COLORADO
Financial Services
Division of Contracts & Procurement

REQUEST FOR PROPOSAL

IHGA 2021000282

Marketing and Advertising for the Low-Income Energy Assistance Program (LEAP)

05/12/2021

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SECTION I

ISSUE AND TIMELINE INFORMATION

A. ISSUING OFFICE:

This Request for Proposal (RFP) 2021000282 is issued for the State of Colorado (State) by the Department of Human Services (CDHS or Department), for the benefit of the Department through the CDHS Division of Procurement.

B. INVITATION TO SUBMIT PROPOSALS:

The State of Colorado is posting this RFP on the Colorado Vender Self Service page (Colorado VSS) so that firms that have an interest may submit a proposal in accordance with the terms of this RFP.

C. MEANS OF COMMUNICATION:

In the event that it becomes necessary to revise any part of this RFP, a modification will be published on the Colorado VSS web site at www.colorado.gov/vss. It is incumbent upon Offerors to carefully and regularly monitor Colorado VSS for any such postings.

The CDHS Division of Procurement is the SOLE point of contact concerning this RFP. **All communication for this procurement must be done through the CDHS Division of Procurement point of contact indicated in this RFP and Colorado VSS.**

D. PURPOSE:

This RFP provides prospective firms with sufficient information to enable them to prepare and submit proposals for consideration to satisfy the need for expert assistance in the completion of the goals of this RFP.

E. SCOPE:

This RFP contains the instructions governing the proposal to be submitted and the material to be included therein and other requirements to be met by each proposal.

F. SCHEDULE OF ACTIVITIES:

		Date	Time (MT)
1	RFP PUBLISHED ON COLORADO VSS WEB PAGE (www.colorado.gov/VSS)	5/12/21	
2	PROSPECTIVE FIRMS WRITTEN INQUIRY DEADLINE (NO WRITTEN QUESTIONS WILL BE ACCEPTED AFTER THIS DATE). Email Inquiries: toby.erxleben@state.co.us	5/26/21	5:00 p.m.
3	RESPONSES TO WRITTEN INQUIRIES PUBLISHED ON Colorado VSS	6/2/21	
4	PROPOSAL SUBMISSION DEADLINE See Administrative Information Section II-D for submission.	6/14/21	4:00 p.m.
5	PUBLIC OPENING	6/15/21	10:00 a.m.
6	CONTRACT PERIOD: ESTIMATED 10-01-2021 to 9-30-2022 plus four (4) one year options to renew (option of the State)		

G. BUDGET:

The budget for this RFP will not be made public until an award has been issued. The State reserves the right to increase or decrease the amount awarded based upon availability of appropriated funding.

H. TERM OF CONTRACT:

The anticipated initial term of the resulting contract is October 1, 2021 through September 30, 2022. The resulting contract may be renewed for four (4) additional one-year periods at the sole discretion of the State, contingent upon funds being appropriated, budgeted, and otherwise made available, and other contractual requirements, if applicable, being satisfied.

Section II

ADMINISTRATIVE INFORMATION

A. OFFICIAL MEANS OF COMMUNICATION: During the solicitation process for this RFP, all official communication with Offerors will be via notices on Colorado VSS. Notices may include any modifications to administrative or performance requirement, answers to inquiries received, clarifications to requirements, and the announcement of the apparent winning Offeror. ***It is incumbent upon Offerors to carefully and regularly monitor VSS for any such notices***.

B. INQUIRIES: Unless otherwise noted, prospective offerors may make written or e-mail inquiries concerning this RFP to obtain clarification of requirements. No inquiries will be accepted after the date and time indicated in the Schedule of Activities.

E-mail all inquiries to: toby.erxleben@state.co.us clearly identify your inquiries as RFP IHGA 2021000282, LEAP Marketing and Advertising.

Responses to offerors' inquiries will be published as a modification on the State of Colorado - VSS web page in a timely manner.

C. MODIFICATION OR WITHDRAWAL OF PROPOSALS: Proposals may be modified or withdrawn by the offeror prior to the established due date and time.

D. PROPOSAL SUBMISSION:

ELECTRONIC SUBMISSION:
The Colorado Department of Human Services (Department) is utilizing a new online solicitation submission application. To use this application, please send an email to the email address located below that contains your proposal as a zip folder. Please note the following:

- **The subject line and the body of the email are not uploaded into the online submission application**. Only email attachments are uploaded. Should any Vendor wish to ask a question or make a comment regarding the solicitation, the Vendor should email the procurement contact. If any comment or question is included in the email to the online submission application, the Department will not answer or address them because the Department does not receive them.
- The solicitation submission application typically uploads proposals within five minutes. The Vendor should submit proposals thirty minutes prior to the solicitation deadline to ensure the proposal was validly received.
- The application sends an email confirmation if the proposal was uploaded correctly.
- All inquiries, questions, comments, or concerns should be submitted to the procurement contact, not through the solicitation submission application. This includes questions asked during the Questions and Answers period.

- Vendors should submit one zip folder that contains all proposal submission documents. The zip folder name should start with the solicitation type, solicitation number, and vendor name (e.g., "CDHS RFP IHGA 2021000282"). The vendor may include additional information in the folder title.
- The solicitation submission application is only for proposal submission. All other communications, including the Notice of Intent to Award will be posted on the Colorado Vendor Self-Service Website and/or through a direct email from the procurement contact.
- **Please do not encrypt your email.** The e-submission program automatically encrypts attachments, and the Department has experienced errors with emails encrypted by vendors.

Proposals shall be emailed to: TE_RFP_.yt9eevn75hty4bg7@u.box.com

Proposals must be received on or before the date and time indicated in the Schedule of Activities. Late proposals will not be accepted. It is the responsibility of the offeror to ensure that the proposal is received by the Division of Procurement on or before the proposal opening date and time.

