



# LakeCounty

## Purchasing Division

<http://doingbusiness.lakecountyil.gov/>

**GENERAL REQUIREMENTS:** Proposers are to submit proposals electronically, to be opened and evaluated in private. Lake County will only be accepting electronic proposals submissions. Complete your response to the Request for Proposal in accordance with the instructions for the RFP.

### SUBMITTING REQUESTS FOR PROPOSAL ELECTRONICALLY

Please follow the steps below to upload your electronic submission:

1. Go to [www.lakecountypurchasingportal.com](http://www.lakecountypurchasingportal.com)
2. Click on the Bid Number: 20156
3. Click on register for this bid
4. Enter your username and password
5. Under the Submittals section you will be able to upload your bid submittal
  - a. Click on the browse button
  - b. Navigate your computer and select the appropriate file
  - c. Multiple files can be uploaded, each file can be no more than 20 MB
  - d. Click on save submittals
  - e. Close the browser
6. Please follow the same process to submit a redacted copy that can be used to comply with the Illinois Freedom of Information Act (FOIA). Please refer to the FOIA statute, 5 ILCS 140/1 *et seq.*, and specifically Section 7 therein, for an explanation of the information that may be redacted.

**ALL SUBMITTALS SHOULD BE LABELED ACCORDINGLY. Please make this label as part of the first page of submission:**

<b>RFP No. 20156</b>	<b>Vendor Name:</b> _____  <b>Vendor Address:</b> _____
<b>Buyer: Stacy Davis-Wynn</b>	
<b>Description: Workforce Development Board Strategic Marketing &amp; Communication Plan</b>	
<b>RFP Due Date*: Wednesday, November 4, 2020 by 11:00 am local time.</b> <b>Lake County will only be accepting electronic submissions for this RFP.</b>	

**\*Please note: Responses are due at 11:00 a.m. local time on Wednesday, November 4, 2020. Please upload your proposal early and allow sufficient time for any technical problems that may arise. If the document will not go through, please call the Buyer assigned to this solicitation, Stacy Davis-Wynn at 847-377-2929 or email at [sdaviswynn@lakecountyil.gov](mailto:sdaviswynn@lakecountyil.gov). If you would like to receive confirmation that we have successfully received your submission, please email at [purchasing@lakecountyil.gov](mailto:purchasing@lakecountyil.gov).**

**Lake County, Illinois**  
**Request for Proposals #20156**  
**Workforce Development Board Strategic Marketing & Communication Plan**

This Request for Proposal (RFP) is for the purpose of establishing a contract with a qualified Marketing and Communications professional group and/or individual ("Consultant") to provide consulting services for the development of a strategic marketing and communications plan for the Lake County Workforce Development Board.

**SUBMISSION DATE & TIME:** **Wednesday, November 4, 2020 by no later than 11:00 AM local time**  
Proposals received after the listed date and time specified will not be opened.

**CONTACT / QUESTIONS:** **All contact and questions regarding the Request for Proposal shall be with the Purchasing Division.** Should the proposer require additional information about this RFP, please submit questions on our website at <http://lakecountypurchasingportal.com> by selecting the RFP number and addendum link. Questions may also be submitted via email to [purchasing@lakecountyil.gov](mailto:purchasing@lakecountyil.gov). All questions shall be submitted no less than seven (7) days prior to the RFP opening date.

**CONTENTS:** The following sections, including this cover sheet, shall be considered integral of this solicitation.

- \*Cover Sheet
- \*General Terms and Conditions
- \*Scope of Work
- \*Submittals
- \*Evaluation Criteria
- \*Addendum Acknowledgement
- \*Proposal Price Sheet
- \*General Information Sheet
- \*References
- \*Sustainability Statement
- \*Vendor Disclosure Statement

If your RFP includes any exceptions, proposers must insert an "X" in the following box indicating a submission with exceptions and provide separately a submission with noted exceptions.

☐

**NOTE TO PROPOSERS:** Any and all exceptions to these specifications MUST be clearly and completely indicated in the Proposer's response to the RFP. Failure to do so may lead the County to declare any such term non-negotiable. Proposer's desire to take exception to a non-negotiable term will not disqualify it from consideration for award.

1. NEGOTIATIONS

Lake County reserves the right to negotiate specifications, terms and conditions, which may be appropriate to the accomplishment of the purpose of this Request for Proposal (RFP).

2. CONFIDENTIALITY

Proposals are subject to the Illinois Freedom of Information Act (FOIA) once an award or final selection is made. As such all Proposers responding are asked to submit one redacted copy of their proposal that can be used by the County to respond to any future FOIA requests for the proposal.

Please refer to the FOIA statute, 5 ILCS 140/1 *et seq.*, and specifically Section 7 therein, for explanation of information that may be redacted. For example, information exempt from disclosure in response to a FOIA request includes but is not limited to: highly personal or objectionable information; trade secrets and commercial or financial information claimed as proprietary, privileged or confidential, the disclosure of which would cause your business competitive harm; valuable formulae, computer geographic systems, designs, drawings and research data when disclosure of the same would produce private gain or public loss; certain construction related technical documents; and information associated with automated data processing operations that, if disclosed, would jeopardize system or data security.

If no redacted copy is provided, the Lake County Purchasing Division reserves the right to determine what information should be redacted as proprietary, privileged or confidential in response to a FOIA request. A Proposer who fails to provide a redacted copy of its proposal waives its right to maintain any claims against Lake County, its agents or employees for disclosure of this information.

