

**Request for Proposals (RFP)
For
Graphic Design Services
For
The Retirement Systems of Alabama
For
Five-Year Contract Period**

RFP No: 14-019



The Retirement Systems of Alabama
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**The Retirement Systems of Alabama
Request For Proposal (RFP) – Graphic Design Services**

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SECTION I

GENERAL INFORMATION

A. PURPOSE

The purpose of this Request for Proposals (RFP) is to establish minimum requirements, solicit vendor proposals, and gain sufficient information for the Retirement Systems of Alabama (RSA) to successfully evaluate the Graphic Design Services offered by the Vendors.

This RFP details the minimum requirements mandated by the RSA for Graphic Design Services. Periodically, the RSA requires graphic design assistance to complete projects such as the RSA Annual Report, logos, banners, posters, covers, and special publications. **The contract is for a period of five (5) years, beginning December 1, 2014.**

B. BACKGROUND

The RSA serves in excess of 335,000 members maintaining investment strategies related to the administration of Defined Benefit Pension Plans as well as the direct provision of services to its membership. The RSA is comprised of the following entities:

- Teachers' Retirement System (TRS)
- Employees' Retirement System (ERS)
- Judicial Retirement Fund (JRF)
- Public Employees' Individual Retirement Account Fund (PEIRAF: Deductible Employee Contributions)
- Public Employees' Individual Retirement Account Fund (RSA-1: Deferred Compensation Plan)
- Public Education Employees' Health Insurance Plan (PEEHIP)
- RSA Real Estate

C. STATEMENT OF NEED

While most of the Graphic Design Services are done by the RSA Communications staff, on occasion assistance is required with the more complicated facets of graphic design.

D. REQUIREMENTS FOR RESPONDING TO RFP

1. WHERE TO SEND RESPONSES

Vendors must submit a **Letter of Intent to Propose** no later than **9/30/2014**. The letter can be sent to the address below or by email to mike.pegues@rsa-al.gov. Include your email address in your letter.

SECTION I

Proposals are to be routed to the RSA in one of two ways:

Via US Postal Service	Via Courier (UPS or FedEx) or Hand Delivery
Retirement Systems of Alabama PO Box 302150 Montgomery, Alabama 36130-2150 Attn: Mr. Michael Pegues Director of Communications	Retirement Systems of Alabama 201 South Union Street, Suite 574 Montgomery, Alabama 36104-0001 Attn: Mr. Michael Pegues Director of Communications

Respondents must submit **two (2) copies** their proposal in a sealed wrapper with the following information plainly labeled on the front:

Retirement Systems of Alabama
Graphic Design Services Proposal
RFP NO: 14-019

2. DEADLINE FOR RECEIPT OF PROPOSALS:

DATE: 10/14/2014
TIME: 5:00 PM (CST)

Please note the Deadline for Receipt of Proposals. All proposals must be received by the RSA on or before 10/14/2014 at 5:00 p.m. by U.S. Postal service, Courier, or Hand Delivery. Vendors submitting their information beyond this deadline **WILL NOT** be given consideration. Proposals will be opened on **10/15/2014** for review and evaluation.

3. POINT OF CONTACT

Mr. Michael Pegues
Director of Communications
Mike.Pegues@rsa-al.gov
334.517.7000 or 877.517.0020

E. RIGHT OF REJECTION

The RSA reserves the right, at its sole discretion, to reject any and all proposals or to cancel this RFP in its entirety. Proposals received which do not meet outlined requirements of this RFP may be considered as "non-responsive". In this circumstance, the RSA may reject the proposal as it does not adhere to the terms, conditions, and performance requirements. Respondents must comply with the terms of this RFP as well as applicable State mandated laws and regulations.

SECTION I

Respondents may not restrict the rights of the Retirement Systems of Alabama (RSA) or otherwise qualify their proposal. If they attempt to do so, RSA may determine the proposal to be a “non-responsive” counteroffer, and the proposal may be rejected.

The RSA reserves the right, at its sole discretion, to waive variances in Respondent’s Qualifications provided such action is denoted to be in the best interest of the RSA. Should RSA waive minor variances in proposals, such waiver does not modify the RFP requirements or excuse the Respondent from full compliance to said RFP. Notwithstanding any minor variance, the RSA may hold any Respondent to strict adherence and compliance with the RFP.

F. DISCLOSURE OF PROPOSAL CONTENTS

All proposals and other materials submitted in response to this RFP procurement process become the property of RSA. Selection or rejection of a proposal does not affect this right. All proposal information, including detailed price/cost information, shall be held in confidence during the evaluation process. Upon the completion of the evaluation of proposals, indicated by public release of an Evaluation Notice, the proposals and associated materials shall be open for review by the public (public domain). By submitting a proposal, the Respondent acknowledges and accepts that the **full** contents of the proposal and associated materials shall become open to public inspection.

G. SEVERABILITY

If any provision of this RFP is declared by a court to be illegal or in conflict with any law, the validity of the remaining terms and provision shall not be affected. Further, the rights and obligations of the RSA and Respondents shall be construed and enforced as if the RFP did not contain the particular provision held to be invalid.