The State of Colorado Request for Proposal Signature Page MUST be signed in (preferably blue) ink by the offeror or an officer of the offeror legally authorized to bind the offeror to the proposal.

Proposals which are determined to be at a variance with this requirement may not be accepted.

PUBLIC OPENING: On the date and time shown in the VSS Portal, the Division of Procurement will hold a Public Opening of Proposals. The Public Opening will disclose only the names of all Offerors who have submitted a proposal for evaluation by DHS. Information on costs and qualifications will be available from the Division of Procurement following selection of the winning Offeror. All vendors must notify the Division of Procurement if they wish to attend at least one day prior to Public Opening of Proposals.

E. PROPOSAL NARRATIVE LENGTH AND PAGE FORMATTING

The Division of Procurement desires and encourages that proposals be submitted on recycled paper, printed on both sides. While the appearance of proposals and professional presentation is important, for physical submissions, the use of non-recyclable or non-recycled glossy paper is discouraged.

Applicants should adhere to the following length and page formatting instructions.

Total proposal Length:	Maximum of fifteen (15) pages
Font:	Times New Roman twelve (12) point
Spacing:	Double or single
Margins:	One (1) inch margins on all sides
Paper:	8 ½ X 11

Header: Applicant Name
Footer: Page number

All acronyms in the proposal must be defined.

F. ADDENDUM OR SUPPLEMENT TO REQUEST FOR PROPOSAL:
In the event that it becomes necessary to revise any part of this RFP, an addendum/amendment will be published on the Colorado-VSS web site. It is incumbent upon offerors to carefully and regularly monitor VSS for any such postings. It is the offeror's responsibility to make known to the Division of Procurement its interest in any addendum/amendment if it has received the RFP in a direct mailing from the Division of Procurement and no addendum has been received by mail.

G. ORAL PRESENTATIONS/SITE VISITS:
At the conclusion of evaluation and discussion of the written proposals, the State may (at the evaluation committee's sole discretion) request an oral presentation of the most favorable proposals. *Offeror should not, however, prepare the written proposal with the assumption that an opportunity for oral presentations or revisions will be offered; rather, the most favorable proposal should be submitted as their initial written submittal.*

Should the evaluation committee decide not to award solely based on initial proposals, then those proposals in the competitive range (those most responsive to the requirements and reasonably susceptible of being selected for award) will have an opportunity to make an oral presentation. The oral presentation may include a discussion for the purpose of clarification and to ensure full understanding of and responsiveness to solicitation requirements. The same criteria for evaluation will be employed and each committee member will be provided the opportunity to modify their original evaluation. Following all oral presentations, the committee will again discuss their individual evaluations.
If the evaluation committee requires such presentations, the State will schedule these sessions for the purpose of:

- Allowing the Offeror an opportunity to present its proposal to the evaluation committee;
- Allowing the Offeror an opportunity to demonstrate its background and capabilities in providing the requested services;
- Allowing the State an opportunity to obtain further clarification of proposal aspects and attempt to resolve any uncertainties;
- Resolving suspected mistakes by calling such perceived errors to Offeror's attention without disclosing information concerning other Offerors' proposals; and
- Allowing the State an opportunity to ask specific questions of the Offeror regarding its proposal offer.

Any presentations and/or site visits will be at the offeror's expense.

H. ACCEPTANCE OF RFP TERMS: A proposal submitted in response to this RFP shall constitute a binding offer. Acknowledgment of this condition shall be indicated by

the autographic signature of the offeror or an officer of the offeror legally authorized to execute contractual obligations. It is assumed by the offeror's response that it acknowledges all terms and conditions of this invitation for an offer. An offeror shall identify clearly and thoroughly any variations between its proposal and the State's RFP. Failure to do so shall be deemed a waiver of any rights to subsequently modify the terms of performance, except as outlined or specified in the RFP.

I. PROTESTED SOLICITATIONS AND AWARDS: Any actual or prospective offeror or contractor who is aggrieved in connection with the solicitation or award of a contract may protest to Chris Frenz, Procurement Director, christopher.frenz@state.co.us. The protest shall be submitted in writing within ten working days after such aggrieved person knows, or should have known, of the facts giving rise thereto. Reference C.R.S. Title 24, Article 109.

J. CONFIDENTIAL/PROPRIETARY INFORMATION: Any restrictions of the use or inspection of material contained within the proposal shall be requested prior to the submission of the proposal itself. Written requests for confidentiality shall be submitted, by the offeror prior to the proposal submission date. The offeror must state specifically what elements of the proposal that would be considered confidential/proprietary. The Division of Procurement will make a written determination as to the apparent validity of any written request for confidentiality, the written determination will be sent to the offeror.

Requests that are granted shall use the following format:

- Confidential/proprietary information must be readily identified marked and separated/packaged from the rest of the proposal.
- Co-mingling of confidential/proprietary and other information is NOT acceptable. Neither a proposal, in its entirety, nor proposal price information will be considered confidential and proprietary.
- Any information that will be included in any resulting contract cannot be considered confidential.

After award, the offers shall be open to public inspection subject to any continued prohibition on the disclosure of confidential data, C.R.S. Title 24, Article 72, Part 2 as amended.

K. RFP RESPONSE MATERIAL OWNERSHIP: All material submitted regarding this RFP becomes the property of the State of Colorado. Proposals may be reviewed by any person after the "Notice of Intent to Make an Award" letter has been issued, subject to the terms of C.R.S. Title 24, Article 72, Part 2 as amended.

