the County, to waive formalities, technicalities, to recover and rebid this RFP. Proposal is valid for one hundred and twenty (120) calendar days from the Proposal due date.

Offeror _____ Date _____

Authorized Signature _____

Please type or print Name _____

Attachment B – Addenda Receipt and Anti-Collusion
RFP # 2020-016
Logo Redesign and Branding Guidelines

Please acknowledge receipt of all addenda by including this form with your Proposal. Any questions or changes received will be posted as an addendum on www.co.union.nc.us and/or www.ips.state.nc.us. It is your responsibility to check these sites for this information.

ADDENDUM #:	DATE ADDENDUM DOWNLOADED
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

I certify that this proposal is made in good faith and without collusion with any other offeror or officer or employee of Union County.

(Please Print Name)

Date

Authorized Signature

Title

E-Mail Address

Company Name