



## **REQUEST FOR PROPOSALS**

### **Graphic Design and Marketing Services**

**RFP # 18/19 CIRM 144**

**July 2, 2018**

The California Institute for Regenerative Medicine (CIRM) seeks an outstanding firm specializing in graphic design and marketing. Full details are provided in this Request for Proposals.

If you have questions about the process for submitting a proposal, contact:

Sheila Tennyson  
Procurement & Contracts Officer  
(510) 340-9103  
stennyson@cirm.ca.gov

If you have questions about the scope of services to be addressed in the proposal, contact:

Kevin McCormack  
Senior Director of Public Communications  
(415) 396-9813  
kmccormack@cirm.ca.gov

**Deadline for Response:** All required documents (including CD and hard copy with original signature) must be received at CIRM no later than 4:00 pm Pacific Time on **July 16, 2018**.

## **1. Introduction**

The California Institute for Regenerative Medicine (CIRM) was established in early 2005 following the passage of Proposition 71, the California Stem Cell Research and Cures Initiative. The statewide ballot measure, which provided \$3 billion in funding for stem cell research at California universities and research institutions, was approved by California voters on November 2, 2004, and called for the establishment of a new state agency to make grants and provide loans for stem cell research, research facilities and other vital research opportunities.

At CIRM, we never forget that we were created by the people of California to accelerate stem cell treatments to patients with unmet medical needs, and act with a sense of urgency to succeed in that mission.

To meet this challenge, our team of highly trained and experienced professionals actively partners with both academia and industry in a hands-on, entrepreneurial environment to fast track the development of today's most promising stem cell technologies.

With \$3 billion in funding and approximately 300 active stem cell programs in our portfolio, CIRM is the world's largest institution dedicated to helping people by bringing the future of cellular medicine closer to reality.

For more information go to [www.cirm.ca.gov](http://www.cirm.ca.gov)

### **Scope of Services Required**

CIRM seeks to contract with a graphic design firm that can design and produce a variety of marketing materials including on and offline graphics, presentations and social media outreach. For convenience, the consultant(s) selected to provide these services will be referred to herein as "the Firm".

In order to develop a standardized look for CIRM 2.0, CIRM hired a consultant in the fall of 2014. That consultant completed the new logo and branding included in the CIRM 2.0 Program Announcements as well as on the CIRM website (see <https://www.cirm.ca.gov/about-cirm>). As a result, the Firm selected will be provided with the new CIRM logo and will build upon that campaign.

The Firm will be expected to provide CIRM with the services described below:

- Production/Creation of Marketing Materials
- Annual Report Design
- Social Media Concepts
- Creative Development

The Firm that is selected must be technically and professionally capable of providing the services in all creative areas described in the Scope of Services and meet the Minimum Qualifications for Proposers in Section 3.2. The Firm must be free from actual conflicts of interest not only at the time of selection, but also throughout the term of the contract.

## **2. Cost Proposal- Anticipated Funding**

It is estimated that the initial funding for the contract will be approximately \$160,000 per year for the first year of the contract. There is the potential for two (2) years of contract extensions at CIRM's election and available budget.

## **3. Qualifications Required for Services as Requested**

As evidenced by the nature of the tasks listed above, CIRM expects to have a close working relationship with the Firm and requires that the Firm demonstrate a high degree of experience, training and proficiency in the conduct of the various functions performed. The Firm should have extensive background in graphic design and marketing as well as concept development and production. The selection process will focus on the Firm's creative breadth, cost efficiency and flexibility under tight deadlines. In addition, CIRM expects that the Firm will comply with current industry standards and will maintain appropriate expertise at the Firm's own expense.