L. PROPOSAL PRICES: Estimated proposal prices are not acceptable. Best and final offers may be considered in determining the apparent successful offeror. Proposals shall be firm for a period of not less than One hundred eighty (180) calendar days from the date of award.

M. EVALUATION: The evaluation will identify the proposals that most effectively meet the requirements of this RFP. The work will be offered to the Offerors whose proposals, conforming to the RFP, will be most advantageous to the State of Colorado, price and other factors considered.

The State of Colorado will conduct a comprehensive, fair and impartial evaluation of each proposal received. First, all proposals will be submitted to the Division of Procurement for acceptance. The Division of Procurement will be responsible for ensuring that:

- The Offeror's proposal complied with the due date and time.
- The Offeror's "Colorado Request for Proposal Signature Page" meets content and other requirements.
- The Offeror included the appropriate number of proposal copies.

Evaluation Process:
The Department plans an intensive, thorough, complete and fair evaluation process. Proposals will be evaluated on both the proposed service and the cost of the service. The evaluation will be performed and an award recommendation made to the Division of Procurement by the Evaluation Committee. Evaluation Committee Members will be selected who do not have a conflict of interest in this procurement.
The Evaluation Committee will be responsible for the evaluation process that will include the following steps:

- Review proposals for any conditions that may disqualify the Offeror and to ensure that required terms and conditions have been met.
- Review proposal content, contact references and assign a preliminary score to each factor for each proposal.
- Determine whether, as part of the deliberations, any Offerors will be invited to participate in discussions with the Committee. (Offerors would be those who, based on preliminary scores, are reasonably susceptible of being selected for the award.) However, proposals may be reviewed and determinations made without discussion. Therefore, it is important that proposals be complete, and Offerors should recognize that opportunity for further explanation may not exist.
- Oral presentations, if required, for invited offerors to demonstrate their proposed service.
- Adjust points or ratings as necessary.
- Best and final offers may take place at the State's option.
- Make final selection recommendation to the Division of Procurement.

N. PROPOSAL SELECTION: Upon review and approval of the evaluation committee's recommendation for award, the Division of Procurement will issue a "Notice of Intent to Award" on Colorado-VSS. A notice will be sent to all offeror's indicating the notice of intent has been posted. A contract will be completed and signed by all parties concerned on or before the date indicated in the Schedule of Activities. If this date is not met, through no fault of the State, the State, at its sole discretion, may elect to cancel the "Notice of Intent to Award" notice and make the award to the next most advantageous

offeror.

O. AWARD OF CONTRACT: The award will be made to offeror(s) whose proposal, conforming to the RFP, will be the most advantageous to the State of Colorado, price and other factors considered.

P. PROPOSAL CONTENT ACCEPTANCE: The contents of the proposal (including persons specified to implement the project) of the successful offeror will become contractual obligations if acquisition action ensues. Failure of the successful offeror to accept these obligations in a contract, purchase document, delivery order or similar acquisition instrument may result in cancellation of the award and such offeror may be removed from future solicitations.

Q. STANDARD CONTRACT: After award and before Contract execution the successful Offeror must be registered to do business in the State of Colorado. This registration is maintained through the Colorado Secretary of State Office. (http://www.sos.state.co.us/) If Offeror is a foreign corporation (formed under a statute or common law in a jurisdiction other than Colorado) or other foreign entity transacting business in the State of Colorado, shall warrant that it currently has obtained and shall maintain any applicable certificate of authority to transact business in the State of Colorado and has designated a registered agent in Colorado to accept service of process.

Except as modified herein, the standard State Contract Terms and Conditions and the Sample Model Contract (attached separately on VSS as Exhibit A) included in this RFP shall govern this procurement and are hereby incorporated by reference. Please note this Model Contract lists the State's required legal provisions <u>but does not include the specific scope of work and requirements for this RFP</u>. This SOW and other specifics will be attached to the awarded offeror's contract as an exhibit.

The Offeror is expected to review the attached Model Contract and note exceptions. Offerors agreeing to abide by the requirements of the RFP are also agreeing to abide by the terms of the Model Contract. Unless the Offeror notes exceptions in its proposal, the conditions of the Model Contract will govern. It may be possible to negotiate some of the wording in the final contract; however, there are many provisions, (such as those contained in the Special Provisions pages) which cannot be changed. Offerors are cautioned that the State believes modifications to the standard provisions, terms and conditions, and Special Provisions constitute increased risk to the State and increased costs. Therefore, the scope of requested exceptions is considered in the evaluation of proposals.

R. RFP CANCELLATION: The State reserves the right to cancel this Request for Proposal at any time, without penalty.

S. STATE OWNERSHIP OF CONTRACT PRODUCTS/SERVICES:
Proposals upon established opening time become the property of the State of Colorado. All products/services produced in response to the contract resulting from this RFP will be

the sole property of the State of Colorado, unless otherwise noted in the RFP. The contents of the successful offeror's proposal will become contractual obligations.

The State of Colorado has the right to retain the original proposal and other RFP response materials for our files. As such, the State of Colorado may retain or dispose of all copies as is lawfully deemed appropriate. Proposal materials may be reviewed by any person after the "Notice of Intent to Make an Award" letter(s) has/have been issued, subject to the terms of Section 24-72-201 et seq., C.R.S., as amended, Public (open) Records. The State of Colorado has the right to use any or all information/material presented in reply to the RFP, subject to limitations outlined in the clause, Proprietary/Confidential Information. Offeror expressly agrees that the State may use the materials for all lawful State purposes, including the right to reproduce copies of the material submitted for purposes of evaluation, and to make the information available to the public in accordance with the provisions of the Public Records Act.

T. INCURRING COSTS: The State of Colorado is not liable for any cost incurred by offerors prior to issuance of a legally executed contract or procurement document. No property interest, of any nature shall occur until a contract is awarded and signed by all concerned parties.

