

**Request for Qualifications (RFQ)  
for a**

***Comprehensive Identity & Resource Development Strategy***

Heritage Valley Partners, Inc., a 501 (C) 3 non-profit corporation, seeks proposals from qualified firms to provide services relating to the creation of development campaign materials.

**Heritage Valley Partners, Inc.**

**Brian Cali, Chairman**

**Natalie Gelb Solfanelli, Executive Director**

**August 18, 2010**

**Deadline for submissions: September 10, 2010, 3:00 PM EST**

*Questions must be submitted via e-mail only no later than September 3, 2010, to [dperry@lhva.org](mailto:dperry@lhva.org). Questions and subsequent responses pertaining to this RFQ will be distributed to all respondents on September 8, 2010. LHVA will not accept, nor respond to, questions submitted via any other method.*

## **I. General Information**

### **a. Background**

Heritage Valley Partners, Inc. (HVP) is an IRS registered 501 (C) 3, nonprofit corporation established in 2009 as the development arm of the Lackawanna Heritage Valley Authority (LHVA), the management entity of the Lackawanna Heritage Valley, a State and National Heritage Area. HVP supports the mission of LHVA through fund development and through the support of Ambassadors in Action, LHVA's volunteer organization. HVP is working to expand opportunities for funding for LHVA's wide range of projects, programs, and events. The cooperation and collaboration between LHVA and HVP strengthens the sustainability and effectiveness of the heritage area.

### **b. Overview of Services Requested and the Submission Process**

HVP seeks the services of a qualified firm to provide the expertise and materials necessary to create a successful development campaign that identifies and addresses the major goals delineated by the HVP Board of Directors.

HVP reserves the right to select one or more firms to provide all or part of the services requested in this RFQ. To be considered, interested firms must submit complete proposals that include all required information as detailed in Section III of this RFQ. In the event it becomes necessary to revise any part of this RFQ, revisions will be provided by addenda and e-mailed to all respondents.

Proposals should provide a straightforward, thorough, and concise description of the firm's experience, capabilities, and approach. Submit six (6) copies of the proposal. Proposals should be individually bound in a single document that includes all accompanying materials—with the exception of the fee proposal (see Section III c).

Firms submitting a proposal may be asked to give an oral presentation of their proposal. The purpose of the oral presentation is to clarify or elaborate on the proposal, but will in no way change the original submission. Requests for an oral presentation shall not be constituted as acceptance of a particular proposal.

Proposals must be received no later than 3 PM, September 10, 2010. Proposals may be mailed or hand delivered to:

Heritage Valley Partners, Inc.  
Scranton Life Building  
538 Spruce St.  
Scranton, PA 18503  
Attn: Resource Development Strategy

HVP reserves the right to reject any or all proposals submitted if such election is deemed to be in their best interest. HVP assumes no obligation, responsibility, and/or liability for costs incurred by responding firms prior to the issuance of a contract.

The current schedule for the selection process is as follows:

- August 18, 2010—RFQ issued
- September 3, 2010—Deadline to submit questions
- September 10, 2010—Proposals due at HVP
- September 20 – 22, 2010—Oral presentations conducted (if necessary)
- September 27, 2010—Firm selected

## **II. Anticipated Scope of Services**

HVP seeks one or more firms to assist with the preparation of all materials deemed necessary to execute a public awareness and annual fund raising campaign.

### **a. Purpose**

The primary goal of the Comprehensive Identity & Resource Development Strategy is to research, design, and produce the materials necessary to this effort including: name, theme, and campaign logo development; a campaign folder; a full-color tri-fold campaign brochure; campaign stationery, pledge cards, and envelopes; a campaign video; and development of a fully integrated social media plan.

### **b. Project Area**

The primary project area is Lackawanna County, but may include portions of adjoining counties.

### **c. Scope of Project**

The selected firm will be expected to:

- Produce a Marketing & Resource Development Plan
- Prepare a Resource Development Campaign Case Statement

- Create a Campaign Identity
- Design & Produce a Signature Publication and Campaign Materials

d. Insurance & Ownership

Prior to entering into a contract with HVP, the selected firm will be required to show proof of general business liability insurance and will be required to list the Heritage Valley Partners, Inc., the Lackawanna Heritage Valley Authority, the Commonwealth of Pennsylvania, the National Park Service, and Lackawanna County as additional insured parties for the duration of the project.

Any and all work products submitted as a result of this project will become the property of HVP. Response submissions per the terms of this RFQ likewise become the property of HVP and will not be returned.