### **3.1. Services Requested**

- **Production/Creation of Graphic Design Marketing Materials**
  - Please explain if your production is in-house
  - Please address standard turn-around times and how client requested expedites are handled
- **Annual Report Design**
  - Please discuss strategy for message development
  - Please address proposed schedule for Annual Report production
  - Services on Annual Report shall include
    - Design and Layout of 24 page full-color booklet (past year version attached for reference)
    - Concept and Drafts – please indicate number of permissible client reviews allowed for price quoted
    - Copy Editing/Copy Fitting Edit – ensure correct data accuracy, grammar and sentence structure
    - Pre-Press – prepare a pre-press layout of the document
    - Selection of Photographs and Graphics
    - Coordination with Selected Print Vendor

- **Social Media Concepts**
  - Describe how you plan to integrate social media into overall marketing strategy
- **Creative Development**
  - Please address the perceived value of brand continuity and give examples of how you ensure the brand moves across all mediums
  - Please explain how you perceive positioning CIRM in relation to the Regenerative Medicine Industry

### **3.2. Minimum Qualifications**

The following minimum qualifications and experience are required:

- a) Firm must be a professional Graphic Design and Marketing Agency with 5 years in business and experience in the healthcare, scientific and biotech fields.
- b) Firm must have conducted, within the last 5 years, at least 5 successful contracts for graphic design/promotional services within the healthcare, scientific and biotech fields.

## **4. Submitting a Proposal**

### **4.1. Documents to be Submitted**

There are four parts to a proposal. Part I (Consultant Information) and Part II (References) are included in this RFP as forms to be completed and returned with your proposal. There is no form for Part III (Proposal and Qualifications). You should prepare a PDF or Word document with your responses to the items listed in sections 3.1 and 4.2 and attach samples of your work. Part IV is the Notice Regarding Public Release of Proposals, which explains how you may designate certain materials as “confidential.” In order for your proposal to be considered, you must review and sign Public Release Notice and return it to CIRM with the other parts of your proposal.

### **4.2. Proposal and Qualifications**

Provide straightforward and concise responses to the following in a separate document:

- A. Qualifications and Experience of Firm. Discuss how your Firm’s overall experience demonstrates your Firm’s ability to successfully complete the Scope of Services and details described in Section 3.1. Provide a detailed list of graphic design/marketing services you have provided to clients over the past three years, highlighting your Firm’s unique services and accomplishments.

- B. Qualification of Staff/Resumes. Identify the staff members who will provide the services required by the proposal, including years and type of experience for each person. Experience should include number of years at current Firm as well as all relevant prior service. Experience in creative development and production expertise should be detailed.
- C. Comparable Projects. Provide a brief list and description of comparable clients and their graphic design/marketing projects which were successfully completed within the last three years. Please attach two samples of annual reports and two samples of marketing pieces that you have created for clients in the healthcare, scientific and biotech fields.
- D. Cost Proposal. The proposal should include the following information on costs:
- Cost for the design and layout of an Annual Report of approximately 24 pages
  - Cost for creation and production of a 2 sided/1-page handout to be used at industry events
  - Cost for creation and production of a 1-page ad for a conference brochure

### **4.3. Submission**

#### **4.3.1. Format**

Please submit a hard copy of the proposal, with original signature, and a digital copy on a CD. Both the hard copy and the digital copy must be received at CIRM before the deadline.

Hard Copy: Submit one hard copy, with original signature.

Digital: Submit a CD with a PDF version of the hard copy, as well as digital versions of samples of past work (as requested in Section 4.2 C).

### **4.3.2. Delivery**

The proposal envelope(s) should be addressed as follows and must be plainly marked with the RFP number and title:

Sheila Tennyson  
RFP 18/19 CIRM 144 for Graphic Design and Marketing Services  
California Institute for Regenerative Medicine  
1999 Harrison Street  
Suite 1650  
Oakland, CA 94612

### **4.3.3. Deadline**

**All submittals must be received at CIRM no later than 4:00 pm Pacific Time, July 16, 2018.**

## **5. Selection**

The purpose of the proposal evaluation process is twofold: (1) to assess the responses for compliance with the RFP's minimum qualifications, content and format requirements; and (2) to identify graphic design/marketing firms that have the highest probability of satisfactorily performing the services requested by CIRM at the best value. The evaluation process will be conducted in a comprehensive and impartial manner as set forth herein.

