



# REQUEST FOR PROPOSALS

SRTA SOLICITATION # 22-009

## STATE ROAD AND TOLLWAY AUTHORITY MARKETING AND CUSTOMER ENGAGEMENT CONSULTING SERVICES

### Schedule of Events

Issue date	July 29, 2021
Round 1 deadline for submitting questions	August 9, 2021 (2:00 PM ET)
Posting of official answers	August 16, 2021
RFP Response due date	August 31, 2021 (2:00 PM ET)
Interviews	TBA (On or about Week of September 20)
Notice of Intent to Award	On or about September 27, 2021
Notice of Award	On or about October 8, 2021



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## Acronyms and Abbreviations

**ATL** – Atlanta-Region Transit Link Authority

**RFP** – Request for Proposals

**SRTA** – State Road and Tollway Authority

**OCE** – Office of Communications and Engagement

## Definitions

**Agreement or Contract** means the binding Contract entered into with the firm selected as a result of this RFP between the SRTA and Contractor, as applicable.

**Business Day** means Monday through Friday, excluding State-recognized holidays.

**Contractor** means the company that undertakes the Contract to perform Services.

**Day(s)** means calendar days unless otherwise specified in the Contract as a Business Day.

**Request for Proposals** means this RFP any addenda thereto.

**Services** means all labor, materials, equipment, and expertise needed to successfully provide those deliverables described in the RFP.

Wherever the word “including,” “include,” or “includes” is used in the RFP, it shall be deemed to be followed by the words “without limitation”

## PART 1 -SOLICITATION, OFFER AND AWARD

### 1 General Information

#### 1.1 Purpose of Procurement

The purpose of this solicitation is to request proposals from qualified consulting firms interested in providing Marketing and Customer Engagement consulting services to the State Road and Tollway Authority (SRTA). The contract term is anticipated to be through June 30, 2022, with three annual renewal options.

The procurement of Marketing and Customer Engagement consulting services will be conducted using competitive proposal procedures. All Proposers to this RFP are subject to the instructions communicated in this document, as may be amended, and are cautioned to review the entire RFP and carefully follow the instructions herein.

The selected Contractor will provide a range of marketing, communications, and customer engagement services to SRTA as further detailed in the Scope of Services. The Scope of Services consists of furnishing all labor, machinery, tools, means of transportation, supplies, equipment, materials, safety equipment, Services and incidentals required to deliver the Scope of Services beginning with Section 5 and to also include Section 3.6 of this RFP.

The Services to be performed correspond to the following National Institute of Government Purchasing (NIGP) general commodity codes:

- 91876 – Marketing Consulting
- 91824 – Communications Consulting

A complete copy of the RFP document can be accessed on:

- (1) Georgia Procurement Registry website at [http://ssl.doas.state.ga.us/PRSapp/PR\\_index.jsp](http://ssl.doas.state.ga.us/PRSapp/PR_index.jsp)
- (2) SRTA website at: <https://www.srta.ga.gov/procurement/>
- (3) Important notifications leading up to the RFP Submission Deadline will be posted to the same sites

#### 1.2 Type, Term of Contract, and Contract Amount

The Contractor shall perform all Services as called for in this RFP and the Contract, and as called for in any subsequent amendments through June 30, 2022, as set out in the Contract. SRTA shall retain the option of renewing the Contract for up to three (3), one-year renewal periods. Any Contract renewals shall be at the sole discretion of SRTA and shall be made in writing and executed by both parties. The Contractor's price proposal submitted in response to this solicitation will remain in effect in the event SRTA exercises any renewal options.

SRTA anticipates one (1) contract to be awarded under this RFP. During the term of the contract, SRTA will issue task orders for each project as needed. No minimum or maximum amount of work is guaranteed under this solicitation, and work will be procured on an "as-needed" basis.

This total spend for all Task Orders issued under this RFP is not expected to exceed \$1,095,000 over the entire contract term (including renewals), with an estimated \$350,000 of spend in Year 1.

### 1.3 Federal Participation in Contract

Reserved.

### 1.4 Solicitation Schedule

The times contained throughout this solicitation represent local Atlanta time.

Issue date	July 29, 2021
Round 1 deadline for submitting questions	August 9, 2021 (2:00 PM ET)
Posting of official answers	August 16, 2021
RFP Response due date	August 31, 2021 (2:00 PM ET)
Interviews	TBA (On or about Week of September 20)
Notice of Intent to Award	On or about September 27, 2021
Notice of Award	On or about October 8, 2021

Proposals submitted in response to SRTA Solicitation No. 22-009 must be received no later than **2:00 PM Eastern Time (ET) on August 31, 2021**, to ensure that they are evaluated for contract award by the Evaluation Committee for this procurement. Proposals received after the deadline will not be evaluated.

### 1.5 Restrictions on Communications with SRTA and ATL

From the date of issuance of this solicitation through the date of Contract award, excepting the Interviews, Proposers are not allowed to communicate for any reason with SRTA or ATL employees, any participants in this procurement, or any SRTA or ATL Board Members regarding this procurement. All Proposer communications concerning this solicitation should be directed to the Issuing Officer. Prohibited communication includes all contact or interaction regarding this solicitation, including, but not limited to, telephonic communications, emails, faxes, letters, texts, or personal meetings. Unauthorized contact regarding this solicitation may result in disqualification.

Oral communications regarding this solicitation shall not be considered official communications. SRTA and ATL are not responsible for any oral statements made by their employees regarding this solicitation. All official communications to and from SRTA and ATL regarding this solicitation shall be transmitted in writing.

### 1.6 Contact Information

All inquiries, offers, submissions, and/or other correspondence regarding this solicitation (excluding protests submitted in accordance with Section 2.9 below) must be directed in writing to:

Jennifer Ward, Issuing Officer  
State Road and Tollway Authority  
245 Peachtree Center Avenue NE, Suite 2200  
Atlanta, GA 30303

Issuing Officer Email: [srtaprocurement@srtaga.gov](mailto:srtaprocurement@srtaga.gov)

Proposal Submission Link: <https://www.dropbox.com/request/9JIfoizUIU1slMj5Xbay>

## 2 Terms and Conditions/Instructions to Proposers

### 2.1 Deadline for Submission of Proposals/Late Proposals

Proposals submitted in response to SRTA Solicitation No. 22-009 must be received by SRTA by the deadlines posted in 1.4 and under "Schedule of Events" to ensure that they are evaluated for Contract award by the

Evaluation Committee for this procurement. Proposals received after published submission deadlines will not be evaluated.

## 2.2 Format of Proposals

Each Proposer shall submit its response in digital format in Microsoft Word, searchable PDF, or Excel as applicable. The response shall consist of all completed and signed Offer Documents and supporting documentation requested in this RFP.