H. RFP AMENDMENT AND CANCELLATION

The RSA reserves the unilateral right to amend this RFP in writing at any time. The RSA also reserves the right to cancel or reissue the RFP at its sole discretion. If an amendment is issued it shall be provided online and its presence noted via an e-mail to all Vendors submitting a **Letter of Intent to Propose**. Vendors should then respond to the issued RFP along with associated exhibits, attachments, and amendments.

I. CONFLICT OF INTEREST AND PROPOSAL RESTRICTIONS

By submitting a proposal, the Respondent certifies that no amount shall be paid directly or indirectly to an employee or official of the State of Alabama as wages, compensation, or gifts in exchange for acting as an officer, agent, employee, subcontractor, or consultant to the Respondent in connection with the procurement under this RFP. Act 2001-955 requires an Alabama Disclosure Statement to be completed and filed with all proposals, bids, contracts, or grant proposals to the State of Alabama in excess of \$5,000.

Notwithstanding this restriction, nothing in this RFP shall be construed to prohibit a state agency or other governmental entity from making a proposal, being considered for award, or being awarded a contract under this RFP.

SECTION I

State agencies shall not contract with an individual who is, or within the past two years has been, an employee of the State of Alabama. An individual shall be deemed a State Employee until such time as all salary, termination pay, and compensations representing annual and/or compensatory leave have been paid by the State. A contract with a company in which a controlling interest is held by a State Employee shall be considered to be a contract with said individual and shall be prohibited.

J. DELIVERY SCHEDULE

Graphic Design Services must be ready to begin on **December 1, 2014**.

K. PAYMENT SCHEDULE

Payments will be made at the end of each month work was performed at the rates proposed by the awarded Vendor. Additionally, the Vendor will be required to provide supporting documentation detailing the volume of service and applicable rates charged in accordance with Vendor's proposal. The final bill for each month's service will be paid within 30 days of receipt of the invoice and supporting documentation.

L. SELECTION OF VENDOR

The RSA expects to execute a contract for services with the selected Vendor. All Respondents will be notified in writing within a reasonable length of time following the selection. Prior to the selection of a Vendor, two or more Vendors may be requested to make oral presentations to the evaluation committee. The proposal shall become the property of the RSA. The selected Vendor(s) must execute an agreement specifying that all information received from the RSA shall remain confidential and shall not be disclosed to any third party without written consent of the RSA.

M. NEWS RELEASES

News releases pertaining to this RFP or the services provided pursuant to an award resulting from this RFP will be made only with prior written approval of the CEO of the RSA or his representative.

N. MINIMUM QUALIFICATIONS

Proposals will be accepted from firms where the firm meets the following minimum experience qualifications:

- The Vendor has performed illustration, computer graphics, and design for a minimum of twenty (20) years.
- The Vendor's representative primarily responsible for providing RSA graphic services must have a degree in computer science, art, or related field and have attended professional courses in Adobe Creative Suite, Online Adobe and Apple Pro or the equivalent.

SECTION I

- The Vendor must possess the qualifications for design, layout, editing, copy writing, photo manipulation, illustration, information graphic production, conceptualization, and production realization.
- The Vendor must possess the hardware and software to complete the qualifications listed above.

SECTION II

REQUIREMENTS – GRAPHIC DESIGN SERVICES

The RSA is responsible for creating its own publications that require Graphic Design Services. While most of the Graphic Design Services are done by the RSA Communications staff, there are projects requiring additional graphic design services that include, but not limited to, logo design, banners, covers, annual reports, posters, and special publications.

1. The Vendor must be able to conceptualize what the project is about and carry that vision forward to its completion. This will include meeting with RSA staff and being involved in discussions about the **concept**. The Vendor must be able to determine the visual content and make a rough conceptualization and catalog the initial information.
2. The Vendor must be able to flesh out by **writing** what the conceptualization is through research and initial copy structure.
3. The Vendor must provide a rough **design** with a formulation of shot list and determine the graphic needs. The Vendor must produce comp series for client review.
4. The Vendor must provide **graphics production** to include design and realization of graphics, numerations, charts, illustrations, art elements, design elements, and graphics for initial cover layout.
5. The Vendor must provide and assist with **photography production** to include set up of photo shoots, coordination with photographers, scheduling with client and subjects, stock search, archive search, cull process, purchasing and acquisition, color correction, retouching and sizing for final layout.
6. The Vendor must provide **layout** services to include determination of page counts and final content, section design and layout, headers, footers and captions design and layout final copy writing, fact checking, and grammatical referencing.
7. The Vendor must provide **proofing and editing** of final text, photos, design and layout. The Vendor must also provide digital correspondence of complete proofs between the RSA and all associated entities such as printing firm.
8. The Vendor must provide **prepress** services for Annual Report to include digital print ready documents and all associated files, reference knowledge and experience with offset and web press, and image setting technologies.
9. The Vendor must provide **press proofing** to include reviewing complete digital printer proofs in studio, reviewing hard color proofs from the printer alongside the client, reviewing press proofs at the printer site during press run, reference knowledge and experience with offset and web press in discussions with press operators.
10. The Vendor must provide **archive** services to include catalog and backup all working and final design files, photography, illustration, layout, text, reference documents from the RSA, and final prepress document.