**III. Submission Requirements**

Responses must be organized and lettered exactly as they appear in the following outline. Six (6) copies of the bound submission document must be included in the submission package. Addendum material, i.e. work samples, graphic images, etc., may be included.

a. Experience, Structure, Personnel

- i. A brief history of the firm’s experience providing design services to governmental units, economic development entities, National Heritage Areas, not-for-profits, and civic organizations.
- ii. A description of the firm’s organizational structure, including resumes of the principals, project manager(s), and any professional staff who would work directly on this project.
- iii. Samples of at least three (3) comparable projects that the firm has completed in the area of development campaign design within the last five (5) years. Include: project title and location; client name and phone number of contact familiar with the project (for reference); a description of the work including the nature, size, and complexity of the project; and the fee charged by the firm.
- iv. Any other information that reflects the ability of your firm to provide superior design services to entities per this project.

b. Methodological Approach

- i. A description of how the firm intends to address the anticipated scope of services set forth in Section II of this RFQ.
- ii. A statement explaining the firm’s approach to designing successful development campaigns and the approach and techniques that would be employed on this project.

- c. Fee
  - i. Total estimated firm fee for completion of the project and whether the firm would be willing to agree to a cap.
  - ii. The normal hourly rate of each principal and staff member whose name and resume is provided, or whose job category may be needed to complete the project.
  - iii. A list of anticipated reimbursable expenses and the rate charged for each.
  - iv. Any other fees or charges.

Note: The fee proposal must be submitted in a separate, clearly marked, sealed envelope. The fee proposal will not be opened until all proposals have been initially evaluated. Although proposed fees will be considered, the entities reserve the right to negotiate a final fee and/or fee structure with the selected firm.

- d. Contact Information
  - i. On a single sheet in your proposal, please include:
    - 1. The lead firm or individual name and mailing address.
    - 2. The lead firm's anticipated primary contact for this project
    - 3. All contact information (telephone, fax, e-mail) for firm principals and/or individuals who would be working on this project.
    - 4. The year the firm was established and current number of employees.
    - 5. The MBE/WBE (Minority-owned Business Enterprise/Women-owned Business Enterprise) status of the firm(s) as defined by the Commonwealth of Pennsylvania
- e. Additional Information
  - i. Submit a statement describing any potential conflict of interest or appearance of impropriety, relating to officers, directors, and/or employees of HVP that could be created by providing services to HVP.
  - ii. Indicate any pending litigation and/or regulatory action by any oversight body or entity that could have an adverse material impact on the firm's ability to work with the entities.
  - iii. Indicate if the firm has ever had a prior contract with any governmental entity terminated for any reason, and provide an explanation.
- f. Non-discrimination Policy
  - i. Firms with 50 or more employees shall submit a copy of their non-discrimination/affirmative action policy.
  - ii. Firms with less than 50 employees shall submit a statement of their commitment to equal opportunity and affirmative action.

#### **IV. Criteria for Selection**

The following is not necessarily in order of importance:

- a. Experience of the firm in general, and the specific employees who will be working on the project in particular, in producing comparable materials within the past five years.
- b. Quality of work as demonstrated in submitted work samples.
- c. Demonstrated knowledge of development and marketing materials.
- d. Innovative and/or outstanding work by the firm that reflects unique approaches in reaching varied audiences.
- e. Availability of the firm's staff to work with the directors, officers, and staff of HVP.
- f. A clear understanding of nonprofit development and operations.

## **V. Contract Terms & Requirements**

The contents of the proposal prepared by the successful firm(s), with any amendments approved by HVP, will become part of the contract awarded as a result of this RFQ process.

The selected firm(s) will be required to:

- a. Work closely with designated staff, partners, and consultants to provide design services as detailed in this RFQ.
- b. Maintain accurate accounting records and other evidence pertaining to costs incurred in providing services and, upon request, make those records available to HVP at all reasonable times during the contract period and for six (6) years after the date of final payment under terms of the contract.
- c. Assume sole responsibility for the complete effort as required by this RFQ, and be the sole point of contact with regard to contractual matters.
- d. Refrain from assigning, transferring, conveying, subletting or otherwise disposing of the contract or its rights, titles or interest therein or its power to execute such agreement to any other person, firm, partnership, company, or corporation without the prior written consent of HVP.
- e. Comply with all applicable law governing projects initiated or supported by HVP.

HVP reserves the right to hire more than one firm to fulfill the tasks contained in this RFQ. Responding firms must specify which services they are proposing to provide. HVP will review all proposals without prejudice regarding which services are proposed.

HVP may terminate any contract entered into as a result of this RFQ at any time, provided that written notice has been given to the firm at least thirty (30) days prior to such proposed termination. Upon termination, fees will be prorated based on the work completed and accepted by the entities.