All responses shall be submitted in a **singular folder** in Dropbox and labeled as follows:

*SRTA RFP 22\_009 [Company Name] Response*

The above folder (in Dropbox) must be divided into two subfolders as follows:

- 1) **Sub-Folder #1: Offer Documents 1– 18.** Documents 1-18 should be compiled into a single pdf file. The Sample Materials described in 3.6.3 can be separate from documents 1-18 but must be labeled clearly using the nomenclature described in 3.6.3.

Folder Name: *SRTA RFP 22\_009 [Company Name] Proposal*

- 2) **Sub-Folder #2: Price Proposal,** using the Excel template provided as Attachment 4.

Folder Name: *SRTA RFP 22\_009 [Company Name] Price*

The proposal must be submitted to the Issuing Officer by the Submission Deadline in order for the Proposer's submission to be eligible for evaluation and consideration for Contract award.

If a Proposer submits an affidavit referred to in Section 2.7 (Confidential/Proprietary Information), Proposer must provide one (1) separate electronic copy in searchable PDF format of its proposal labeled "SRTA Solicitation No. 22-009: [Proposer Name] [Copy of Non-Confidential Portion of Proposal]" that excludes any records attached to such affidavit, with no file to exceed 50MB.

All proposals must be prepared and submitted in accordance with the proposal format and content requirements specified. The included required forms may be completed by using the free Adobe Reader software available at <http://get.adobe.com/reader/>. Proposals must be in English.

As a condition of submission responsiveness, all offer documents that require the signature of Proposer must be signed. Any Contract award made as a result of this solicitation shall bind the Proposer to all of the terms, conditions, and specifications set forth in this RFP.

## 2.3 Location for Submission of Proposals/Methods of Delivery

Proposals must be submitted exclusively to the Issuing Officer at the Dropbox proposal submission address noted in Section 1.6. It is the sole responsibility of the Proposer to ensure that its proposal is successfully delivered to SRTA by the specified date and time. **SRTA is not responsible for late file transfers/submittals for any reason.** Proposers may email the Issuing Officer at the email address in Section 1.6 in order to acknowledge receipt; however, the completeness or readability of the submittal cannot be confirmed. Due to the potential volume of proposals received, immediate acknowledgement should not be expected.

Failure to clearly label all files may result in the proposal being discovered and/or opened late. SRTA is not responsible for proposals discovered and/or opened late due to Proposer's failure to mark the proposal as specified. Proposals received after the Proposal Submission Deadline, due to late delivery or late discovery due to Proposer's failure to mark the proposal as specified, may result in SRTA disqualifying the proposal from consideration for Contract award.

For common technical questions on Dropbox submittals, Proposers should review the Dropbox information



at the following link:

<https://help.dropbox.com/files-folders/share/received-file-request>

## 2.4 Questions

Questions regarding the RFP must be submitted in writing, defined as being received via letter on official firm/agency letterhead or by electronic mail in accordance with Section 1.4 - Solicitation Schedule. Written questions must be submitted to the attention of the Issuing Officer in accordance with Section 1.5 and 1.6 above.

The final Contract that SRTA expects to award as a result of this RFP is attached hereto as Attachment 3 to this RFP.

Please review the Contract and submit any and all questions, clarifications and recommendations to the Issuing Officer by the deadline dates and time specified in this RFP. All questions, clarifications, and recommendations must be submitted using Attachment 1-Questions and Answers Template.

Should there be any changes made to the Contract as a result of requests received, SRTA shall post a Final Contract via formal addendum. Absent the issuance of a formal addendum containing a Final Contract, Proposers should plan on the Contract terms and conditions as attached hereto as Attachment 3. Answers to all questions received by the applicable deadline will be posted to:

- (1) Georgia Procurement Registry website at [http://ssl.doas.state.ga.us/PRSapp/PR\\_index.jsp](http://ssl.doas.state.ga.us/PRSapp/PR_index.jsp)
- (2) SRTA website at: <https://www.srta.ga.gov/procurement/>

It is the sole responsibility of the Proposer to make itself aware of responses to written questions the Proposer has submitted. Responses to questions are provided as information only and do not in any way alter the contents of the solicitation inclusive of the Scope of Services, the remainder of the RFP documents, or the Contract. Revisions to the solicitation or to the Contract shall be made only via formally issued addenda. Only such written addenda posted online shall constitute revisions to the solicitation.

## 2.5 Amendments to the Solicitation (Addenda)

SRTA reserves the right to revise or amend the RFP up to the time set for the submission of proposals. Such revisions and amendments, if any, shall be announced by written addenda to the RFP. Upon issuance, addenda will be considered part of the RFP and will prevail over inconsistent or conflicting provisions contained in the original RFP. Copies of all addenda will be made available for download on:

- (1) Georgia Procurement Registry website at [http://ssl.doas.state.ga.us/PRSapp/PR\\_index.jsp](http://ssl.doas.state.ga.us/PRSapp/PR_index.jsp)
- (2) SRTA website at: <https://www.srta.ga.gov/procurement/>

SRTA will not be responsible for a potential Proposer failing to receive notification of the availability of addenda. **EACH PROPOSER IS INDIVIDUALLY RESPONSIBLE FOR REVIEWING ADDENDA AND ANY OTHER POSTED DOCUMENTS AND MAKING ANY NECESSARY OR APPROPRIATE CHANGES TO THE PROPOSER'S RESPONSE PRIOR TO SUBMISSION.** It is the sole responsibility of each potential Proposer to check the SRTA and Georgia Procurement Registry websites daily for addenda.

If an addendum significantly changes the RFP, the date set for the submission of proposals may be postponed by such number of days as in the opinion of the SRTA deems suitable to enable potential Proposers to revise their proposals.

Proposers shall acknowledge receipt of all addenda by completing and submitting Offer Document #3 (Acknowledgement of Addenda to RFP), included as Offer Document #3 in Attachment 2 of this RFP and

described in Section 3.3, as part of its proposal. As with other required documentation, proposals that fail to reference receipt of addenda by inclusion of Offer Document #3 (Acknowledgement of Addenda to RFP) may be excluded from consideration for a contract award.

## 2.6 Single Response to the Solicitation (Reserved)

## 2.7 Confidential/Proprietary Information

Any and all materials submitted in response to this RFP are subject to public inspection, pursuant to the provisions of O.C.G.A. § 50-18-70 et seq., Georgia's Open Records Act, upon completion of the RFP process. Each Proposer will be responsible for clearly identifying and labeling any records contained in its proposal as "trade secret" that the proposer has reasonably determined meet the definition of "trade secret" under Section 10-1-761(4) of the Georgia Code and that the proposer wishes to be exempt from disclosure under Section 50-18-72(a)(34) of the Georgia Code or any other applicable law. The Proposer must attach to its proposal an affidavit affirmatively declaring that specific information in the Records constitutes trade secrets pursuant to Article 27 of Chapter 1 of Title 10 of the Georgia Code.

