



**ADDENDUM NUMBER 1  
TO  
REQUEST FOR PROPOSALS # 08-26**

Request for Proposals (RFP) Title: **Strategic Communications and Branding for Sustainable Economy Initiatives**

Date this Addendum Issued: **April 23, 2009**

Solicitation Coordinator: Daniel Spero, CPPB  
Senior Procurement Specialist  
Professional Services  
Portland Development Commission  
(503) 823-3291 (office)  
(503) 865-3738 (fax to email)  
[SperoD@pdc.us](mailto:SperoD@pdc.us) (email)

**I. PURPOSE OF THIS ADDENDUM**

---

The purpose of this Addendum is to answer questions the Portland Development Commission ("PDC") received regarding the above-referenced Request for Proposals ("RFP").

**II. GENERAL INSTRUCTIONS**

---

- This Addendum constitutes an integral part of the RFP and shall be read in conjunction with the RFP.
- Where inconsistent with the original RFP, or any previous Addendum to the RFP, this Addendum shall govern.
- It is the responsibility of all Proposers to conform to this Addendum.
- Unless specifically changed herein, all other requirements, terms and conditions of the RFP remain unchanged and can only be modified if in writing.

**III. About the Project Timeline**

---

PDC received several questions regarding project timeline alterations and extensions. The objective and intent of the RFP timeline is to produce quality work products in a short period of time. Proposers are encouraged to propose a work plan and schedule that meets this objective. Proposers may alter the sequence of tasks, including associated meetings, to align with best practices in order to meet this objective.

If Proposers believe a timeline extension is necessary to strike a balance between quality work products and the immediate communications and branding needs of the Initiatives, then Proposers should propose an appropriate timeline that adheres to the project budget. Proposed timeline alterations and sequencing should be addressed in the Proposer's "Project Approach and Methods"

(Section V (D) of the RFP). Such approaches that clearly demonstrate the reasoning behind timeline extensions will be judged by PDC accordingly on their merits.

#### **IV. Questions and Answers about the RFP and Project**

---

**Question 1.** Can you clarify the intent of the weekly meetings with PDC staff and stakeholders? How many staff/stakeholders would be involved on a weekly basis? Can this be negotiated?

*PDC Response:* The work resulting from this RFP will happen on an accelerated schedule. The weekly meetings with PDC staff and stakeholders are anticipated as needed to cover project updates and decision-making points throughout the duration of the contract.

For each task listed in the Scope of Work, the Selected Consultant can expect the PDC Project Manager and one of two decision-making bodies to be present. The decision-making body for Sections IV (A) (1) – (4) represents stakeholder groups for the **Organization**, the **Center** and the **Network** and includes approximately five (5) members. The decision-making body for Sections IV (A) (5) – (6) represents stakeholder groups for the **Center**, and includes approximately four (4) members. Due to the collaborative nature of the three initiatives, these stakeholder groups are at a minimum size to facilitate quick decision-making.

**Question 2.** Regarding weekly meeting, if the project schedule extends beyond the timeframe at no fault of the Selected Consultant, will additional funds be allocated for Account/Project Management time to attend these meetings?

*PDC Response:* Price proposals must include all meetings necessary to complete the Scope of Work as set forth in the RFP. If PDC requests additional meetings, meetings outside the scope listed in the RFP or if the schedule is extended through no fault of the Selected Consultant, PDC will agree to renegotiate applicable sections of the contract to compensate the Selected Consultant for their time accordingly.

**Question 3.** Is there a particular need that is driving the deadline?

*PDC Response:* The **Organization**, the **Center** and the **Network** are in various stages of development and each has a public presence. As these initiatives progress, it is vital that each has a permanent name, brand and messaging. Additionally, when the feasibility study for the **Center** concludes in June, a communications plan, a website and further collateral will be essential to project fundraising and development.

**Question 4.** If we feel the scope of the deliverables does not mesh with budget requirements, can we propose an alternative deliverable list?

*PDC Response:* Yes, provided the alternative list of deliverables does not exceed the budget requirements described in Section III (C) of the RFP, “A Note about the Budget.”

**Question 5.** The RFP states that submitted proposals must not exceed 14 pages (page 11). Does this mean 14 pages single-sided or 14 double-sided pages?

*PDC Response:* **See Section V of this Addendum**, which changes the RFP. Now, proposals must not exceed 12 printed pages (e.g. 6 double-sided pages; 12 single-sided), **not including personnel résumés or Work Product Samples**.