U. PROPOSAL REJECTION: The State of Colorado reserves the right to reject any or all proposals and to waive informalities and minor irregularities in proposals received and to accept any portion of a proposal or all items proposed if deemed in the best interest of the State of Colorado.

V. VENDOR IDENTIFICATION: The tax identification number provided must be that of the offeror responding to the RFP. The offeror must be a legal entity with the legal right to contract.

W. NEWS RELEASES: News releases pertaining to this RFP shall NOT be made prior to execution of the contract without prior written approval by the State.

X. CERTIFICATION OF INDEPENDENT PRICE DETERMINATION:

1. By submission of this proposal each offeror certifies, and in the case of a joint proposal each party, thereto certifies as to its own organization, that in connection with this procurement:
    a. The prices in this proposal have been arrived at independently, without consultation, communication, or agreement, for the purpose of restricting competition, as to any matter relating to such prices with any other offeror or with any competitor;
    b. Unless otherwise required by law, the prices which have been quoted in this proposal have not been knowingly disclosed by the offeror and will not knowingly be disclosed by the offeror prior to opening, directly or indirectly to any other offeror or to any competitor; and
    c. No attempt has been made or will be made by the offeror to induce any

other person or firm to submit or not to submit a proposal for the purpose of restricting competition.

2. Each person signing the Request for Proposal Signature Page of this proposal certifies that: They are the person in the offeror's organization responsible within that organization for the decision as to the prices being offered herein and that they have not participated, and will not participate, in any action contrary to (1)(a) through (1)(c) above; or they are not the person in the offeror's organization responsible within that organization for the decision as to the prices being offered herein but that they have been authorized in writing to act as agent for the persons responsible for such decision in certifying that such persons have not participated, and will not participate, in any action contrary to (1)(a) through (1)(c) above, and as their agent does hereby so certify; and they have not participated, and will not participate, in any action contrary to (1)(a) through (1)(c) above.

3. A proposal will not be considered for award where (1)(a), (1)(c), or (2) above has been deleted or modified. Where (1)(b) above has been deleted or modified, the proposal will not be considered for award unless the offeror furnishes with the proposal a signed statement which sets forth in detail the circumstances of the disclosure and the head of the agency, or their designee, determines that such disclosure was not made for the purpose of restricting competition.

Y. CONFLICTS OF INTEREST: The holding of public office or employment is a public trust. A public officer or employee whose conduct departs from his fiduciary duty is liable to the people of the State. Rules of conduct for public officers and state employees:

1. Proof beyond a reasonable doubt of commission of any act enumerated in this section is proof that the actor has breached his fiduciary duty.
2. A public officer or a state employee shall not:
   a. Engage in a substantial financial transaction for their private business purposes with a person whom they inspect, regulate, or supervises in the course of their official duties;
   b. Assist any person for a fee or other compensation in obtaining any contract, claim, license, or other economic benefit from their agency;
   c. Assist any person for a contingent fee in obtaining any contract, claim, license, or other economic benefit from any state agency; or
   d. Perform an official act directly and substantially affecting its economic benefit a business or other undertaking in which they either have a substantial financial interest or is engaged as counsel, consultant, representative, or agent.
   e. Serve on the Board of any entity without disclosure to the entity, the Secretary of State, and their employer.

3. A head of a principal department or a member of a quasi-judicial or rule-making agency may perform an official act notwithstanding paragraph (d) of subsection (2) of this section if their participation is necessary to the administration of a statute and if they

comply with the voluntary disclosure procedures under C.R.S. 24-18-110.

4. Paragraph (c) of subsection (2) of this section does not apply to a member of a board, commission, council, or committee if they comply with the voluntary disclosure procedures under C.R.S. 24-18-110 and if they are not a full-time state employee. Reference C.R.S. 24-18-108, as amended.

Z. TAXES: The State of Colorado, as purchaser, is exempt from all federal excise taxes under Chapter 32 of the Internal Revenue Code (Registration No. 84-730123K) and from all state and local government use taxes C.R.S. 39-26-114(a). Our Colorado State and Local Sales Tax Exemption Number is 98-02565. Seller is hereby notified that when materials are purchased in certain political sub-divisions (for example - City of Denver), the seller may be required to pay sales tax even though the ultimate product or service is provided to the State of Colorado. This sales tax will not be reimbursed by the State.

AA. PUBLIC CONTRACTS FOR SERVICES. CRS 8-17.5-101 (EXCLUDED; SECURITIES, INVESTMENT ADVISORY SERVICES OR FUND MANAGEMENT, SPONSORED PROJECTS, INTERGOVERNMENTAL AGREEMENTS, OR INFORMATION TECHNOLOGY SERVICES OR PRODUCTS AND SERVICES).

Effective May 13, 2008, contractors who enter into or renew a public contract for services with Colorado state agencies or political subdivisions must participate in either the Federal ***E-Verify program,*** or the Colorado Department of Labor and Employment Program. For more information see:

E-Verify Program: http://www.dhs.gov/e-verify or,

Colorado Department of Labor and Employment Program and notice forms: Division of Labor: http://www.colorado.gov/cs/Satellite/CDLE-LaborLaws/CDLE/1248095356380

BB. CRS 24-102-206 Contract Performance for Services Outside US or CO - Now requires Contractors to give written notice in accordance with the following State Contract terms and conditions:

If any services are performed outside the United States or Colorado:
[Not applicable if Contract Funds include any federal funds]
Prior to contracting or as a requirement for the solicitation of any contract from the state for services, as appropriate, any prospective vendor shall disclose in a written statement of work whether it anticipates subcontracting any services under the contract, where such subcontracted services will be performed under the contract, including any subcontracts, and whether any subcontracted services under the contract or any subcontracts are anticipated to be performed outside the United States or the state. If the prospective vendor anticipates services under the contract or any subcontracts will be performed outside the United States or the state, the vendor shall provide in its written statement of work a provision setting forth why it is necessary or advantageous to go outside the United States or the state to perform the contract or any subcontracts.