If SRTA receives a request for public disclosure of all or any portion of the materials identified as "trade secrets" in a proposal in accordance with this RFP, before producing such records in response to such request, SRTA shall notify the Proposer of its intention to produce such records. If SRTA makes a determination that the specifically identified information does not in fact constitute a trade secret, it shall notify the Proposer of its intent to disclose the information within ten (10) Days unless prohibited from doing so by an appropriate court order. If the Proposer wishes to prevent disclosure of the requested Records, the Proposer may file an action in Fulton County Superior Court to obtain an order that the requested records are trade secrets exempt from disclosure. The Proposer shall serve the requestor with a copy of its court filing. If SRTA makes a determination that the specifically identified information does constitute a trade secret, SRTA shall withhold the records, and the requester may file an action in Fulton County Superior Court to obtain an order that the requested records are not trade secrets and are subject to disclosure.

Proposers are advised that their designation as "trade secret" will not be binding on SRTA or determinative of any issue relating to confidentiality. SRTA will not accept blanket designations that do not clearly identify information and materials that are "trade secrets." SRTA may, in its sole discretion, and subject to compliance with the Open Records Laws and other applicable law, treat the whole of the relevant Section(s)/document(s) that are subject to such a blanket designation as subject to disclosure pursuant to the Open Records Laws.

All material submitted regarding the RFP becomes the property of the SRTA. Any activity pursuant to this RFP by any Proposer is governed by all applicable laws, including without limitation, Georgia and Federal antitrust laws. SRTA is not responsible to return to a Proposer any or all of the proposal or other information furnished by that Proposer.

In no event will the State, SRTA, ATL, or any of their agents, representatives, consultants, directors, officers or employees be liable to a Proposer or subcontractor for the disclosure of all or a portion of any proposal submitted in response to this RFP.

Nothing contained in this provision shall modify or amend requirements and obligations imposed on SRTA or any other State entity by the Open Records Laws or other applicable law, and the provisions of the Open Records Laws or other laws shall control if there is a conflict between the procedures described above and the applicable law.

## 2.8 Reserved Rights

In connection with this solicitation, SRTA reserves to itself all rights (which rights are exercisable by SRTA in its sole discretion) available under Procurement Policy and applicable law, including without limitation, with

or without cause, and with or without notice, the right to:

- (1) modify the procurement process or documentation described in this RFP;
- (2) develop the project in any manner that it, in its sole discretion, deems necessary or desirable
- (3) cancel this RFP, or a subsequent RFP, in whole or in part at any time prior to the execution by the SRTA of the Contract, without incurring any cost obligations or liabilities except as otherwise expressly stated in this RFP or the subsequent RFP;
- (4) issue a new RFP after cancellation of this RFP or a subsequent RFP;
- (5) not issue an RFP;
- (6) reject any and all submittals, responses, and proposals at any time;
- (7) reject any and all proposals or any portion of a specific proposal for any reason;
- (8) modify all dates set or projected in this RFP;
- (9) terminate evaluations of proposals at any time;
- (10) issue amendments, supplements, and modifications to this RFP;
- (11) appoint Evaluation Committees to review proposals, and seek the assistance of outside technical experts and consultants in Proposal evaluation;
- (12) revise the evaluation criteria or methodology by issuing an amendment prior to the proposal Deadline;
- (13) require confirmation of information furnished by a Proposer, require additional information from a Proposer concerning its proposal and require additional evidence of qualifications or ability to perform the work described in this RFP;
- (14) down-select to one or multiple Proposers or add additional down-selection phases;
- (15) seek or obtain data from any source that has the potential to improve the understanding and evaluation of the responses to this RFP;
- (16) add or delete Proposer responsibilities from the information contained in this RFP;
- (17) negotiate contract terms contemporaneously and /or subsequently with any number of proposers as SRTA deems to be in its best interests;
- (18) waive administrative or minor deficiencies in a Proposal, accept and review a non-conforming proposal or permit clarifications or supplements to a Proposal;
- (19) disqualify any Proposer who changes its proposal without approval;
- (20) disqualify any Proposer from the procurement process for violating any rules or requirements of the procurement specified in this RFP, the RFP, applicable law, or any other communication from SRTA;
- (21) add to the shortlist of Proposers any Proposer that submitted a Proposal in order to replace a shortlisted Proposer that withdraws or is disqualified from participation in this procurement;
- (22) (as and solely to the extent applicable) adjust the terms of, or not pursue federal financing

programs, or adjust the terms of, or not pursue other financing or public funding for the Project on behalf of the Proposers, or otherwise;

- (23) develop some or all of the Project itself or through another state or local government entity or entities;
- (24) disclose information submitted to SRTA as permitted by applicable law or this RFP;
- (25) exercise any other right reserved or afforded to SRTA under this RFP or a subsequent RFP and applicable law; and
- (26) exercise its discretion in relation to the matters that are the subject of this RFP as it considers necessary or expedient in light of all circumstances prevailing at the time that SRTA considers to be relevant.

This RFP does not commit SRTA to enter into the Contract or proceed with the procurement described in this RFP. SRTA, ATL, and the State assume no obligations, responsibilities or liabilities, fiscal or otherwise, to reimburse all or part of the costs incurred or alleged to have been incurred by parties considering a response to or responding to this RFP, or any subsequent RFP. All such costs shall be borne solely by each Proposer.

Except as provided in this RFP, in no event will SRTA be bound by, or liable for, any obligations with respect to the Project until such time (if at all) as the Contract has been authorized by SRTA and executed by SRTA, and then, only to the extent provided in the Contract. No Proposer shall have any cause of action against SRTA arising out of the methods by which proposals are evaluated.

SRTA has the sole right to select the successful proposal(s) for contract award(s); to split a contract where allowable; to cancel the solicitation and to advertise for new proposals; to award a contract(s) to other than the Proposer submitting the lowest price proposal; to award multiple contracts; or not to award a contract as a result of this RFP.

SRTA reserves the right to accept any proposal deemed to be in the best interest of SRTA and to waive any irregularity or informality in any proposal that does not prejudice SRTA or other Proposers.

SRTA reserves the right to negotiate with the Proposer whose proposal is considered by SRTA, and in its sole discretion, to be the most advantageous to SRTA.

## 2.9 Protest Policy

SRTA's protest policy shall govern this solicitation, and it can be found at:

<https://www.srta.ga.gov/procurement/>

## 2.10 Disadvantaged Business Enterprise (DBE) Participation

It is SRTA's policy to practice nondiscrimination based on age, disability, race, gender, color, sex, religion or national origin in the award or performance of this Contract. All companies qualifying under this solicitation are encouraged to submit proposals. The requirements of this solicitation apply for all Proposers, including those who qualify as a Disadvantaged Business Enterprise (DBE). Proposers with questions regarding DBE certification may contact the Issuing Officer.