3. RESERVED RIGHTS

Lake County reserves the right, at any time and for any reason, to cancel this RFP or any portion thereof, to reject any or all proposals, or to accept an alternate proposal. The County reserves the right to waive any immaterial defect in any proposal. Unless otherwise specified by the Proposer, the County has ninety (90) days to accept. The County may seek clarification from a Proposer at any time. Proposer's failure to respond promptly is cause for rejection. The County may require submission of best and final offers.

4. INCURRED COSTS

Lake County will not be liable for any costs incurred by respondents in replying to this RFP.

5. AWARD

Lake County reserves the right to award this contract based on the evaluation criteria set forth herein. Award shall be made by the Lake County Board to the responsible Proposer determined to be the most qualified and advantageous to the County. Lake County reserves the right to award this Contract in whole or in part if determined to be in the best interests of the County.

6. ADDITIONAL INFORMATION

Should the Proposer require additional information about RFP, please submit questions on our website at <http://lakecountypurchasingportal.com> by selecting RFP number and addendum link. Questions may also be submitted via email to [purchasing@lakecountyil.gov](mailto:purchasing@lakecountyil.gov). All questions shall be submitted no less than seven (7) days prior to RFP opening date. ANY and ALL changes to these specifications are valid only if they are included by written Addendum to all Proposers. No interpretation of the meaning of the plans, specifications or other contract documents will be made orally. Failure of any Proposer to receive any such addendum or interpretation shall not relieve the Proposer from obligation under this RFP as submitted. All addenda so issued shall become part of the RFP documents. Failure to request an interpretation constitutes a waiver to later claim that ambiguities or misunderstandings caused a Proposer to improperly submit a proposal.

7. ADDENDUM ACKNOWLEDGEMENT

Any and all changes to the specifications and terms and conditions of this RFP are valid only if they are included by

addendum issued by Lake County Purchasing. Proposers shall acknowledge addenda by signing the enclosed Addenda Acknowledgement form. It is the Proposers responsibility to check for addenda, posted on the website at <http://lakecountypurchasingportal.com> prior to the submittal due date. No notification will be sent when addendums are posted unless there is an addendum within three business days of the submittal due date.

8. DISCUSSION OF PROPOSALS AND NEGOTIATION

Lake County may conduct discussions with any Proposer who submits a proposal. During the course of such discussions, the County shall not disclose any information derived from one proposal to any other Proposer. Lake County anticipates conducting negotiations with the successful Proposer. Your proposal should indicate any exceptions taken to this.

9. EXCEPTIONS

Any and all exceptions taken by Proposer to the terms of this RFP are to be identified in writing and included in the list of submittals.

10. CONTRACT TERM

This Agreement shall be in effect for a twelve 12-month period from the date of award. Lake County reserves the right to renew this agreement for one (1) additional year, subject to acceptable performance by the contractor. At the end of any contract term, Lake County reserves the right to extend this contract for a period of sixty (60) days for the purpose of getting a new contract in place.

11. RESPONSIBILITY & DEFAULT

The Proposer shall be required to assume responsibility for all items listed in this RFP. The successful Proposer shall be considered the sole point of contact for purposes of this contract.

12. PURCHASE ORDER AND PAYMENT

The Proposer shall submit an invoice detailing the services and products provided, based on the breakdown of items as listed on the Price Proposal Sheets, and based on the Project Specifications. Invoices shall show the purchase order number and the address where the product or services are provided. Payment shall be made in accordance with the Local Government Prompt Payment Act.

13. INTERPRETATION OR CORRECTION OF REQUEST FOR PROPOSALS

Proposers shall promptly notify the Purchasing Division of any ambiguity, inconsistency or error that they may discover upon examination of the RFP. Interpretation, correction and changes to the RFP will be made by addendum. Interpretation, corrections or changes made in any other manner will not be binding.

14. TAXES

The County is exempt from paying certain Illinois State Taxes.

15. TERMINATION

The County reserves the right to terminate this contract, or any part of this contract, upon thirty (30) days written notice. In case of such termination, the Proposer shall be entitled to receive payment from the County for work completed to date in accordance with the terms and conditions of this contract. In the event that this Contract is terminated due to Proposers default, the County shall be entitled to purchase substitute items and/or services elsewhere and charge the Proposer with any or all losses incurred, including attorney's fees and expenses.

16. INDEPENDENT CONTRACTOR

The Proposer is an independent contractor and no employee or agent of the Proposer shall be deemed for any reason to be an employee or agent of Lake County.

17. NON-DISCRIMINATION

The Proposer shall comply with the Illinois Human Rights Act, 775 ILCS 5/1-101 et seq., as amended and any rules and regulations promulgated in accordance therewith, including, but not limited to the Equal Employment Opportunity Clause, Illinois Administrative Code, Title 44, Part 750 (Appendix A), which is incorporated herein by reference.

Furthermore, the Proposer shall comply the Public Works Employment Discrimination Act, 775 ILCS 10/0.01 et seq., as amended.

#### 18. INDEMNIFICATION

The Proposer agrees to indemnify, save harmless and defend Lake County, its agents, servants, and employees, and each of them against and hold it and them harmless from any and all lawsuits, claims, demands, liabilities, losses and expenses, including court costs and attorney's fees, for or on account of any injury to any person, or any death at any time resulting from such injury, or any damage to property, which may arise or which may be alleged to have arisen out of or in connection with the work covered by this contract. The foregoing indemnity shall apply except if such injury, death or damage is caused directly by the willful and wanton conduct of Lake County, its agents, servants, or employees or any other person indemnified hereunder.