Proposals will undergo an evaluation process conducted by CIRM. In evaluating the proposals, CIRM will consider the perceived quality of the response, including Consultant's proposed scope of services, cost proposal, timeline, references, experience and qualifications. Evaluation will include consideration of the following factors:

- A. Relevant Experience and Ability. Evaluation of graphic design/marketing firms will include review of the Firm's overall experience, as well as the Firm's relevant experience. A factor under consideration will be whether the Firm's experience demonstrates its ability to successfully complete the requirements herein.
- B. Responsiveness to Project Requirements and Clients. Evaluation of prospective Firms will include consideration of responsiveness to client needs and requirements on previous projects, and the quality of the relationships maintained throughout the duration of these efforts. Attentiveness to and compliance with RFP instructions and other aspects of the selection process will be taken as an indication of responsiveness.
- C. Qualifications of Proposed Personnel. Evaluation of prospective consultants will include the particular experience, capabilities, and availability of specific personnel who will be available to provide services to CIRM.

D. Value. Range of services to be delivered within the proposed budget.

**6. Key Action Dates**

<u>Date</u>	<u>Action</u>
July 2, 2018	RFP available to prospective firms
July 16, 2018 @ 4:00 pm	Final Date for Proposal Submission See page 5
July 20, 2018	Proposed Award Date (Note: The actual award date may be earlier or later.)

**7. Contract Terms**

CIRM’s standard Independent Consultant Agreement is attached, and the selected firm will be expected to comply with its terms, including insurance requirements. Please review the contract terms before submitting your proposal.

CIRM expects the chosen graphic design/marketing firm will be able to start as soon as possible after the agreement is executed. CIRM anticipates entering into a contract with an initial expiration date of June 30, 2019 with two possible one-year extensions.

All contracts will contain a cancellation clause at CIRM’s election per CIRM’s standard Consulting Agreement.

**8. Additional Information**

- A. A proposal may be rejected if it is conditional or incomplete, or if it contains any alterations of form or other irregularities of any kind. CIRM may waive any immaterial deviation in a proposal. CIRM's waiver of an immaterial deviation shall in no way modify the RFP document or excuse the proposer from full compliance with all requirements if awarded the contract.
- B. CIRM may reject any or all proposals.
- C. Costs incurred for developing proposals and in anticipation of award of the agreement are entirely the responsibility of the proposer and shall not be charged to CIRM.
- D. A proposer may withdraw its proposal by submitting a written withdrawal request to CIRM, signed by the Proposer or an authorized agent. Proposals may not be withdrawn without cause subsequent to proposal submission deadline.

- E. A proposer may not modify a proposal after its submission. If the submission deadline has not passed, a proposer may withdraw its original proposal and submit a new proposal. Proposal modifications offered in any other manner, oral or written, will not be considered.
- F. CIRM may modify the RFP prior to the date fixed for submission of proposals by posting the modified RFP on its website. If you are preparing a proposal, you should check the CIRM website for modifications to the RFP.
- G. CIRM will not consider more than one proposal from an individual, firm, partnership, corporation or association, under the same or different names.
- H. No oral understanding or agreement shall be binding on either party.

**9. Public Release of Proposals**

All documents submitted in response to this RFP will become the property of CIRM and will be regarded as public records under the California Public Records Act (Government Code Section 6250 et seq.) and subject to review by the public. Attachment A to this RFP (Notice Regarding Public Release of Proposals) contains important details about the California Public Records Act and requirements for submitting any information in support of your proposal that you believe may legally be withheld from public disclosure. **In order for your proposal to be considered, you must review and sign Attachment A and return it to CIRM, along with your proposal.**

**10. Attached Documents**

- A. Notice Regarding Public Release of Proposals
- B. Form I: Consultant Information
- C. Form II: References
- D. CIRM's Standard Independent Consultant Agreement