SRTA strongly encourages the use of qualified DBEs ready, willing and able to perform the work set forth in the Scope of Services. Toward continuing the objective of encouraging DBE participation, SRTA requires proposers to submit a broad outline of their DBE Participation Plan, further described in Section 3.9, to be submitted with Offer Document #9.

The DBE Directory identifying all firms eligible to participate as DBEs is maintained by the Georgia Department of Transportation (Georgia DOT) in relation to the Uniform Certification Program (UCP). Proposer or subcontractors seeking to participate as DBEs must be certified at the time of proposal submittal.

To access the Georgia DOT DBE Directory, please visit: <http://www.dot.ga.gov/PS/Business/DBE>.

The status of a company as a Disadvantaged Business Enterprise is subject to change. Proposer shall be solely responsible for reviewing and utilizing the most current version of the DBE Directory to ensure that any company listed in its proposal as a Disadvantaged Business Enterprise is certified at the time of proposal submission.

As an incentive to increase utilization of minority-owned businesses as subcontractors on State purchases, the State of Georgia provides for an income tax adjustment on the state tax return of any company that subcontracts with a State certified minority-owned firm to furnish goods, property, or services to the State of Georgia. The Tax Incentive Program is codified at O.C.G.A. §48-7-38 and is managed by the Georgia Department of Revenue.

## 2.11 Small Business Participation

SRTA strongly supports the participation of small business owners in their contracts. It is the policy of SRTA to ensure nondiscrimination in the award and administration of USDOT-assisted contracts. It is the intention of SRTA to create a level playing field on which Small Businesses can compete fairly for contracts and subcontracts relating to its construction, procurement and professional services activities.

## 2.12 Ethical Standards

It is a breach of ethical standards for any SRTA or ATL employee to participate directly or indirectly in a procurement when the employee knows:

- (1) The employee or any member of the employee's immediate family has a financial interest pertaining to the procurement;
- (2) A business or organization in which the employee, or any member of the employee's immediate family, has a financial interest pertaining to the procurement; or
- (3) Any other person, business or organization with whom the employee or any member of employee's immediate family is negotiating or has an arrangement concerning prospective employment is involved in the procurement.

SRTA and ATL employees are also bound by the Georgia Governor's Executive Order, dated April 1, 2021, for "Establishing a Code of Ethics for the Executive Branch of State Government." The Executive Order prohibits SRTA/ATL and SRTA/ATL employees, or any person acting on their behalf, from accepting, directly or indirectly, any gift from any person with whom the employee interacts on official SRTA or ATL business. Therefore, it is unlawful for a potential Proposer, or its subcontractors or suppliers, to make gifts or favors to any SRTA or ATL employee. It is also unlawful for any SRTA or ATL employee to accept any such gift or favor. In addition, any persons acting as members of the Evaluation Committee for this procurement shall, for the purposes of this procurement, be bound by the referenced Executive Order.

Throughout the proposal evaluation and award process and subsequent contract negotiations, Proposers shall not discuss or seek specific information about this procurement, including but not limited to, the contents of submissions, the evaluation process or the contract negotiations, with members of the Evaluation Committee, the SRTA and ATL Board of Directors, or SRTA or ATL employees other than the Issuing Officer.

## 2.13 ADA Guidelines

SRTA adheres to the guidelines set forth in the Americans with Disabilities Act. Proposers should contact the Issuing Officer at least one Day in advance if they require special arrangements when attending a Hosted site visit (if a Hosted site visit is scheduled).

## 2.14 Contractual Relationships

SRTA intends to execute a Contract, included as Attachment 3 to this RFP. The selected Contractor's contractual responsibility must solely rest with one firm or legal entity, which shall not be a subsidiary with or affiliate with limited resources. Proposer's Proposal Letter, included as Offer Document #2 of this RFP, must clearly indicate the firm or entity responsible for contract execution.

SRTA shall not be a party to agreements between the selected Contractor(s) and any subcontractors it may choose to employ during fulfillment of the Contract. Additional requirements related to subcontractors are specified in the Contract.

## 2.15 Proposal Withdrawal and/or Revision Following Submission

A submitted proposal may be withdrawn and changes to a submitted proposal can be made prior to the Proposal Submission Deadline. In the event a Proposer notes an error or omission in its response which was overlooked prior to submitting the proposal, the Proposer may contact the Issuing Officer to request the proposal withdrawn. Once the Proposer's response is withdrawn, there is no response from the Proposer. Unless and until the Proposer resubmits the received response, SRTA will have no offer from the Proposer to evaluate for possible Contract award. Any resubmission must be received no later than the Proposal submission deadline.

## 2.16 Proposer Conflicts of Interest

Proposer must disclose in detail, with the Proposal, anything that may create a conflict or appearance of a conflict of interest. For purposes of this RFP, "conflict of interest" means any situation or circumstance arising out of existing or past activities, business interests, familial relationships, contractual relationships or organizational structure (i.e., parent entities, subsidiaries, affiliates, subconsultants, etc.) or litigation where: 1.) Proposer, a key team member or Key Personnel could or could be seen to exercise an improper influence over the objective, unbiased and impartial exercise of SRTA independent judgment; or 2.) could or could be seen to compromise, impair or be incompatible with the effective performance of its obligations under the resulting Contract.

Required disclosures include but are not limited to: 1.) any current contractual relationships with SRTA or ATL or any of their employees or board members; 2.) any past, present or planned contractual or employment relationships with any officer or employee of SRTA or ATL; and 3.) any other circumstances that might be considered to create a financial interest in the Contract by SRTA or ATL or any of their respective employees or board members if Proposer is awarded the Contract. The foregoing list is a demonstrative list and shall constitute a limitation on the Proposer's disclosure obligations.

SRTA, in its sole discretion, will make a determination relative to a real or perceived potential conflict for a Proposer and its ability to mitigate such a conflict. A Proposer found to have a Conflict of Interest that cannot be mitigated, as determined in the sole discretion of SRTA, shall not have its proposal submission evaluated for Contract Award.

Failure to comply with the requirements in this Section 2.16 or to abide by SRTA's determination in this matter may result in disqualification of the Proposer from submitting a proposal, disqualifying the offending team member from participating on a Proposer's team or, following submission of a proposal, discontinuing

further consideration of such Proposer and its proposal.

Conflicts of interest that arise after the Proposal submission deadline, but before the Notice of Award, must be disclosed in detail in writing to the Issuing Officer.

Failure to adhere to these provisions or any of governing ethics or conflict of interest requirements may result in the Proposing Entity (or their proposal) being disqualified or ineligible for award.