#### 19. INSURANCE

The Proposer must obtain, for the Contract term and any extension of it, insurance issued by a company or companies qualified to do business in the State of Illinois with an A.M. Best Rating of at least A-and provide the County with a Certificate of Insurance 15 days before the start of the project, and thereafter annually for contracts/ projects that will last more than one year. Insurance in the following types and amounts is necessary and/or where applicable:

##### Workers Compensation (Coverage A) and Employers Liability (Coverage B)

Workers Compensation Insurance covering all liability of the Proposer arising under the Worker's Compensation Act and Worker's Occupational Disease Act at limits in accordance with the laws of the State of Illinois. Employers' Liability Insurance shall be maintained to respond to claims for damages because of bodily injury, occupational sickness, or disease or death of the Proposer's employees, with limits listed below:

##### Employers Liability

- a) Each Accident \$1,000,000
- b) Disease-Policy Limit \$1,000,000
- c) Disease-Each Employee \$1,000,000

Such Insurance shall contain a waiver of subrogation in favor of Lake County.

##### Commercial General Liability Insurance

In a broad form on an occurrence basis shall be maintained, to include, but not be limited to, coverage for property damage, bodily injury (including death), personal injury and advertising injury in the following coverage forms where exposure exists:

- Premises and Operations
- Independent Contractors
- Products/Completed Operations
- Liability assumed under an Insured Contract/ Contractual Liability
- Personal Injury and Advertising Injury

With limits of liability not less than:

\$ 1,000,000 Each Occurrence

\$ 1,000,000 Products-Completed Operations

\$ 1,000,000 Personal and Advertising injury limit

\$ 2,000,000 General aggregate; the CGL policy shall be endorsed to provide that the General Aggregate limit

applies separately to each of the Proposer's projects away from premises owned or rented to contractor.

##### Automobile Liability Insurance (if applicable)

Automobile liability insurance shall be maintained to respond to claims for damages because of bodily injury, death of a person, or property damage arising out of ownership, maintenance, or use of a motor vehicle. This policy shall be written to cover any auto whether owned, leased, hired, or borrowed.

The Proposer's auto liability insurance, as required above, shall be written with limits of insurance not less than the following: \$ 1,000,000 Combined single Limit (Each Accident)

Care, Custody and Control Policy:

Contractor shall provide property damage coverage for any and all property /inventory of Lake County (including, but not limited to, motor vehicles) while said property /inventory is in the care, custody and control of Jail Commissary with limits to match the value of the property/inventory being sold.

Professional Liability – Errors and Omissions (if applicable)

The Engineers/Architects/Consultants for the plans of the project shall be written with limits of insurance not less than the following: \$ 1,000,000 per claim per policy year

Coverage shall be provided for up to three (3) years after project completion. Policy is to be on a primary basis if other professional liability is carried.

Professional Liability – Cyber Liability (if applicable)

Cyber Liability Insurance for property damage to electronic information and/or data; first and third-party risks associated with e-business, internet, etc., with limits of insurance not less than the following: \$ 1,000,000 per occurrence limit

Technology Errors and Omissions (if applicable)

The Proposer's Software Developer and/or IT Consultant for the plans, including developing and implementing technology for Lake County, or of the project, shall be written with limits of insurance not less than the following: \$ 1,000,000 per occurrence limit

Excess/ Umbrella Liability (if applicable)

The Proposer's Excess/ Umbrella liability insurance shall be written with the umbrella follow form and outline the underlying coverage, limits of insurance will be based on size of project: \$ 2,000,000 per occurrence limit (*minimum, and may be higher depending on the project*)

Liability Insurance Conditions

Proposer agrees that with respect to the above required insurance:

- a) The CGL policy shall be endorsed for the general aggregate to apply on a "per Project" basis;
- b) The Contractor's insurance shall be primary in the event of a claim.
- c) Proposer agrees that with respect to the above required insurance, Lake County shall be named as additional insured, including its agents, officers, and employees and be provided with thirty (30) days' notice, in writing by endorsement, of cancellation or material change;
- d) Lake County shall be provided with Certificates of Insurance and endorsements evidencing the above required insurance, prior to commencement of this Contract and thereafter with certificates evidencing renewals or replacements of said policies of insurance at least thirty (30) days prior to the expiration of cancellation of any such policies. Email Certificates of Insurance to the following email address: [purchasing@lakecountyil.gov](mailto:purchasing@lakecountyil.gov)
- e) Any hard copies of said Notices and Certificates of Insurance shall be provided to:

**Lake County  
Purchasing Division  
18 N. County 9th Floor  
Waukegan, IL 60085  
Attn: RuthAnne Hall, Lake County Purchasing Agent**

Failure to Comply: In the event the Proposer fails to obtain or maintain any insurance coverage required under this agreement, Lake County may purchase such insurance coverage and charge the expense to the Proposer.

20. Conflict of Interest

Neither the Proposer, nor any of its employees, directors, officers, or representatives believes that a conflict of interest may arise through entry into an agreement with Lake County. The Proposer, its employees, directors, officers, and

representatives know and pledge to comply fully with all conflict of interest laws and ordinances of the State of Illinois and Lake County.

21. ASSIGNMENT

The Proposer may not reassign any award made, as the result of this RFP, without prior written consent from the County.