**Question 6.** Which firms did PDC solicit with the RFP?

*PDC Response:* PDC sent the RFP to the following firms:

- Pyramid Communications
- Carlson Communications
- FMYI
- Pinch
- Ecos
- Ziba
- Grapheon
- Green Marketing NW
- Met Group
- Ditroen
- Coates Kokes
- Groove 11
- Maxwell PR Studio
- Felt Hat
- Chisel Industries
- Formos
- Net Manifold
- Sockeye Creative

The RFP is also hosted on the PDC website and available for anyone to download.

**Question 7.** Regarding insurance requirements for automobile liability, will a personal auto insurance policy suffice for sole proprietorships?

*PDC Response:* Provided personal automobile policies are 1) provided for all of the Selected Consultant’s personnel or individuals performing work under the contract and 2) the limits on those policies are not less than the limits listed in the RFP, then yes, personal auto policies will suffice for that insurance requirement.

**Question 8.** Regarding the “Ownership of Work Products” provision on page 21 of the RFP, will the Selected Consultant waive the right to display any work created for PDC on our website(s) or for marketing purposes to solicit new business?

*PDC Response:* PDC will grant to the Selected Consultant/Contractor a non-exclusive, royalty-free license to use the Work Products for marketing purposes only.

**Question 9.** The RFP lists the primary stakeholders as PDC, the Bureau of Planning and Sustainability (“BPS”) and the Portland + Oregon Sustainability Institute (the “**Organization**”). The RFP also states that the Selected Consultant will help define the target audiences. Does any research currently exist that helps to define key business industries to target? If so, is this research available for distribution? What are the key audiences for each of the individual entities?

*PDC Response:* PDC has defined the Clean Tech and Sustainable Industries (“CTSI”) for regional economic development. PDC’s “CTSI Cluster Profile” will be posted to the PDC website here:

[http://www.pdc.us/login/download\\_nologin.asp?i=937](http://www.pdc.us/login/download_nologin.asp?i=937)

PDC’s work defines a base of industries to include in these three initiatives, but these initiatives may also include industries not represented by PDC’s cluster profile. Other requested information will be provided to or discovered by the Selected Consultant.

**Question 10.** Is it intended for this coalition group to be tied in any way with any of the “Brand Oregon” initiatives or other initiatives related to Oregon Economic and Community Development Department (“OECCD”) or the Governor’s key initiatives?

*PDC Response:* The **Organization** is not formally tied to the Oregon Brand initiative but has a close working relationship with the Governor’s office and OECCD regarding policy and economic development activities.

**Question 11.** For the **Center** collateral, what are the quantities desired to aid in cost estimates? And, are all printing costs associated with collateral included in the total budget allocated for this work or is printing a separate budget? Is the website development cost to come from a separate budget?

*PDC Response:* While PDC expects Selected Firm to provide a limited number of as-needed printed samples to client stakeholders for discussion and review, mass-printing costs of the selected collateral should be excluded from the bid price. Except for the limited number of samples copies, printing costs for collateral will come from a separate budget and should **not** be included in the Proposer’s “Price Proposal.” The price for **Center** collateral should include a good faith estimate for design, review and development activities for the collateral, though there may be some negotiation with the Selected Consultant once the target audiences and strategy have been agreed upon.

In short, Proposers should note that the \$80,000 budget referenced in Section III (C) of the RFP must include website production costs and prototype collateral production costs. The associated printing costs of collateral will come from a separate budget.

**Question 12.** Regarding the website for the **Center**, what internal capabilities does the **Center** have to maintain and grow the developed site?

*PDC Response:* The **Center** will have dedicated staffing that has familiarity with basic content management software and website updating. The Selected Consultant is expected to provide basic training on website updating to a handful of client-group staff and must observe the design criteria for the **Center** website which requires that it be “easy to edit” (Section IV (A) (6) (a) (iv) of the RFP).

**Question 13.** Is there a current social media strategy for the **Center**? Or for PDC?

*PDC Response:* The **Center** currently has a blog, which hosts an RSS Feed and comments: <http://oregonsustainabilitycenter.wordpress.com>  
We would like to incorporate further social media networking components into the site but those ideas need to be further explored.

**Question 14.** How will the **Center** manage the social media tools used?

*PDC Response:* Internal **Center** staff will manage the social media tools.