## 2.17 Contractual Provisions

The Contract to be executed between the selected Contractor and SRTA has been included in Attachment 3. Any conflicting language shall be resolved prior to the execution of a final agreement with the selected Contractor. SRTA has no obligation to approve exceptions or changes to the Pro Forma contract.

SRTA reserves the right to modify the Pro-Forma Contract and/or include additional contractual provisions in the Contract at its sole discretion.

## 2.18 Registered Lobbyists

By submitting a response to this RFP, the Proposer hereby certifies that the Proposer and its lobbyists are in compliance with the Lobbyist Registration Requirements in accordance with the Georgia Government Transparency and Campaign Finance Commission.

## 2.19 Responsibility for Compliance with Legal Requirements

Proposer's products, services, and facilities shall be in full compliance with any and all applicable federal, state, and local laws, regulations, ordinances, and standards regardless of whether or not they are referred to in this RFP.

## 2.20 Conditional Proposals

Terms and conditions attached to a proposal by a Proposer and made a condition of Contract execution may render the proposal non-responsive and may be rejected.

## 2.21 Period that Proposals Remain Valid

Each Proposer agrees that proposal will remain firm for a period of one hundred and eighty (180) Days beginning with the date that price proposals are opened. Following the deadline for proposal submission, no proposal may be withdrawn for a period of 180 calendar days. For reasons of sustaining validity of potential desirable proposals to the fullest extent, the SRTA may extend the Restriction of Communication and delay any post-award debriefings, to the extent allowed, as it deems necessary.

Requests for withdrawal of proposals after 180 Days following the deadline for proposal submission must be submitted in writing (defined as being sent or received via letter on official firm/agency letterhead or by electronic mail) to the attention of Issuing Officer.

## 2.22 SRTA's Right to Request Additional Information-Contractor Responsibility

Prior to award, SRTA must be assured that the selected Contractor has all of the resources to successfully perform under the Contract. This includes, but is not limited to, adequate number of personnel with required skills, availability of appropriate equipment in sufficient quantity to meet the on-going needs of SRTA, financial resources sufficient to complete performance under the Contract, and relevant experience in similar endeavors. If such information is required, the Contractor will be so notified and will submit the information requested within the time requested.

## 2.23 Sales and Use Taxes



SRTA is exempt from paying sales and use taxes.

## 2.24 Proposal Preparation Costs

Each proposal should be prepared simply and economically, avoiding the use of elaborate promotional materials beyond those sufficient to provide a complete proposal. All costs of proposal preparation, attendance at Hosted site visits and/or pre-award meetings, and any other pre-award costs shall be at Proposer's sole cost and expense. SRTA will not provide reimbursement for any costs associated with proposal preparation.

## 2.25 Placeholders

If a Proposer does not include information or materials in its proposal that are described in the relevant submittal requirements in Section 3 because the required information or materials are not applicable to that Proposer, the Proposer must include in the relevant Section in its proposal a statement to the following effect: "Section[s] [ ] of the ----- do[es] not apply because [Proposer to insert brief explanation]."

## 2.26 No Geographic Preference

This procurement will be conducted in a manner that prohibits the use of statutorily or administratively imposed in-State or local geographic preferences in evaluation of proposals or award of contracts, except where Federal statutes expressly mandate or encourage geographic preference. This does not pre-empt State licensing laws.

## 2.27 Modification of Proposals

Except at the written request of the SRTA, no proposal may be modified after the deadline for proposal submission.

# 3 Contents and Instructions

All Proposals should include a table of contents with page numbers and sufficient detail to facilitate easy reference to all requested information. Proposer shall not utilize a font size smaller than 10pt font or have margins that are less than 1-inch. To be eligible for evaluation as a complete, responsive proposal in response to SRTA Solicitation No. 22-009, any and all proposals submitted must contain all of the following documents, properly signed by an authorized representative (as applicable), fully completed by the Proposer, and numbered and arranged in the following order:

## 3.1 Complete Proposal Checklist

This document serves as a checklist for Proposers to ensure that their proposal is complete and ready for submission. The document is used by SRTA during the evaluation of responsiveness of proposals.

This document must be fully completed, signed by an authorized representative, and submitted with the proposal. The blank checklist form is attached in Attachment 2 as Offer Document #1 of this RFP.

## 3.2 Proposal Letter

This document summarizes the acknowledgements and representations made by and agreed to by the Proposer with regard to its proposal.

This document must be fully completed, signed by an authorized representative, and submitted with the proposal. The blank form is attached in Attachment 2 as Offer Document #2 of this RFP.

## 3.3 Acknowledgement of Addenda to the RFP



This document must be fully completed, signed by an authorized representative, and submitted with the proposal.

If no addenda to the RFP were issued, Proposer must still complete the form and include it in its proposal. The blank form is attached in Attachment 2 as Offer Document #3 of this RFQ.

### 3.4 Proposer Information Form

This document summarizes key information about the Proposer for the SRTA's assistance and reference during evaluation of the proposals including:

- (1) Contact Information for Proposer
- (2) Corporate Information
- (3) References for whom Proposer has performed similar services in the past five years
- (4) \*References listed on this document as part of the evaluation of proposals will be contacted
- (5) If Proposer is a certified DBE, proof of DBE certification must accompany this document.

This document must be fully completed, signed, and submitted with the proposal. The blank form is attached in Attachment 2 as Offer Document #4 of this RFP.

\*SRTA will check references at random. For this reason, attention should be paid to the references provided to ensure that the contact information provided is accurate and the individual references are reachable.

### 3.5 Proposer Certifications

This document certifies that the proposal, as provided by the Proposer, will meet or exceed requirements of the RFP.

This document must be fully completed, signed, and submitted with the proposal. The blank form is attached in Attachment 2 as Offer Document #5 of this RFP.

### 3.6 Proposal Contents

#### 3.6.1 Firm Qualifications and Experience

This document shall be provided as Offer Document #6 by the Proposer.

Proposer should label this document as "Offer Document #6 – Firm Qualifications and Experience" in its proposal.

This document shall be provided by the Proposer and shall be a narrative description of the Proposer's qualifications and experience. This narrative description shall include the appropriate use of headings and subheadings that address, at minimum, the following elements:

- Brief description of the Proposer (brief history, number of employees, lines of business, areas of specialization, office locations, organization, etc.);
- Description of the firm's experience in performing work of a similar nature to that solicited in this RFP, specifically public relations/communications/marketing for governmental organizations and/or organizations in the transportation industry, and the participation in such work by the key personnel proposed for assignment to this project;
- Highlight the firm's experience with the work or services identified in Scope of Services; and
- Comprehensive listing and brief descriptions of relevant engagements started and/or completed

during the last five years that are similar in scope and nature to the Scope of Services, attached to this RFP;

- There is no prescribed format for this document. The format of the document shall be at the discretion of Proposer; however, the document shall be limited to no more than fifteen (15) single-side typed pages, font size no smaller than 10 pt, margins no less than 1 inch, line spacing no more than 1.5, and with no more than five (5) pages allocated for graphics and/or designs.