22. JURISDICTION, VENUE, CHOICE OF LAW

This RFP and any contract resulting there from shall be governed by and construed according to the laws of the State of Illinois. Jurisdiction and venue shall be exclusively found in the 19<sup>th</sup> Judicial Circuit Court, State of Illinois.

23. CHANGE IN STATUS

The Proposer shall notify Lake County immediately of any change in its status resulting from any of the following: (a) Proposer is acquired by another party; (b) Proposer becomes insolvent; (c) Proposer, voluntary or by operation law, becomes subject to the provisions of any chapter of the Bankruptcy Act; (d) Proposer ceases to conduct its operations in normal course of business. Lake County shall have the option to terminate its Agreement with the Proposer immediately on written notice based on any such change in status.

24. DISPUTE RESOLUTION

All issues, claims, or disputes arising out of this Agreement shall be resolved in accordance with the Appeals and Remedies Provisions in Article 9 of the Lake County Purchasing Ordinance.

25. NON-ENFORCEMENT BY THE COUNTY

The Proposer shall not be excused from complying with any of the requirements of the Contract because of any failure on the part of the County, on any one or more occasions, to insist on the Proposer performance or to seek the Proposers compliance with any one or more of said terms or conditions.

26. PRECEDENCE

Where there appears to be variances or conflicts, the following order of precedence shall prevail: Lake County General Terms & Conditions, Lake County Request for Proposal Terms Scope of Work, and the Proposal Response.

27. PERSONAL EXAMINATION

Proposers are required to satisfy themselves, by personal examination of the site as to work involved and the difficulties likely to be encountered in the performance of work under this Agreement. No plea of ignorance of conditions that exist now or hereafter, or of any conditions of difficulties that may be encountered in the execution of the work under this Agreement will be accepted as an excuse for failure to or omission on the part of the Proposer to fulfill in every respect all the requirements and specifications, nor will same be accepted as a basis for any claim for extra compensation.

The Proposer is responsible to investigate and gather all relevant and pertinent information prior to submitting a proposal. By submitting a proposal, the Proposer affirms that they have performed all due diligence and are aware of all critical factors that may affect the provision of the services as described in the RFP. Such critical factors may include but are not limited to; location, space, utilities, scope of operations, and any other conditions, which may affect the Proposer operations. No allowance will be made for not being familiar with existing conditions to be encountered.

28. PRICING

Pricing shall be included on Proposal Pricing Summary.

29. JOINT PURCHASING

The purchase of goods and services pursuant to the terms of this Contract shall also be offered for purchases to be made by other governmental units, as authorized by the Governmental Joint Purchasing Act, 30 ILCS 525/0.01, et seq. (the "Act"). All purchases and payments made under the Act shall be made directly by and between each governmental unit and the successful Proposer. The Proposer agrees that Lake County shall not be responsible in any way for purchase orders or payments made by the other governmental units. The Proposer further agrees that all terms and conditions of this Contract shall continue in full force and effect as to the other governmental units during extended terms. The credit or liability of each governmental unit shall remain separate and distinct. Disputes between Proposers and governmental



units shall be resolved between the immediate parties.

The Proposer and the other governmental units may negotiate such other and further terms and conditions to this Contract ("Other Terms") as individual projects may require. To be effective, other terms shall be reduced to writing and signed by a duly authorized representative of both the successful Proposer and the other governmental unit.

The Proposer shall provide the other governmental units with all required documentation set forth in the solicitation including but not limited to performance and payment bonds, Certificates of Insurance naming the respective governmental unit as an additional insured, and certified payrolls to the other governmental unit as required.

### 30. ECONOMIC OPPORTUNITY PROGRAM

Lake County launched a **Buy Local. Build Local. Work Local.** initiative in 2013 to increase the outreach and procurement opportunities for businesses located within Lake County, including women-owned businesses and minority-owned business enterprises (L/W/MBE). The overarching objective is to maximize participation from these businesses in the County's procurement process, in accordance with applicable law. The County will take all necessary and reasonable steps to assure that business enterprises defined as L/W/MBE shall have a fair opportunity to participate in County contracts. As part of its Economic Opportunity Program (EOP) commitment the County will make every effort to achieve the following objectives:

- (a) To ensure nondiscrimination in the award and administration of contracts;
  - (b) To create a level playing field on which L/W/MBEs can compete fairly for contracts by providing any necessary training and assistance in bid preparation;
  - (c) To ensure that the County's EOP is narrowly tailored in accordance with applicable law;
  - (d) To establish a means for firms identifying themselves as L/W/MBEs to register for procurement opportunities and work cooperatively with contracted firms to report on measures that demonstrates the County's commitment to its EOP; and,
  - (e) To help remove barriers to the participation of L/W/MBEs through notification of contract opportunities.
- Successful Proposers are encouraged to work with Workforce Development to post any and all opportunities for employment on County contracts. Lake County's Workforce Development mission is to foster and ensure the economic prosperity of the Lake County community by maximizing the potential of businesses and workers. As such, Workforce Development provides a key resource for job seekers and employers.

State law mandates an open and competitive bidding process and requires that publicly procured contracts be awarded to the lowest responsible and responsive bidder with no demonstrated preference based on the bidder's location, race and gender.

### 31. REPORTING REQUIREMENTS FOR AWARDED CONTRACTS

All awarded vendors will identify and report the type of ownership— L/W/MBE, and/or not L/W/MBE for any work that they or their approved subcontractors will perform. In addition, Lake County requests that all awarded vendors provide an accounting of employees assigned throughout the term of the contract in regard to their home address and ethnicity. Lake County may use any data collected to report on potential of businesses and workers benefitting from County contracts.