Following the Contract Effective Date, Contractor shall provide written notice to the State, within 20 days of the earlier to occur of Contractor's decision to perform, or its execution of an agreement with a Subcontractor to perform, Services outside the State of Colorado and/or the United States. Such notice shall specify the type of Services to be performed outside the State of Colorado and/or the United States and the reason why it is necessary or advantageous to perform such Services at such location or locations. All notices received by the State shall be posted on the Colorado Department of Personnel & Administration's website. Knowing failure by Contractor to provide notice to the State shall constitute a material breach of this Contract.

Noncompliance
Contractor's failure to provide reports and notify the State in a timely manner may result in the delay of payment of funds and/or termination as provided under this Contract.

Subcontracts
Copies of any and all subcontracts entered into by Contractor to perform its obligations hereunder shall be submitted to the State or its principal representative upon request by the State. Any and all subcontracts entered into by Contractor related to its performance hereunder shall comply with all applicable federal and state laws and shall provide that such subcontracts be governed by the laws of the State of Colorado.

SECTION III

BACKGROUND, OVERVIEW AND GOALS

A. BACKGROUND

Colorado's Low-Income Energy Assistance Program (LEAP) is a federally funded program that helps eligible Coloradans meet their winter home heating costs, weatherize their homes, and repair or replace the home's primary heating system.

LEAP is administered by the Colorado Department of Human Services, Office of Economic Security, Division of Food and Energy Assistance with funds awarded by the U.S. Department of Human Services, Administration of Children and Families, Office of Community Services. LEAP is a seasonal program that typically operates annually from November 1st through April 30th, though season extensions are possible.

The core components of LEAP are as follows:

1. Home heating bill assistance payments made to utility companies on behalf of eligible households, or, in a minority of cases, directly to the household. Households who do not qualify for LEAP or need additional heating bill assistance are referred to Energy Outreach Colorado.
2. Crisis Intervention Program (CIP): Furnace repair and replacement for LEAP households in heat-related emergencies. This program is administered by Energy Outreach Colorado.
3. Weatherization Assistance Program (WAP): Administered by the Colorado Energy Office, WAP partners with local weatherization agencies to provide free weatherization services to Coloradans. LEAP eligible households automatically qualify for weatherization services, pending the results of the home energy audit.

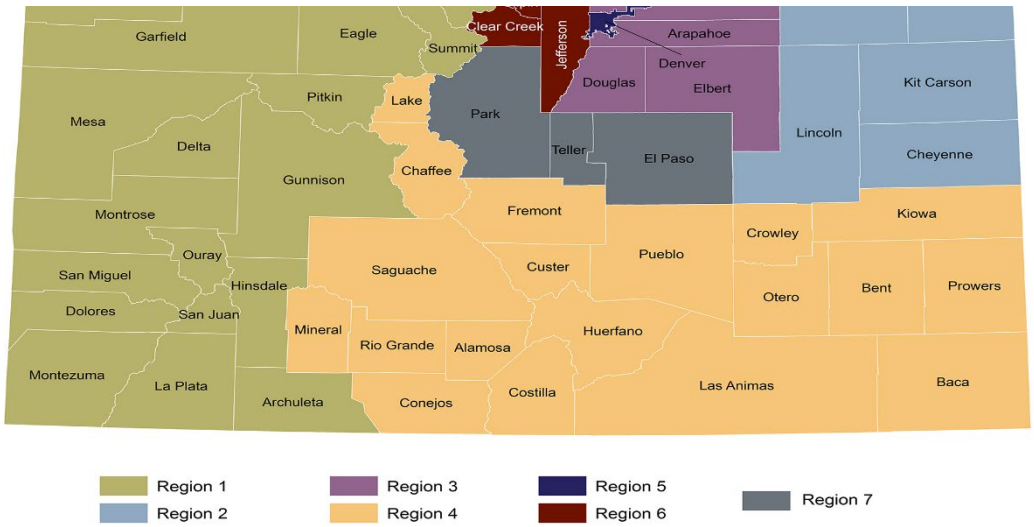
For additional information, please visit the LEAP website at https://cdhs.colorado.gov/leap.

B. OVERVIEW

Many Coloradans struggle to pay their heating bills, especially during winter, thus LEAP seeks to provide home heating assistance to as many eligible Coloradans as possible as quickly as possible. This need for heating assistance has been exacerbated by the effects of the COVID-19 pandemic. Heating arrearages have reached unprecedented levels. In addition to the underserved communities that were already struggling, many Colorado households have experienced unexpected job loss and, as a result, are eligible for heating assistance for the first time. Because of this widespread need, LEAP must conduct all-inclusive promotional campaigns to notify Coloradans of the availability of heating assistance and advise them how to access it.