### 3.6.2 Project Team and Project Approach

Proposer should label this document as “Offer Document #6 – Project Team and Project Approach” in its proposal.

This document shall be provided by the Proposer and shall be a narrative description of the Proposer’s project team and approach. This narrative description shall include the appropriate use of headings and subheading that address, at minimum, the following elements:

- Firm’s technical approach to the project and interpretation of the Scope of Services, including the Tasks identified in the Scope of Services section;
- Identify the adequacy of the firm’s resources, including personnel, labor, equipment and supplies, etc.;
- Proposed project approach and plan in response to the Scope of Services;
- Resumes of project team members; and
- Any special or unique benefits that the proposed team and/or its approach brings to the Scope of Services

There is no prescribed format for this document. The format of the document shall be at the discretion of Proposer; however, the document shall be limited to no more than fifteen (15) single-side typed pages, font size no smaller than 10 pt., margins no less than 1 inch, and line spacing no more than 1.5. Team member resumes shall not be counted towards the page limit restriction.

### 3.6.3 Sample Materials

These documents shall be provided by the Proposer. Proposer should label this document as “Offer Document #6 – Sample Materials” in its proposal.

Proposer shall submit **one** sample of **each** the following documents:

- Annual Report
- Brochures/Fact Sheet
- Media Kit
- Print Advertising
- Slide deck (Powerpoint)

These documents should be submitted with the proposal in the following digitally accepted formats: Google Document, PDF, or Z-file.

### 3.7 Contractor Affidavit under O.C.G.A. § 13-10-91(b)(1)

This document must be fully completed, signed by an authorized representative, notarized, and submitted

with the proposal. Blank form is attached in Attachment 2 as Offer Document #7 of this RFP.

### 3.8 Sub-Contractor Affidavit

This document must be fully completed, signed by an authorized representative, and submitted with the proposal. Blank form is attached in Attachment 2 as Offer Document #8 of this RFP.

### 3.9 Subcontractor and DBE Listing Form

This document must be fully completed, signed by an authorized representative, and submitted with the proposal. If any identified subcontractor is a certified DBE, proof of DBE certification must accompany this document. Blank form is attached in Attachment 2 as Offer Document #9 of this RFP.

As an attachment to Offer Document 9, proposers must summarize, in two pages or less, their broad plan toward assisting SRTA in meeting the agency objective to include DBE participation in contracting opportunities. Key areas to be addressed are:

- 1) Proposed commitment levels for each service as described in the Scope of Services
- 2) Strategy for current and continued outreach to DBE firms
- 3) Proposed methodology and frequency of continued mutual review of DBE participation for SRTA projects

The DBE Participation Plan must not exceed two pages and must be submitted on company letterhead and signed by the company representative.

### 3.10 Certification Regarding Debarment and Suspension

This document must be fully completed, signed by an authorized representative, and submitted with the proposal. Blank form is attached in Attachment 2 as Offer Document #10 of this RFP.

### 3.11 Certification Regarding Lobbying

This document must be fully completed, signed by an authorized representative, and submitted with the proposal. Blank form is attached in Attachment 2 as Offer Document #11 of this RFP.

### 3.12 Non-Collusion Affidavit

This document must be fully completed, signed by an authorized representative, and submitted with the proposal. Blank form is attached in Attachment 2 as Offer Document #12 of this RFP.

### 3.13 Anti-Boycott, Divestment and Sanctions Against Israel Certification

This document must be fully completed, signed by an authorized representative, and submitted with the proposal. Blank form is attached in Attachment 2 as Offer Document #13 of this RFP.

### 3.14 Statement of Responsibility Certification

This document must be fully completed, signed by an authorized representative, and submitted with the proposal. Blank form is attached in Attachment 2 as Offer Document #14 of this RFP.

### 3.15 Sales and Use Tax Compliance Form

This document must be fully completed, signed by an authorized representative, and submitted with the proposal. Blank form is attached in Attachment 2 as Offer Document #15 of this RFP.

### 3.16 Litigation History

This document shall be provided by the Proposer and shall be a narrative description of the Proposer's litigation history. Proposer shall identify and describe material local, state and federal proceedings (legal, administrative, regulatory and otherwise, currently pending against the Proposer or its Principals (to include officers, members, directors and partners) or concluded adversely to the Proposer, or its Principals, within the past ten (10) years.

If Proposer has not been involved in any material litigation within the past ten (10) years, Proposer shall provide a written statement indicating such.

Proposer's response to this Section 3.16 shall be clearly marked in Attachment 2 as Offer Document #16.

### 3.17 Termination or Failure to Complete

This document shall be provided by the Proposer and shall be a list of each project on which the Proposer was terminated or failed to complete the delivery of services within the last seven (7) years. For each project, Proposer shall provide: 1.) project name, 2.) project start and end dates, 3.) estimated total contract value (i.e. all work which the Proposer was responsible for), 4.) reason(s) for the contract termination or failure to complete.

Proposer's response to this Section 3.17 shall be clearly marked in Attachment 2 as Offer Document #17.

### 3.18 Financial History

This document shall be provided by the Proposer and shall demonstrate sufficient financial strength, resources and capability to finance the work to be performed and complete the Contract in a satisfactory manner as measured by:

Financial references, including name of proposer's primary financial institutions and address, name of contact person and telephone number for each financial institution identified.

Proposer's response to this Section 3.18 shall be clearly marked in Attachment 2 as Offer Document #18.

### 3.19 Price Proposal (Rate Card)

This document must be fully completed, signed by an authorized representative, and submitted with the complete proposal package in a **separate, singular file** on the Pricing Template provided in Attachment 4.

Proposer's response to this Section 3.19 shall be clearly marked in Attachment 2 as Offer Document #19.

## 4 Proposal Evaluation Process and Contract Award

The following section describes the process by which proposals will be evaluated and a selection made for a potential award. A Selection Committee will be established to review and evaluate proposals submitted in response to this RFP and make a recommendation for award to the Executive Director.

The selection process will be based on a combination of both qualitative technical factors and cost. The award selection will be on a "best value" basis to the responsive and responsible proposer whose proposal is most advantageous and of the greatest value to the SRTA. Accordingly, SRTA may not necessarily make an award to the proposer with the highest technical evaluation criteria ranking nor award to the proposer with the lowest price proposal, if doing so would not be in the overall best interest of SRTA.

### 4.1 Determination of Responsiveness

Proposals will be analyzed for conformance with the instructions and requirements of the RFP as identified in Section 3 and Section 4. Any proposal found to be non-responsive may be withdrawn from further consideration. Only those proposals found to be responsive will be evaluated as described below.