**Question 15.** Does the website developed for the **Center** need to fit within existing site architecture (e.g. PDC’s architecture) or is this a standalone site?

*PDC Response:* It must stand alone from PDC’s website.

**Question 16.** Regarding site content, will all the content be provided by the **Center**?

*PDC Response:* Except for content generated by the Selected Consultant during completion of the Scope of Work of the contract, all other content will be provided by **Center** personnel.

**Question 17.** For the Price Proposal it lists “costs of various type of collateral for the Center” and “costing options for the Center website.” How will you evaluate these costs? Will everyone be submitting costs on the same quantities for collateral and the same specs? What are the quantities? Please define “costing options for the Center website.”

*PDC Response:* Costs will be evaluated to identify best value to PDC and affiliated stakeholders. Quantities of collateral are not required (see Question 11 above). By “costing options for the **Center** website,” PDC is generally referring to the range of pricing options that Proposer may propose for the website, including, but not limited, costs related to licensing fees for a CMS (if applicable), hosting fees, technical support or other features of the website that may have an associated cost. Essentially, PDC seeks to understand the full cost of ownership for the website.

**Question 18.** Regarding the evaluation process, will there be presentations scheduled with the finalist proposers? If yes, when will these take place?

*PDC Response:* Interviews will likely be conducted to make a finalist selection, depending on the nature and quality of proposals PDC receives in response to the RFP, though PDC may elect not to conduct interviews (see Section VI (O) of the RFP, “Method of Evaluation”). If PDC elects to conduct interviews with the finalist Proposers, PDC will make every reasonable effort to provide those finalists with as much advance notice as is practical. Tentatively, PDC estimates that if interviews are conducted, they will be held on the morning of Monday, May 11.

**Question 19.** Which programs/initiatives of the **PDX Lounge** have been the most utilized, popular and successful?

*PDC Response:* PDX Lounge does not have specific programs or initiatives associated with it. It has been a traveling exhibit that attends the Greenbuild and West Coast Green conferences. The most successful results of the traveling exhibit were:

- Exposure for small to mid-size companies that would otherwise have had a hard time paying for marketing efforts
- Networking among partnering organizations and to the targeted audience
- Brand identity for Oregon's unique and trustworthy sustainability brand
- Job growth

**Question 20.** Are there any specific collateral marketing components that must be included in the strategy / campaign?

*PDC Response:* PDC expects the Selected Consultant to recommend the specific pieces of collateral that will best connect the **Center** to its target audiences. Stakeholders strongly believe that a pitch-book to use during the fundraising process will be an asset. This said, Proposers are welcome to recommend what they envision to be the best pieces of collateral for the **Center**.

**Question 21.** Has PDC conducted any market research in the past fiscal year that could be utilized by selected vendor? If so, what kind of research was conducted (online, person-to-person, phone, qualitative, quantitative, etc.)?

*PDC Response:* PDC is in the process of conducting a customer service satisfaction survey on individuals PDC has rendered direct services to in the past few years. This survey involves telephone surveying and an online survey. Interested parties can review the RFP for this project on the PDC website here: [http://www.pdc.us/login/download\\_nologin.asp?i=911](http://www.pdc.us/login/download_nologin.asp?i=911) Results are not currently available for this survey, though some portions may be available for review by the Selected Consultant once under contract.

Note, however, that the marketing and branding efforts contemplated in the RFP are for those stake-holders listed in the RFP (the **Organization**, the **Center** and the **Network**) which may be related to PDC but are not PDC. That is, applicability and usefulness of the PDC market research data may or may not have a significant bearing for the project described in this RFP (#08-26).

**Question 22.** If we are in the process of applying for woman-owned business status, does that count towards the possible 10 extra points?

*PDC Response:* The “Promotion of M/W/ESB Firm in Subcontracting Opportunities” evaluation criterion, described in Section V (F) of the RFP, will be evaluated in accordance with PDC’s prescribed evaluation methods. Note there are four principal items in Section V (F) of the RFP: 1) Proposer’s description of past experience promoting M/W/ESB firms as partners, subcontractors, etc.; 2) Innovative or successful methods your firm has taken to provide business opportunities to M/W/ESB firms; 3) Proposer’s description of proposed and future efforts to promote M/W/ESB firms; 4) Plan to include any M/W/ESB firms as subcontractors on a contract awarded from this RFP (if applicable). The stronger the response on the Proposer’s part for these items, collectively, the more points will be awarded to that Proposer for this criterion.