LEAP is designed to offer maximum access to services for individuals in throughout the

following seven Regions:



Geographic Service Region	Counties
Region 1	Archuleta, Delta, Dolores, Eagle, Garfield, Grand, Gunnison, Hinsdale, Jackson, La Plata, Larimer, Mesa, Moffat, Montezuma, Montrose, Ouray, Pitkin, Rio Blanco, Routt, San Juan, San Miguel, Summit
Region 2	Cheyenne, Kit Carson, Lincoln, Logan, Morgan, Phillips, Sedgwick, Washington, Weld, Yuma
Region 3	Adams, Arapahoe, Douglas, Elbert
Region 4	Alamosa, Baca, Bent, Chaffee, Conejos, Costilla, Crowley, Custer, Fremont, Huerfano, Kiowa, Lake, Las Animas, Mineral, Otero, Prowers, Pueblo, Rio Grande, Saguache,
Region 5	Denver
Region 6	Boulder, Broomfield, Clear Creek, Gilpin, Jefferson
Region 7	El Paso, Park, Teller

C. GOALS

The goal of this RFP is to obtain competitive bid proposals from entities (Offerors) to develop and execute a comprehensive and statewide marketing and advertising strategy and provide brand strategy for the Colorado Low-Income Energy Assistance Program that takes into account and builds upon the current strategy. The Offeror should consider and build upon the existing marketing plan and promote LEAP.

The Offeror shall gather extensive knowledge of LEAP current branding, services, industry, and partners to ensure overall modification, transition and success of the new

marketing programs to be implemented. The Offeror shall ensure growth and development of LEAP utilization through marketing/advertising services.

The objectives of the marketing and advertising campaign are:

1. Target audience identification - Identify eligible Coloradans who are unaware of the availability of LEAP assistance or how to apply.
2. In collaboration with CDHS staff, create a marketing and advertising plan that promotes awareness, understanding and availability, and encourages participation in LEAP for all Colorado residents.
3. Manage outreach to target audiences through a variety of channels and multiple languages (English and Spanish at minimum), including but not limited to social media, online advertisements, traditional newspaper and radio advertisements, news stories, TV advertising, and bus ads.
4. Develop content, including but not limited to advertisements, brochures, posters, online content, and talking points consistent with outreach goals.
5. Promote all the ways that Coloradans can apply for LEAP, including online, with the help of their local county office, and over the phone.
6. Reduce the stigma associated with public benefit programs such as LEAP.
7. Create KPIs, in coordination with CDHS staff, and report back on results of promotion efforts.

SECTION IV

REQUIREMENTS / STATEMENT OF WORK

Restate each requirement as set forth in this Section IV, followed by a response describing the approach and how the requirement will be met. Indicate in detail, the scope of services included in your proposal and identify any items requested by the State that are not included in your proposal.

The selected contractor will be responsible for designing a statewide advertising campaign targeted toward LEAP-eligible Coloradans, and completing the following tasks, in collaboration with CDHS staff:

Marketing Strategy

1. Offeror shall prepare an annual marketing and media strategic plan to include all of the activities listed below. If changes need to be made to the plan, Offeror shall present any updates or refinements to the final strategy and tactical plan to CDHS/LEAP.
2. Offeror shall negotiate and procure final media placements (advertising time and/or space), including added value, based on the approved media plan.
3. Offeror shall draft media communications briefs, creative briefs and production requests by outlining the project scope, deliverables, strategic objectives, budgets and timelines.
4. Offeror shall support any efforts to create and approve a new or improved logo for LEAP.
5. Offeror shall recommend, design and produce collateral and promotional materials including but not limited to: brochures, posters, and flyers.
6. Offeror shall develop and execute social media programs that connect with target audiences in accordance with the overall brand strategy.
7. Offeror shall manage and respond to all social media comments as appropriate and shall send all negative comments to LEAP staff.
8. Offeror shall utilize digital and social media including social media influencers.
9. Offeror shall engage in marketing tactics that may include, but are not limited to:
    - Collateral and promotional materials such as brochures, posters, and flyers.
    - Digital Display Advertising
    - Out-of-Home Advertising
    - Paid Search / Pay-Per-Click
    - Print
    - Radio
    - Social Media
    - Television / Video
10. Offeror shall analyze and report to CDHS/LEAP detailed data such as demographics, socio-economics and geographic market to achieve a comprehensive marketing strategy.

Research

1. Offeror shall work with CDHS/LEAP to identify targeted populations and deliver marketing messaging appropriately.
2. Analysis of the optimum combinations of advertising methods, timing, and placement to achieve maximum effectiveness in promoting LEAP participation.
3. Offeror shall conduct message testing activities to ensure that collateral materials are relevant and effective with the target audience.
4. Offeror shall research and analyze all paid, earned and owned media opportunities and channels to determine the most effective way to reach our target audience(s) and geographical target markets.
5. All materials and concepts belong to CDHS/LEAP.

Staffing

1. Offeror shall develop a minimum staffing plan that includes a Contract Manager responsible for ensuring program compliance and contractual oversight.
2. Offeror shall develop a contingency staffing plan, to account for personnel changes, dismissals, etc.

CDHS/LEAP Clearance and Approval Processes

1. All press releases and media relations related to this contract shall be pre-approved by the State prior to release and follow the press release protocol that may include: press release packets, talking points, and other marketing materials as specified by the State.
2. Offeror shall deliver batched marketing materials for State approval prior to targeted use date.
3. Offeror shall be notified by LEAP of any projects that require approval from the Governor's Office and the submission timeline for review and approval necessary to meet the targeted use date.
4. Offeror shall notify the designated LEAP contact via email with details and plans to address the problem in the event marketing deadlines cannot be met.
5. Offeror shall send all media requests related to LEAP to the CDHS/LEAP point of contact to receive direction prior to response.

Analytics Tracking and Process Measures

1. Offeror shall measure success to include but not limited to website analytics, surveys capturing brand awareness, earned media, total impressions by tactic, click through rate, number of clicks, video completion rate, use of the hotline (text, chat, and call), and public use of LEAP services.
2. Offeror shall work with CDHS/LEAP to determine reasonable goals and key performance indicators.
3. Offeror shall prepare and submit a Monthly Campaign Analytics Report to CDHS/LEAP which shall include an overview of the analytics, a progress to goal comparison, and any additional items requested by CDHS/LEAP.