## 4.2 Evaluation of Proposals

The Selection Committee will evaluate all responsive proposals as described below:

**The Completeness of Bid shall be a Pass or Fail.** Only those Proposers that have been determined by the Evaluation Committee to have submitted all required documentation shall receive a 'PASS'. Any Proposer providing an incomplete submittal package will receive a 'FAIL' and will not be evaluated further.

**Phase 1 - Technical Evaluation.** During the first phase of the evaluation, the Selection Committee will have access to all proposal materials except the price proposal/rate card. Using the evaluation criteria that follow, the Selection Committee will evaluate all responsive technical proposals and rank the proposals.

Up to three (3) of the highest-ranking proposers shall advance to the next phase in the evaluation process.

**Phase 2 - Oral Presentations/Interviews.** SRTA, at its sole discretion, may conduct interviews with the Proposers which advanced from Phase 1. The dates and nature of the interview requirements will be communicated to the invited proposers.

The Selection Committee will tabulate the results of the interviews with the results from the previous phase to determine the list of Proposers in the competitive range and their rankings.

Should SRTA elect not to conduct oral presentations/interviews, the evaluation process shall proceed forward with no points being awarded to any Proposer for Phase 2.

**Phase 3 - Price Evaluation.** During the third phase, the Selection Committee will open proposals of those Proposers which have advanced to Phase 3 of the evaluation process, perform a cost evaluation and/or cost realism analysis (if applicable) of each price proposal, and rank the price proposals according to the evaluation criteria below.

The Selection Committee will tabulate the results of the Phase 1 Technical Evaluation ranking, optional Phase 2 Oral Presentations/Interviews, and Phase 3 Price Evaluation.

### 4.2.1 Evaluation Criteria

Proposals will be evaluated based on the following criteria and point valued assigned below:

**Experience and Qualifications** (Maximum 30 points) – Proposer's background and financial stability, company history, employee number, and availability for projects.

**Project Team and Project Approach** (Maximum 40 points) – Proposer's approach to projects of similar size and scope. Proposed team members for this contract.

**References** (Maximum 15 points) – Evaluation committee will consider information submitted in response to Section 3.4 and 3.6.

**Oral Presentation/Demo (Optional)** (Maximum 25 points) – Should SRTA elect to conduct oral presentations/interviews, the basis for selecting proposers to be invited for oral presentations are the scores assigned during the Technical Evaluation for each Proposer. Proposers will be evaluated on the overall quality of their oral presentations.

**Price** (Maximum 15 points) – each Price Proposal will be evaluated by calculating the average rate for all positions/resources on the price/rate card over the course of the term. The lowest average rate for all resources will be awarded the maximum amount of allowable Price Proposal evaluation points, with the evaluated competitor Price Proposals each receiving points correlating to their evaluated differences from the best Price Proposal.

## 4.3 Contract Negotiations and Award

SRTA may enter into exclusive contract negotiations with the highest ranked Proposer to finalize the terms and conditions of the Contract.

Award of any contract as result of this RFP is contingent upon the availability of appropriated, grant, or agency funds. Obligation under any contract resulting from this RFP or the exercise of any renewal option thereunder is contingent upon the availability of such funds. No legal liability on the part of SRTA may arise until such funds are made available for such contract and the Contractor receives notice of such availability to be confirmed in writing by the issuance of a Purchase Order.

An award by SRTA, if made, will be to the highest ranking responsive and responsible proposer, possessing the ability, willingness, and integrity to perform successfully under the terms and conditions of this Contract, that will provide the best value according to the selection process stated above. SRTA reserves the right to make an award as deemed in its best interest, which may include awarding the whole proposal, only part of the proposal, or none of the proposal, based on the sole discretion of its best interest.

SRTA may make such investigations as it deems necessary to determine the ability of the proposer to perform, and the proposer shall furnish to SRTA all such information and data for this purpose as SRTA may request. SRTA reserves the right to reject any proposal if the evidence submitted by, or investigation of, such proposer fails to satisfy that such proposer is qualified to carry out the obligations of the Contract.

A notice shall be posted through the public posting of a Notice of Intent to Award to the SRTA website and the Georgia Procurement Registry. The Notice is not notice of an actual contract award; instead, it is notice of the expected contract award(s) pending resolution of the protest process. The Notice will identify any apparent successful Proposer(s).

SRTA shall contact the apparent successful Proposer(s). The apparent successful Proposer must return a signed copy of the contract to the Issuing Officer within **7 calendar days** of notification. Failure to do so may lead to rejection of the Proposer. SRTA reserves the right to proceed to discussions with the next highest ranked Proposer.

The Notice of Award is the public notice of actual Contract award and will be publicly posted to the SRTA website and the Georgia Procurement Registry.

Any Contract resulting from this RFP will be financed in part with funds available to the SRTA through appropriations from the State of Georgia, revenues, and any other fund source. In the event funding from these sources is eliminated or decreased, SRTA reserves the right to terminate this Contract or modify it accordingly.

#### 4.3.1 Task Orders

Following execution of the Contract, Task Orders will be issued for each specific project qualifying under this RFP on an as-needed basis and at the sole discretion of SRTA. See Attachment 3 – Service Provider Agreement, Exhibit D.

## Part 2 - SCOPE OF SERVICES

### 5 Scope of Services

SRTA considers the services which are envisioned and generally described below to be necessary, and currently intends these items and services, at a minimum, to reflect the Scope for a prospective Contract. The actual, final scope of services, however, may differ, may be greater or lesser, and shall be determined in subsequent processes, including negotiation prior to execution of a prospective Contract with a successful firm.

#### 5.1 Background

The State Road and Tollway Authority is issuing this Request for Proposals (RFP) in order to establish a Contract for Marketing and Customer Engagement Consulting Services. SRTA is seeking responses from qualified and experienced firms interested in providing marketing and customer engagement consulting services which align with SRTA's professional image, goal achievement, and branding. SRTA performs some graphic design work in house as well as some copywriting, strategic planning, marketing promotion development, publication writing and media relations. SRTA will utilize the Contract(s) awarded as a result of this RFP on an as-needed basis. No minimum amount of work is guaranteed.

The successful Proposer will have demonstrated experience in brand building, marketing, public relations, social media marketing, government communications, cause related marketing, transportation initiatives and strategic communications related to transit and tolling systems. Additionally, a successful Proposer may have experience with multiple campaigns, small budgets, and can show quick turnaround efforts.

#### 5.2 Description of Services

SRTA's mission is connecting people, jobs, and communities through preferred mobility options and innovative solutions. SRTA's vision is to be an integral component of Georgia's mobility network and a national leader for innovative transportation. The agency's marketing and communications work supports its mission and vision with strong community partnerships, broad public engagement, education/awareness and mobility and connectivity programs, and initiatives reflective of being a good public steward.