### 32. LAKE COUNTY OWNERSHIP OF INFORMATION

All information pertaining to records, data collected, property, financial or other information acquired under the scope of this contract shall be strictly confidential and the sole property of Lake County. The Proposer shall return all information to Lake County upon termination, and/or request and shall not utilize any of the information for purposes outside of the scope of this contract or without express approval of Lake County. Upon County request, the Proposer must provide all Lake County data in a documented, standard format.

### 33. JOINT VENTURES & SUCCESSFUL PROPOSER MERGERS, ACQUISITIONS, DIVESTITURES OR CHANGE IN STRATEGY

In the event a joint venture is proposed, each party to the joint venture must meet all applicable requirements of the RFP. The party submitting the response shall be considered the sole contact for issues relating to this RFP. In the event of a merger, acquisition, divestiture or change in strategy, the successful proposer will state its commitment to continue to provide services.



34. OUT OF POCKET EXPENSES

All out-of-pocket expenses paid by the Proposer during the project will be incurred solely at the Proposers expense.

35. INFORMATION SECURITY

In the process of performing services to Lake County the Proposer may come in contact with information deemed important and proprietary to Lake County. The Proposer agrees that any services performed for Lake County, whether on Lake County premises or not, will meet or exceed Lake County's information security policy and privacy standards. Lake County reserves the right to audit proposer's performance in meeting these standards.

36. KEY PERSONNEL

Proposer shall not replace any Key Personnel without the County's prior written consent, which shall not be unreasonably withheld. Should one of the Key Personnel be reassigned, become incapacitated, cease employment by Proposer, and/or be unable to perform the functions or responsibilities assigned to him or her, Proposer shall (i) within ten (10) business days, temporarily replace them with another properly qualified employee and (ii) within thirty (30) calendar days, permanently replace the contact. Lake County reserves the right with advance notice, and Proposer having the opportunity to remedy, to request the dismissal and removal of Proposer staff from the project for reasonable cause. Any decision to substitute or replace Proposers Subcontractor for the implementation of proposed solution, will need a prior written consent from the County.

- Provide a summary organizational chart. Identify the primary contact and describe the roles of each key person.
- Provide detailed resumes for all key professionals who will be directly responsible for providing services to the County. Include the following information: title, number of years at your firm, total number of years of experience, professional designations or licenses.

**1. INTENT**

This Request for Proposal (RFP) is for the purpose of establishing a contract with a qualified Marketing and Communications professional group and/or individual ("Consultant") to provide consulting services for the development of a strategic marketing and communications plan for the Lake County Workforce Development Board.

**2. BACKGROUND**

The Lake County Workforce Development Board (Board) provides oversight and policy direction for workforce development programs in Lake County and the Workforce Innovation and Opportunity Act (WIOA) Title I federal funds received by Lake County. The Board ensures WIOA funds are spent on local workforce development programs serving youth, adults, dislocated workers, jobseekers and workers invested in addressing the talent and hiring needs of businesses and employers throughout Lake County. The Board is committed to maintaining high fiduciary standards through the budgeting and oversight of these federal U.S. Department of Labor WIOA funds.

**3. FUNDING**

The Workforce Board has budgeted \$50,000 of WIOA funds annually.

**4. DURATION**

The Board will award funding for a twelve (12) month contract with the option for renewal for up to an additional twelve months based on funding and performance. Program renewal design and funding cannot deviate from the initial award. The program may begin no sooner than January 12, 2021.

**5. PROJECT TIMELINE**

To ensure that Lake County is able to implement the proposed solution, the proposers should indicate their ability to meet the deadlines indicated below:

**PROJECT TIMELINE**

To ensure that that Lake County is able to implement the proposed solution, the proposers should indicate their ability to meet the deadlines indicated below:

Action Item	Proposed Schedule*
Issue RFP	October 8, 2020
Deadline for submission of questions	October 27, 2020 by 11:00 am local time
RFP Due Date	November 4, 2020 by 11:00 am local time
RFP Review	November 9, 2020 – November 20, 2020
Shortlist Meeting	November 23, 2020 – November 27, 2020
Shortlist Presentation (if necessary)	November 30, 2020 – December 4, 2020
Contract Negotiations	December 7, 2020 – December 11, 2020
County Board Approval	January 12, 2021

**\*This timeline may be subject to change.**

## **SPECIFICATIONS**

### **Workforce Development Board Strategic Marketing & Communication Plan**

**October 2020**

#### **SCOPE OF WORK**

This Request for Proposal (RFP) is for the purpose of establishing a contract with a qualified Marketing and Communications professional group and/or individual (“Consultant”) to provide consulting services for the development of a strategic marketing and communications plan for the Lake County Workforce Development Board.

Requested Services include, but are not limited to:

- Develop a long-range marketing and communications plan for the organization that in conclusion of the contract will:
  - Increase awareness of the Workforce Board and the mission of the Board
  - Establish a creative brand that includes messaging, design, tone and personality
  - Increase awareness through positive stories and successful partnerships
  - Create a process that streamlines communications through creative development to execution including but not limited to online, print, periodic reports and newsletter
  - Increase awareness of services and resources for individual job seekers and businesses throughout Lake County
- Conduct planning sessions with staff, board members and key stakeholders;
- Develop a timeline for the implementation of priority actions; and
- Present the final plan to staff and board members.