4. Prepare and submit a final report to designated to LEAP staff summarizing the results of the advertising initiative including by June 30th each year for the duration of the contract. At a minimum, the report must include:
    - Impact of all paid, earned, shared and owned efforts, including but not limited to print, TV, radio, and online mentions, ad value, and reach.
    - Reach, Impressions, Clicks, Views from Digital Ad Campaigns
    - Month-over-month and year-over-year comparisons off all aforementioned metrics as applicable

Fiscal Management

1. Offeror shall develop accurate production estimates, budgets, and procure broadcast, printing, art and other production services at the best quality and price.
2. Offeror shall provide staff positions and rates for personnel on an annual basis that are subject to approval by the State.
3. Offeror shall review media contract and agreement details with LEAP and keep all contracts and subcontracts on file to support invoicing and provide to CDHS/LEAP upon request.
4. Offeror shall develop and track staffing assigned to this contract and other programs for invoice support (time and effort reporting) to ensure staff time for other projects are not paid by this contract.

SECTION V

RESPONSE FORMAT

To facilitate an effective evaluation process, proposals must be submitted in the following format on 8 1/2 by 11-inch paper and all pages should be numbered in the following manner: page____ of ____ pages. Please use double-sided pages. All acronyms in the proposal must be defined. Failure to provide the requested information may result in disqualification of the proposal. ***Proposals that do not follow the sequence, outline, and response format of this RFP, may be deemed non responsive and disqualified from further consideration.***

A. STATE OF COLORADO REQUEST FOR PROPOSAL SIGNATURE PAGE

Include the State of Colorado Request for Proposal Signature Page. An officer of the offeror who is legally authorized to bind the offeror to the proposal must sign this page in ink.

B. TRANSMITTAL LETTER

Submit a Transmittal Letter on your official business letterhead that:

1. Positively states your willingness to comply with all work requirements and other terms and conditions as specified in this RFP.
2. Identifies all material and attachments that comprise your proposal.
3. Is signed by an individual authorized to commit your organization to the proposed work.
4. States whether the Offeror is a partnership, a non-profit corporation, a Colorado corporation, a non-Colorado corporation, or some other business structure. Non-Colorado corporations must register as a foreign corporation to conduct business in Colorado and appoint a resident agent to review process. If the Offeror is a foreign corporation, a limited liability partnership or a limited liability limited partnership, state that the Offeror currently has a Certificate of Good Standing or Certificate of Existence to do business in Colorado. Proof of such certification shall be provided upon request.
5. States whether the Offeror or any of the Offeror's employees, agents, independent Contractors, or proposed subcontractors have ever been an excluded provider, convicted of any criminal charges or actions involving moral turpitude. If yes, attach an explanation.
6. States that the Offeror’s Proposal shall remain valid for a minimum of one hundred eighty (180) days from the date of the award.
7. Discloses all current pending contracts with the State of Colorado and all bids or proposals submitted to the State of Colorado but not yet awarded.
8. Identifies all potential conflicts of interest related to this RFP. If any actual or potential conflicts of interest are identified, provide your plan to mitigate the actual or potential conflict of interest.
9. Vendor disclosure of services identifies if the vendor or subcontractor will perform the services outside the state of Colorado or United States. If this is the case, provide a brief statement explaining why the vendor believes it is necessary or

advantageous to perform the services outside the state of Colorado or United States. Contracts entered into or renewed by a government entity are subject to the following statute(s) under HB 13-1292 “Keep Jobs in Colorado Act of 2013”.

10. Service-Disabled Veteran Owned Small Businesses (SDVOSBs) – Per C.R.S. 24-103-905. Vendors who are officially registered and verified as a SDVOSB by the Center for Veteran Enterprise within the U.S. Department of Veterans Affairs. (www.vip.vetbiz.gov) should disclose this information. SDVOSBs making this claim shall submit documentation of SDVOSB certification issued through the U.S. Department of Veterans Affairs in their response to the solicitation. Bid submissions without this documentation will not be considered a SDVOSB.

C. TECHNICAL/ BUSINESS PROPOSAL

Restate each requirement set forth in Section 4, Requirements/Statement of Work, followed by a response describing the approach and how the requirement will be met. Identify the Section number of each requirement. Indicate in detail the scope of services included in your proposal and identify any items requested by the State that are not included in your proposal.

Include a risk assessment and how your firm proposes to minimize those risks including vendor self-assessment and quality control for a successful engagement meeting the goals and expected outcomes described in this RFP and RFP proposal response.

D. DEMONSTRATED EXPERIENCE AND CAPABILITIES

Demonstrate the organization’s ability for the following requirements (the following information will not count towards page maximum):

1. Provide company information such as:
   a. Company history, website information and any other information deemed relevant to the company.
   b. Organizational charts of essential staff.
   c. A list of relevant projects that the firm currently has on hand.

2. Indicate key personnel who will be assigned to the project and describe their experience. CDHS expects that the awarded vendor will continue to make the key project personnel available through the life of the contract as long as they remain in the Proposer's employ. If key personnel are no longer available, backup personnel with equally qualified credentials will be required. CDHS reserves the right to approve any replacement personnel.

3. Describe your firm’s experience with similar projects. Submit at least one (1) client reference for each project for a maximum of two (2) projects within the past ten (5) years. References may or may not be contacted any time during the solicitation process.

E. COST PROPOSAL

Proposals must include a budget which reflects the funds requested to provide the required services. In particular:

a. Costs must be tied to services that meet or exceed the requirements and expected outcomes.

b. Costs must describe expenses and necessity.

c. Costs must be associated with personnel activities and program development work.