The successful Proposer(s) will perform work in support of the following SRTA goals and objectives in cooperation with SRTA Staff:

- Promote SRTA services that result in increased use of the Express Managed Lane System.
- Increase awareness of the value and benefit SRTA provides to key audiences. This includes area residents, commuters, youth, seniors, employers, community organizations, and other designated stakeholder groups.
- Build and maintain positive relationships with SRTA customers, taxpayers, community partners, and news media, among others.
- Advance the SRTA brand and the delivery of a positive brand promise.
- Inform customers, stakeholders and the general public about SRTA news and activities.
- Position SRTA as a customer-focused, cost effective, and valuable public service agency and as an innovative leader in the public transportation industry.
- Encourage community and stakeholder participation in SRTA's planning efforts and public involvement opportunities.

Examples of specific services to be provided may include, but are not limited to, the following:

- Develop and/or support targeted Peach Pass campaigns and specific market promotions. This may include strategic development, research, and implementation assistance.
- Maintain and update the existing annual report, numerous other service brochures, and collateral materials in both printed and electronic formats.
- Develop promotional materials and support Peach Pass programs.
- Develop advertisements for digital, audio, video and print media.
- Produce graphics for Peach Pass materials (i.e. media kits, info graphs, transponders).
- Develop promotional materials for Peach Pass community and outreach events.
- Develop power point presentations for executive level leadership.
- Create video and vimeos for website and social media platforms.
- Apply community-based social marketing principles to enhance SRTA marketing efforts.
- Assist with social media and mobile applications to maximize effectiveness of marketing activities and stakeholder engagement.
- Support the development, implementation, and evaluation of marketing programs for SRTA’s managed lanes.
- Assist in the negotiation of media buys for print, radio and television.
- Develop SRTA’s Strategic Marketing & Communications Plan. This may include review of the previous plans, identifying marketing messages and channels, and working with SRTA staff on strategic marketing planning for the future.

### 5.3 Contractor Responsibilities

Contractor will, in conjunction with SRTA staff and its partner organizations, develop and implement creative development and marketing and communications solutions for multiple target audiences and a variety of services and initiatives.

Solutions may include, but are not limited to the following:

Marketing & Advertising Campaign Development	Annual/ Progress Reports
MediaKits	Fact Sheets/Brochures
Corporate/Community Sponsorship Programs	e-Newsletters
Creative/Graphic Design	Outdoor Advertising
Marketing and Communications Plan /Crisis Communication Strategies	Photography
Focus Groups	Videography
Media Buys/Media Placement	Press Conferences/Events



Earned Media Strategy	Print, Radio Television Advertising
Media Alerts	Content Development and Editing
Presentations/Talking Points/Speech Writing	Radio and Video/T.V. Scripts
Press Releases	Internet Advertisements
Social Media Strategy and Play Book	Media Training
Marketing Analytics & Research	Peach Pass Advantage and Peach Pass Plus Customer Appreciation/Loyalty Program Marketing

All graphic design work must be provided in a format editable using Adobe Creative Suite and or InDesign. Written documents, data and other materials shall be provided in a format editable using the most current version of Microsoft Office.

Contractor shall ensure that the proposed project team includes personnel who can provide all categories of services listed in the Scope of Services.

Contractor shall be responsible for providing coordination on project and supporting SRTA’s work including, but not limited to:

- graphic design
- graphic, print and other project specifications;
- strategic planning;
- creation of project estimates;
- follow through on billing issues; and
- preparation of production-ready output

Contractor shall regularly engage with SRTA’s marketing and/or communications team. Depending on the nature of the task order, this may involve daily, weekly and/or month contact. The type of contact, which shall be determined by the designated SRTA Project Manager, may include, but is not limited to:

- phone calls, email correspondence, and participation in client meetings;
- development and production of a diversity of marketing, communications, and video production deliverables;
- Regular oral and written progress reports and written quarterly evaluations; and
- presentation(s) to the State Road and Tollway Authority or other groups, as appropriate.

Contractor shall ensure that its proposed team has a working knowledge of and access to the following design programs and computer software (in a Windows-based PC operating system) currently used to create and edit SRTA marketing and communications materials: In Design, Illustrator, Photoshop Elements, SharePoint, and Microsoft Office. If, during the Contact term, Contractor elects to discontinue or change a software or design program that supports marketing and/or communications materials in use by SRTA, Contractor will convert SRTA’s designs and materials to the new program or format at Contractor’s sole expense. Contractor shall work in conjunction with identified SRTA personnel to ensure that the services and any deliverables are provided in accordance with industry standards and best practices.

#### 5.4 SRTA’s Responsibilities

SRTA will:

- Oversee, review, and approve all campaign, program, and project work.
- Outline project needs, timeline, general budget and SRTA staff role(s) for project work.
- Provide source materials for project work and be responsive to project development, creative concepts, defined deadlines, proof checks, billing issues, and other standard Contractor needs.
- Coordinate advertising buys and placement directly with media, unless otherwise indicated.
- Coordinate press release and related materials directly with media, unless otherwise indicated.

## 5.5 Task Orders

SRTA anticipates that it will issue a Task Order (Order), or a similar order document, for specific work activities under the Awarded Contract(s). Each Order must be mutually agreed upon, in writing, between SRTA and the Awarded Contractor(s). Each Task Order will identify the scope of work and cost for a specific activity. Orders will be placed on an as-needed basis.

Tasks may include, but are not limited to:

- Development and execution of overall marketing/communications plan, “the strategy.”
- Design and production of media ads (including web and social media) and recommendations/guidance on resultant media buys. (SRTA reserves the right to handle ad placement with internal staff and budget.)
- Design and production of any and all collateral materials including online/social media, mailers, handouts, post cards, brochures, etc.
- Planning and execution of on-site and special-event marketing, creating opportunities to engage customers at related facilities such as service plazas, colleges, employment centers, and community events.
- Project management for communications, media relations, public relations including message development, media presentation, proactive media outreach, placement of by-lined articles, editorial writing, media tracking and reporting, crisis communication, issues management and related tasks.
- Provide general advertising, communications and public relations counsel.
- Project planning to achieve communications goals.
- Explore and advise on potential partnerships with other public and private entities for joint marketing/co- branding opportunities.
- Regular oral and written progress reports and written quarterly evaluations
- Other activities as may be mutually agreed to in writing by SRTA and Proposer.

## 6 Attachments

The following are provided as separate attachments:

- (A) Attachment 1 - Question and Answer Template
- (B) Attachment 2 - Offer Documents
- (C) Attachment 3 - SRTA Service Provider Agreement (Contract Sample)

(D) Attachment 4 – Rate Card Template

(E) Attachment 5 – Informational Links