Note that being a certified firm is **not** a part of the evaluation criterion; it speaks only of a plan to have used or to promote M/W/ESB firms as sub-contractors/sub-consultants on past, present and future projects.

**Question 23.** Can you please define the primary target audiences for the **Organization’s** near- and long-term communications needs? How are these audiences related/connected? What motivates them into action/participation?

*PDC Response:* The intent of the communications strategy is to refine key audiences. Presently, the **Organization** is in its formative stages of development and therefore primary audiences include key stakeholders in the areas of funding, program development and board recruitment. These key audiences include Mayor Sam Adams’ office, PDC, Portland Bureau of Planning and Sustainability (“BPS”), Metro, Portland State University (“PSU”) and key Portland area sustainability non-governmental organizations (“NGO”) and business leaders.

The initiatives in which the **Organization** is currently involved have additional audiences that include the Oregon University System (with an emphasis on PSU), PDC, BPS, the Oregon Living Building Initiative (a consortium of 15 organizations led by Oregon Environmental Council and Earth Advantage), Greenlight Greater Portland, Metro, sustainability business and NGO

leadership (e.g. Green Building Services, Gerding Edlen, SERA Architects, Oregon Solutions, Ecotrust), Oregon Business Council and Oregon Solutions. Motivations vary from organization to organization and depend on their role in **Organization**-related initiatives.

**Question 24.** What do you believe are the primary communications challenges you are currently facing to be? How do you think that these will change when the **Center** comes online?

*PDC Response:* Four immediate challenges facing the **Center's** communications are: 1) creating a single voice and unified vision of the project that is 'owned' by a wide range of stakeholders; 2) fundraising; 3) engaging the public in dialogue about what the building can be, both physically and programmatically; and 4) gathering information about leading green building practices worldwide that can be used in the design of the building.

When it comes online, the **Center** will transfer from a project to a process. Now, as then, the building's central focus is to be an innovator, working with and evolving beyond current innovations in sustainability. Ideally, the **Center** will capitalize on communications tools to make this happen.

**Question 25.** Although the relational nature of the brand architecture between the **Organization** and the **Center** appears to be clear, how strong will the connection to the **PDX Lounge** be?

*PDC Response:* **PDX Lounge** is intended to be the public space in the **Center**. The lounge will exhibit the story and innovations of the region's sustainable industries in a gallery or exhibit-like space in the **Center's** public areas, connecting directly to the **Center** itself. Additionally, the businesses represented by the **Network** and **PDX Lounge** are one of several groups that the **Organization** will convene.

**Question 26.** What research assets do you currently have in place?

*PDC Response:* Proposers are directed to the "Background Documents" listed at this location: [http://www.pdc.us/login/download\\_nologin.asp?i=937](http://www.pdc.us/login/download_nologin.asp?i=937)

**Question 27.** Regarding the legal availability of the Initiative names referenced in Section IV (A) (2) (a) of the RFP, we can do an initial legal search on names to eliminate any obviously problematic names. However, it is costly to do an official legal clearance of the names. Can we identify if there are problematic names and have PDC provide the final legal clearance for the names?

*PDC Response:* Yes. The intent of this section is for the Selected Consultant to conduct thorough due diligence and, to the extent possible, determine if the new Initiative names will infringe upon existing organizations' intellectual property; not to provide legal certification of name availability.

**Question 28.** Regarding Section IV (A) (3) (a) & (b) on page 6 of the RFP, it seems like there might be some overlap on the messaging for the **Organization**. Can we collaborate and gain efficiency with the **Organization's** current strategic visioning consultant? Can we begin working with the consultants for the **Organization** and the Center within the first week of the contract period?

*PDC Response:* Yes, the Selected Consultant is encouraged to build upon work already completed by others. The Selected Consultant can work with the **Organization's** current strategic visioning consultant as schedule and budget permits.

## V. Changes to the RFP

---

The “Page Limit” Section on page 11 of the RFP is hereby deleted and replaced with the following (changes from the original in bold underline):

**“Page Limit.** Excluding the title page, cover letter, **personnel résumés and work product samples**, proposals submitted in response to this RFP must not exceed **twelve (12) pages**. If a proposal exceeds this page limit, PDC may decline to review information beyond the 12<sup>th</sup> page.”

**Note: This Addendum does not change the Proposal due date.**  
**END OF THIS ADDENDUM**