SECTION II

11. The Vendor must provide **online publishing** by producing digital document through Adobe Acrobat for online distribution.
12. The Vendor must possess the following or its equivalent **hardware**:
 - MacBook Pro 2.3GHz quadcore / 8GB RAM / 750GB HD
 - Live digital backup [2TB (2,000GB)] and passive archive [DVD burn and store]
 - HD Apple Cinema display and HD Wacom Cintiq interactive pen display
 - HP printer / scanner
 - Nikon P90
 - High-speed web and online resourcing
 - Lossless power generator
13. The Vendor must possess the following **software**:
 - Adobe Creative Suite Premium CS5 [InDesign / Illustrator / Photoshop / Acrobat Professional]
 - iWork [word processing / accounting / presentations]

SECTION III

INFORMATION REQUIRED FROM RESPONDENTS

A. QUALIFICATIONS OF THE FIRM

1. BUSINESS ORGANIZATION

State the full name and address of the organization, and if applicable, the branch office or other subordinate element that will perform or assist in performing the services hereunder. Indicate Business Structure (whether the organization operates as an individual, partnership, or corporation); and if noted to be a corporation, include the state in which the organization is incorporated. State whether you are licensed/authorized to operate in the State of Alabama. Identify officers, partners, or managers of the organization responding to this RFP and who will be primarily responsible for providing services to the RSA.

2. PRIOR EXPERIENCE

Please provide contact information (Name, Title, Address, Phone Number) for three (3) individuals at firms you have previously performed graphic design services that may be contacted for reference verification on the organization's behalf. Include a list or resume of your qualifications for performing Graphic Design Services.

3. EXAMPLES OF GRAPHIC DESIGN SERVICES

Provide a minimum of five (5) examples of Graphic Design Services you have performed for other clients.

4. AUTHORIZED OFFICIALS

Include the Names and Telephone Numbers of personnel within the organization who have the authority to execute the proposed contracts with the RSA.

5. ADDITIONAL INFORMATION AND COMMENTS

Include any additional information for consideration that may be pertinent but may not have been specifically requested elsewhere in this RFP.

B. SERVICE IMPLEMENTATION

1. COST AND PRICE ANALYSIS

The information in this section is required to substantiate the reasonableness of the quoted proposal price and should include itemization of the following:

- The hourly rate, fee basis and formula for calculating costs of Graphic Design Services.
- Other miscellaneous charges (e.g.: any setup fees).

SECTION III

2. ECONOMY OF PREPARATION

Proposals should be prepared in a simple and economical manner, detailing concisely the Respondent's description of services related to the requirements outlined in this RFP. Emphasis should be on clarity of content, and should ensure no misinterpretation of the organization's capabilities will result based upon responses provided. The RSA will not be responsible for any costs incurred by any Respondent in the preparation of a proposal.

C. ADDITIONAL REQUIRED DOCUMENTATION

The five documents listed below and attached must be completed and accompany all other RFP documents submitted to the RSA. These forms are required by state law.

1. STATE OF ALABAMA DISCLOSURE STATEMENT

This disclosure statement is required by Alabama Cod Section 41-16-82 and must be completed and submitted with the RFP.

2. STATE OF ALABAMA CONTRACT TERMS

Vendors must be willing to agree to the contract terms required of all State of Alabama contracts, as set forth in the attached contract shell document.

3. IRS FORM W-9

Vendors must provide the RSA with a completed Internal Revenue Service Form W-9, Request for Taxpayer Identification Number and Certification.

4. IMMIGRATION COMPLIANCE DOCUMENTATION

Vendors must complete and submit a Certificate of Compliance with the Beason-Hammon Alabama Taxpayer and Citizen Protection act (Act 2011-535, as amended by Act 2012-491). Vendors that are Alabama entities and/or employ persons within the state of Alabama will also be required to provide a copy of the E-Verify MOU.

5. RSA CONFIDENTIALITY AND NON-DISCLOSURE AGREEMENT

Vendors must complete the RSA disclosure form to protect the confidentiality of information received from the RSA.

SECTION IV

CRITERIA FOR EVALUATION

A. EVALUATION BASIS

Request For Proposals (RFP) will be reviewed by an evaluation committee. Selection will be based on all factors listed below and others implicit within the RFP and will represent the best performance, technical approach, and reasonable costs for the RSA. Oral presentations and interviews may be required as part of the evaluation criteria.

B. FACTORS

The following factors will be the minimum criteria in making the selection (note that order does not indicate priority):

1. PRICE

This criterion shall be judged by its reasonableness in relation to the merits of the proposal.

2. QUALIFICATION OF THE FIRM

This includes the ability of the Respondent to meet the terms of the RFP and the relevancy of recent similar services provided to other public pension funds.

3. PROFESSIONAL PERSONNEL

The competence and level of professional personnel who perform the Graphic Design Services will be considered. Education, certifications, and relevant graphic design experience will measure qualifications of professional personnel.