## **SUBMITTAL REQUIREMENTS**

### **Workforce Development Board Strategic Marketing & Communication Plan**

**October 2020**

#### **DETAILED SUBMITTAL REQUIREMENTS**

Proposals should be prepared as simple as possible and provide a straightforward, concise description of the proposed products and services to satisfy the requirements of the RFP. Attention should be given to accuracy, completeness, relevance and clarity of content. The proposal should be organized into the following major sections:

- A. Introduction Material and Executive Summary
- B. Company Background
- C. Scope of Services
- D. Implementation Plan
- E. Project Budget
- F. Client References
- G. Exceptions to the RFP
- H. Value added services
- I. Sustainability Statement
- J. Vendor Disclosure Statement
- K. Addendum Acknowledgement

#### **A. Introduction Material and Executive Summary**

The introductory material must include a title page with the RFP number, subject, name of the Proposer, address, telephone number, e-mail address, the date, a letter of transmittal and a table of contents. The executive summary should be limited to a brief narrative summarizing the proposal.

#### **B. Company Background**

In this section provide information about the company so that the County can evaluate the Proposer's stability and ability to support the commitments set forth in the response to this RFP. Information in this section should contain the following information in addition to the General Information Sheet that is also included as an exhibit to this RFP:

1. Company name and location of the corporate headquarters and of the nearest office to Lake County.
2. The number of years the company has been in business and the number of years the company has been providing services to the public sector.
3. Include information on the company's customer base, such as the number of public sector clients the company serves, the number of local government clients, and the number of public sector clients in the state.
4. Identify if the company serves other industries.
5. Include a brief summary of the company's organizational characteristics such as the number of employees, their backgrounds, whether the company is privately held, publicly traded, or if it is a subsidiary to a parent company.
6. Describe any other business affiliations (e.g., subsidiaries, joint ventures, "soft dollar" arrangements with brokers).
7. Identify the individuals who will be the account representative for Lake County, including office locations, telephone numbers and email addresses.

#### **C. Scope of Services**

This section of the proposal should include a general discussion of the Proposer's overall understanding of the project and the scope of work. For each task that is identified in the scope of services outlined in the specifications, please identify your firm's approach and response to address the desired service outlined.

#### **D. Implementation Plan**

This section should describe the Proposer's plan. Proposers should assume that the County will contribute all necessary effort to ensure success in the project.

1. Provide methodology for implementation. Methodology should include estimated timeframe, overview of deliverables, assumptions and assumed responsibilities and roles of the County and proposed project team.
2. Proposer shall provide a 12-month project timeline.
3. Provide project team resumes for key members of the implementation team expected to be on the County's project.
4. Proposer shall indicate the ability to have all services implemented and fully operational within twelve months of the start of the contract.

#### **E. Project Budget**

Budget and Budget Narrative: Information related to funding that will support the proposed project that includes:

- o Detailed breakdown of costs that identifies how requested funds will be utilized;
- o Narrative explaining reason for each requested budget item and provide the basis for calculating costs;
- o Narrative identifying the amount, source/type of funds and use of leveraged or in-kind contributions to the project.

#### **F. Client References**

The County considers references to be an important factor in its decision to award a contract. Proposers should supply references that will be available to speak with the County. Three references should be provided that provided similar type of work completed in the past two to years. A reference sheet is included as a submittal as part of this RFP document.

#### **G. Exceptions to the RFP**

All requested information to this RFP must be supplied as this document and subsequent proposals submitted help form the basis for a contract with the selected proposer. Proposers may take exception to certain requirements in this RFP. All exceptions shall be clearly identified in this section and written explanation shall include the scope of the exceptions, the ramifications of the exceptions for the County and the descriptions of the advantages or disadvantages to the County as a result of the exception. The County, at its sole discretion, may reject any exceptions or specifications within the proposal.

#### **H. Value Added Services**

Please include any value-added services your firm provides in your submittal.

#### **I. Sustainability Statement**

Lake County is committed to green and sustainable practices and good environmental stewardship. Consequently, Proposers are asked to provide a Statement of Sustainability to demonstrate that they are also incorporating sustainability into their firms' practices. A Sustainability Statement form is included as part of the RFP. Proposers are asked to provide a clear description of your firm's sustainable practices, policies, or procedures in the following areas: waste minimization, energy efficiency, water efficiency, staff and education.

#### **J. Vendor Disclosure Statement**

This disclosure statement is being filed in accordance with the Lake County Ethics Ordinance and Lake County Purchasing Ordinance. October 2019 the Lake County Board revised our Vendor Disclosure Statement Policy, which require vendors to disclose any familial relationships between a Lake County elected official, department director, deputy director, manager and owners, principals or officers of the vendor's company as well as campaign contributions to County elected officials.

## **EVALUATION CRITERIA**

### **Workforce Development Board Strategic Marketing & Communication Plan**

**October 2020**

The County will conduct a comprehensive, fair, and impartial evaluation of proposals received in response to this procurement effort. All proposals will be evaluated by how well the proposal satisfies the described/stated needs, rather than how exactly the proposal matches the strictest interpretation of the terminology and design concepts stated herein.

#### **Evaluation Organization**

- a. An Evaluation Committee will be established to score and evaluate the submitted proposals.
- b. The Evaluation Committee may include members from Lake County's departments who have experience with these services. The Committee will be responsible for the proposal evaluation (including corporate reference checks).