Note: This RFP will result in a fixed-price or NOT TO EXCEED contract. Costs will be tied to services that meet or exceed the requirements and expected outcomes. This may include the expertise, and relevant experience of the offeror that will enhance the success of the project and provide minimal risk or need for State resources. The proposal must state the cost for performance of and completion of services that will become part of a contract between the State and the awarded vendor.

F. ADDITIONAL DATA

Since the preceding sections are to contain information that is specifically requested, the firm may include any additional information considered essential to the proposal in this section. The firm should not include general information publications, such as marketing, directories or client lists.

G. STATE RESPONSIBILITIES

The Department will appoint an individual to be a liaison to the successful Offeror. This individual will attend entrance/exit conferences and assist the firm in understanding Department requirements and reporting guidelines.

SECTION VI

EVALUATION AND AWARD

A. EVALUATION OF PROPOSALS

The award decision ultimately is a business judgment that will reflect an integrated assessment of the relative merits of the proposals using the factors set forth in the RFP. The Department intends to award the contract to the Offeror whose proposal, conforming to the RFP, will be most advantageous to the Department, price and other factors considered.

The Department will conduct a comprehensive, fair, and impartial evaluation of the proposals received in this solicitation effort. A Proposal Evaluation will evaluate Proposals that meet the minimum general requirements. Evaluation criteria for the proposals will be used for the purpose of ranking the proposals in a relative position based on how fully each proposal meets the requirements of this RFP. Such ranking will not necessarily be conclusive in selection of a prospective Contractor but will be evaluated with other information that may come to the attention of the State, and may, in their judgment, impact the prospective Contractor's ability to perform the services.

Offerors should not assume that they would have an opportunity for oral presentations or revisions of proposals. Therefore, Offerors should submit their most favorable proposal as their initial proposal. If an award is not made based on the initial proposals, Offerors considered most competitive may be provided an opportunity to make an oral presentation. The competitive range determination will be based exclusively on the written proposals. Offerors are therefore cautioned to ensure that their proposals adequately convey a sound approach and a comprehensive understanding of the scope of work requirements. If proposal revisions are permitted after the conclusion of oral presentations and discussions, the Department will establish a date, in writing, for submission of best and final offers. The purpose of this step would be to submit revisions only, not to submit comprehensive proposal rewrites.

B. SUBMISSION CHECKLIST

Proposals that have met the minimum submission requirements outlined in this RFP will be passed on to the evaluation review committee for further review and consideration.

At a minimum, proposals are:

1. Submitted by the due date and time.
2. Completed and Signed Signature Page
3. Completed and Signed Transmittal Letter
4. Organized, Tabbed and formatted per instructions contained within the RFP and all other documents considered to be a part of the RFP.
5. Packaging instructions and designated number of copies.

Proposals that do not meet the criteria of the Submission Checklist and initial review may be disqualified.

C. GENERAL CRITERIA

Proposals will be evaluated and scored in the following categories detailed in this RFP. Proposals must meet or exceed the following requirements:

Category 1 – Organizational Structure, Demonstrated Experience and Capabilities

- There is breadth and depth of relevant experience to design, implement, and manage an effective marketing and advertising campaign and outreach.
- Qualifications and experience of staff, including specialists and consultants to be assigned to the project, are sufficient to minimize risk and allow for the greatest potential for meeting or exceeding goals and outcomes.

Category 2 –Technical Requirements/Proposed Solution Plan

- Application components are appropriate, complete and clearly articulated.
- Organizational goals are defined, appropriate and are aligned with project requirements.
- Strategy and implementation plan appears reasonable and accomplishable.
- Performance measures and outcomes are sufficient for the activities.

Category 3 – Cost Proposal

- Costs are tied to services that meet or exceed the requirements and expected outcomes.
- Costs describe expenses and necessity.
- Costs are associated with personnel activities and program development work.

D. BASIS FOR AWARD

The business and technical factors will be assessed based on the soundness of the Offeror's overall approach and the Respondent's understanding of the requirements. The experience and/or demonstrated capabilities factor will be assessed by considering the extent to which the qualifications, experience and past performance are likely to foster successful, on-time performance. Strategies for meeting expedited implementation timeframes will be assessed based on their reasonable likelihood of success. Assessments may include a judgment concerning the potential risk of unsuccessful or untimely performance, and the anticipated amount of State involvement necessary (beyond that reasonably necessary) to ensure timely, successful performance.

The State may contact client references provided, and in addition, obtain information concerning the Offeror's performance on other work performed for the State of Colorado. Client references will be used as a verification of information provided by the Offeror and as a means to validate the performance of the Offeror on prior work and will have a bearing on the scoring of Proposals. The State cannot assume any liability for statements made by client references provided by Offerors.

The Offeror recommended for an award must provide (upon request) documentation of financial responsibility, financial stability, and sufficient financial resources to provide the services sought in this RFP. This response must include financial information by which the State may reasonably formulate an opinion about the relative stability and financial strength of the Offeror and a credit rating by a rating service. These statements shall include at least a balance sheet and income statement (including footnotes). These statements must be certified by a certified public accountant (CPA).

The State may disqualify from consideration any Offeror who is involved in bankruptcy proceedings or whose financial condition is deemed to pose a risk to the State for successful performance of the contract.

E. PERFORMANCE OF AWARD

Proposed changes or exceptions to any requirement, or State's Contract Terms and Conditions (Exhibit D), may disqualify Offeror's proposal response from consideration. A completed contract is expected within 30 days following the letter of intent to award. In the event a contract is not signed (through no fault of the State) by the awarded Offeror within 30 days and barring any protest that may delay the completion of a contract, the State may elect to cease negotiations, withdraw the award, and award to the next most advantageous Offeror.