The Evaluation Committee shall evaluate, in a fair and impartial manner, all proposals submitted in response to this RFP on the following criteria:

1. Qualifications and Experience - 35pts
2. Understanding and ability to meet and/or exceed the scope of services – 35pts
3. Project Budget – 20pts
4. Completeness of proposal and responses for required information – 10pts

**TOTAL: 100pts**

#### **Short List**

The evaluation factors will be used to assist the evaluation committee in determining a short list. Proposers will be notified by the County if they have been selected for the short list. Please note, Lake County reserves the right to not short list all Proposers if it is not in the best interest of the County.

#### **Interview**

Lake County reserves the right, as part of the evaluation process, to ask for additional materials, interview, or schedule site visits to any locations serviced by Proposers. Site visits may be scheduled or unscheduled as determined by the County. If applicable, the County shall contact Proposers to arrange an interview.

#### **Additional Investigations**

The County reserves the right to make such additional investigations as it deems necessary to establish the competence and financial stability of any firm submitting a proposal.

#### **Best and Final Offer**

The County reserves the right to request a Best and Final Offer (BAFO) if additional information or modified terms are necessary for the Evaluation Committee to complete its evaluation and ranking. A BAFO will not be used solely to reduce pricing. If a BAFO is requested, all short-listed proposers, or if the short list process is not used, all qualified Proposers will be provided an opportunity to submit a modified Response. Only one BAFO request will be issued by the County. The information received from the BAFO will be used by the Evaluation Committee to re-evaluate and re-rank the Proposers.

#### **Intent to Negotiate**

The County reserves the right to invite the most qualified Proposer to negotiate final terms and conditions, finalize scope clarification and confirm final pricing and payment terms. The information received from the negotiation shall be found in the final contract document. If the parties are unable to negotiate a satisfactory contract the negotiations will be terminated. The County reserves the right to either begin negotiations with the qualified Proposer that is next preferred or non-award the request for proposal.



**PROPOSAL PRICE SHEET****Workforce Development Board Strategic Marketing & Communication Plan****October 2020**

The price proposal shall include a total price as a fixed fee for all services delineated in this RFP. The proposer will consider all costs (labor, overhead, administration, profit, travel, etc.) associated with providing the services listed in this RFP. Any hourly rates for services that may not be included shall be provided with the corresponding service and rate. All additional services beyond the initial scope of the project, identified by the Proposer as beneficial to the County, shall be delineated separately for the County to consider.

Please delineate services and price as proposed to meet the requirements of the RFP.

<b>PROPOSED PRICE FOR ALL SERVICES LISTED IN THE SCOPE OF SERVICES OF THIS RFP</b>	<b>TOTAL PRICE</b>
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Please delineate Position Title and any services that are options but not included in the original scope of the RFP.

<b>POSITION TITLE</b>	<b>HOURLY RATE</b>	<b># OF HOURS</b>



**Addendum Acknowledgement RFP #20156**

The undersigned acknowledges receipt of the following addendum(s):

ADDENDUM #	SIGNATURE

*I have examined and carefully prepared the submittal documentation in detail before submitting my response to Lake County.*

Submittal Number: 20156

Company Name: \_\_\_\_\_

Authorized Representative: \_\_\_\_\_

*Signature*

Authorized Representative: \_\_\_\_\_

*Print*

Date: \_\_\_\_\_

It is the vendor's responsibility to check for addendums, posted on the website at <http://lakecountypurchasingportal.com> prior to the submittal due date. No notification will be sent when addendums are posted unless there is an addendum within three business days of the submittal due date.

If the submittal has already been received by Lake County, vendors are required to acknowledge receipt of addendum via email to [purchasing@lakecountyiil.gov](mailto:purchasing@lakecountyiil.gov) prior to the due date.

Submittals that do not acknowledge addendums may be rejected.

All responses are to be submitted in a sealed envelope. Envelopes are to be clearly marked with required submittal information.

**AUTHORIZED NEGOTIATORS:**

Name: \_\_\_\_\_ Phone # \_\_\_\_\_ Email Address: \_\_\_\_\_

Name: \_\_\_\_\_ Phone # \_\_\_\_\_ Email Address: \_\_\_\_\_

**BUSINESS ORGANIZATION:** (check one only)

\_\_\_\_\_ Sole Proprietor: An individual whose signature is affixed to this proposal.

\_\_\_\_\_ Partnership: State full names, titles, and addresses of all responsible principals and/or partners on attached sheet.

\_\_\_\_\_ Corporation: State of incorporation: \_\_\_\_\_

\_\_\_\_\_ Non-profit Corporation

\_\_\_\_\_ 501c3-- U.S. Internal Revenue Code

By signing this proposal document, the proposer hereby certifies that it is not barred from responding on this contract as a result of a violation of either Section 33E-3 or 33E-4 of the Illinois Criminal Code of 1961, as amended.

\_\_\_\_\_  
Business Name\_\_\_\_\_  
Signature\_\_\_\_\_  
Title\_\_\_\_\_  
Print or Type Name\_\_\_\_\_  
Date

**REFERENCES**

List below other similar size clients for who you have provided similar services. Please include the email address for each reference.

Agency Name: \_\_\_\_\_  
Address \_\_\_\_\_  
City, State, Zip Code \_\_\_\_\_  
Telephone Number \_\_\_\_\_  
E-Mail \_\_\_\_\_  
Contact Person \_\_\_\_\_  
Dates of Service \_\_\_\_\_  
# of Employees \_\_\_\_\_

Agency Name: \_\_\_\_\_  
Address \_\_\_\_\_  
City, State, Zip Code \_\_\_\_\_  
Telephone Number \_\_\_\_\_  
E-Mail \_\_\_\_\_  
Contact Person \_\_\_\_\_  
Dates of Service \_\_\_\_\_  
# of Employees \_\_\_\_\_

Agency Name: \_\_\_\_\_  
Address \_\_\_\_\_  
City, State, Zip Code \_\_\_\_\_  
Telephone Number \_\_\_\_\_  
E-Mail \_\_\_\_\_  
Contact Person \_\_\_\_\_  
Dates of Service \_\_\_\_\_  
# of Employees \_\_\_\_\_

Agency Name: \_\_\_\_\_  
Address \_\_\_\_\_  
City, State, Zip Code \_\_\_\_\_  
Telephone Number \_\_\_\_\_  
E-Mail \_\_\_\_\_  
Contact Person \_\_\_\_\_  
Dates of Service \_\_\_\_\_  
# of Employees \_\_\_\_\_

## SUSTAINABILITY STATEMENT

### Workforce Development Board Strategic Marketing & Communication Plan

October 2020

The County of Lake is committed to green and sustainable practices and good environmental stewardship. Consequently, we are asking Proposers to provide a Statement of Sustainability to ensure our Proposers are also incorporating sustainability into their firms' practices.

## INSTRUCTIONS

On the following Sustainability Statement form, provide a clear description of your firm's sustainable practices, policies, or procedures. These practices may include, but may not be limited to, the following categories and examples:

Waste Minimization within your office or facilities, such as a recycling programs, double-sided copying, electronic internal communications (i.e. memos), use of recycled-content materials and reusable cups, limiting printing, electronic document management, instituting green purchasing policies, using green cleaning supplies and practices, or reducing packaging in materials you procure or supply.

Energy Efficiency within your office, facilities, or firm, such as lighting retrofits, photo-sensor switches for lighting, effective use of daytime lighting, using Energy Star rated appliances or equipment, using an alternative fuel or having efficient fleet policies, an anti-idling policy, or indoor temperature management (i.e. turning the thermostat up in the summer and down in the winter).

Water Efficiency within the office, facilities, or firm, such as faucet or fixture retrofits, switching from individual bottled water to office water coolers or drinking fountains, and installing drought-tolerant landscaping.

Staff encouraged to adopt sustainable practices and supported by your firm through public transit benefits, bicycle accommodations, telecommuting options, support for green seminar attendance, becoming US Green Building Council LEED accredited, or creating an internal "green team."

Education of your staff about green practices, education of your business peers about your green accomplishments, education of your community by your sustainability, or notice of any environmental awards your firm has achieved.

CONTINUE TO NEXT PAGE

## SUSTAINABILITY STATEMENT

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Attach additional sheets if necessary.

### Waste Minimization

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### Energy Efficiency

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### Water Efficiency

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### Staff

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### Education

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# VENDOR DISCLOSURE STATEMENT

Vendor Name:			
Address:			
Contact Person:		Contact Phone #:	
Bid/RFP/SOI/Contract/Renewal:			

Vendors wishing to contract with Lake County for goods and services in an amount greater than \$30,000 shall submit this form in advance of award. This disclosure statement is not required for utility companies regulated by the Illinois Commerce Commission or local units of government. Vendors shall disclose:

- A familial relationship between a Lake County elected official, department director, deputy director and manager and owners, principals, executives, officers, account managers or other similar managerial positions of the vendor's company. Familial relationship is defined as a spouse (including civil partner), child, stepchild, parent, stepparent, grandparent, in-laws (including parent, grandparent, sibling, or child), relatives and non-relatives living in the same residence, and offspring born to any aforementioned person.
- All political campaign contributions made by the vendor or an owner, principal, executive, officer, account manager, or other similar managerial position of the vendor to any county board member, county board chair, or countywide elected official within the last five years.

If there is nothing to report in a section, please state none in the appropriate space.

## FAMILIAL RELATIONSHIPS

List names and departments/agencies of Lake County employees or public officials with whom owners, principals, or officers of the vendor's company have a familial relationship and the nature of the relationship. Attach additional pages as necessary. (Provide all names or state none in the space below. Do not leave blank.)

Name and Department/Agency of Lake County Employee/Public Official		Familial Relationship

## CAMPAIGN CONTRIBUTIONS

List campaign contributions that have been made within the last five years that exceed \$150 annually. Attach additional pages as necessary. (Provide all names or state none in the space below. Do not leave blank.)

Recipient	Donor	Description (e.g., cash, type of item, in-kind service, etc.)	Amount/Value	Date Made

Continuing disclosure is required if information changes. This Vendor Disclosure Statement form is available at [www.lakecountyil.gov](http://www.lakecountyil.gov).

The full text of the County's Ethics and Procurement policies and ordinances are available at [www.lakecountyil.gov](http://www.lakecountyil.gov).

I hereby acknowledge that the information above is accurate and complete, that I am an authorized signer on behalf of the vendor, that I have read and understand these disclosure requirements, and that I agree to update this information if there are any related changes by submitting a new Vendor Disclosure Statement.

Authorized Signature:		Title:	
Printed Name:		Date:	

Vendors must insert "x" in the following box indicating exception and provide a brief narrative for exception.

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