



REQUEST FOR PROPOSALS FOR COMMUNICATIONS MARKET RESEARCH SERVICES

I. Introduction

WestEd is soliciting proposals from market research firms to provide market research services regarding the agency's various communications vehicles.

This request for proposals contains background information on WestEd and specific information that must be included in the proposals submitted. Electronic and paper versions of the proposals must be received no later than 5:00 p.m. Pacific time on Monday, August 22, 2011 ("due date"). Physical copies must be delivered directly to our office at the following address:

WestEd
730 Harrison Street, Suite 500
San Francisco, CA 94107
Attn: Matthew Spaur

II. Background

WestEd is a not-for-profit research, development, and service agency that works with education and other communities to promote excellence, achieve equity, and improve learning for children, youth, and adults. WestEd has over 600 employees, located in 17 offices across the United States, and for the last several years has had annual revenues in excess of \$100 million.

WestEd is a Joint Powers Agency ("JPA") formed under the California Joint Exercise of Powers Act, California Government Code section 6500 *et seq.* and governed by public entities in Arizona, California, Nevada, and Utah. WestEd's Board of Directors is comprised of members representing agencies from these states, as well as other national education and business leaders. WestEd is tax exempt under Section 115(1) of the Internal Revenue Code.

WestEd complies with the required federal regulations on procurement, as well as applicable State procurement law and procedures.

III. Notice to Offeror(s)

All materials provided to WestEd become the property of WestEd and may be returned only at its sole discretion. WestEd is not obligated to accept any proposal or to negotiate with any entity. All transactions are subject to the final approval of WestEd, which reserves the right to reject any and all proposals without liability. All costs directly or indirectly related to a response to this RFP will be borne by the proposer.

WestEd may at its sole discretion select the response that best fits its needs, may choose to cancel the RFP, or to not select any offeror. A selection committee will evaluate the responses

based on established criteria including compliance with the direction herein, experience and qualifications, cost, financial position of the company, and other factors. If selected, the successful firm will enter into a written agreement with WestEd that will include service agreements and compensation agreements.

IV. Rejection of Proposals

WestEd reserves the right in its sole discretion to reject any or all proposals, in whole or in part, without incurring any cost or liability whatsoever. All proposals will be reviewed for completeness of the submission requirements. The proposal may be rejected if it fails to meet a material requirement of the RFP, or if it is incomplete or contains irregularities. A deviation is material to the extent that a proposal is not in substantial accord with RFP requirements.

Immaterial deviations may cause a bid to be rejected. WestEd may or may not waive an immaterial deviation or defect in a proposal. WestEd’s waiver of an immaterial deviation or defect will in no way modify the RFP or excuse a bidder from full compliance with the RFP requirements.

Any proposal may be rejected where it is determined to be not really competitive, or where the cost is not reasonable.

Proposals that contain false or misleading statements may be rejected if in WestEd’s opinion the information was intended to mislead WestEd regarding a requirement of the RFP.

V. Compliance with Laws

Any offeror must affirmatively agree and certify that it will comply with all applicable federal, state, and local laws and regulations, including but not limited to the provisions of the Fair Employment and Housing Act (Govt. Code, § 12900 et seq.) and any applicable regulations promulgated there under (Cal. Code of Regs., tit. 2, § 72850.0 et seq.). Any offeror must affirmatively agree to include the non-discrimination and compliance provisions of this clause in any and all subcontracts or consulting agreements to perform work under the agreement.

VI. RFP Schedule

Date	Time	Event
Wednesday, July 27 th 2011	12:00 p.m.	RFP issued
Friday, August 12 th , 2011	5:00 p.m.	Deadline for submitting questions to mspaur@WestEd.org.
Wednesday, August 17 th , 2011	5:00 p.m.	Distribution of WestEd responses to RFP questions, and any issuance of addenda or other modifications.

Monday, August 22 nd , 2011	5:00 p.m.	Responses due to Matt Spaur - send electronically to mspaur@WestEd.org and send five (5) copies with a postmark no later than the due date to Matt Spaur at 730 Harrison Street, Suite 500, San Francisco, CA 94107.
Tuesday, August 23 rd , 2011	10 a.m.	Responses to RFPs opened in the Arizona Room of WestEd's office at 730 Harrison Street, San Francisco, CA, 94107.
Friday, August 26 th , 2011	3 p.m.	Finalist(s) announced. Offeror(s) not advanced to final round are notified.
Monday, August 29 nd , 2011 to Friday, September 2 nd , 2011		Interview period
Tuesday, September 6 th , 2011	10 a.m.	Apparent awardee(s) announced. Finalist(s) not chosen are notified.
Wednesday, September 14, 2011	9:00 a.m.	Anticipated launch of contractor's services.

VII. Written Questions

Written questions and/or comments regarding this RFP must be in writing and received no later than 5 p.m. on Friday, August 12th, 2011. Questions should be e-mailed to Matthew Spaur (mspaur@WestEd.org). All questions will be responded to in writing. Offeror(s) invited to submit understand and agree that they have an affirmative duty to inquire and seek clarification regarding anything in this RFP that is unclear or open to more than one interpretation.

WestEd, at its sole discretion, may make questions submitted by offerors and responses to the submitted questions available to all offerors.

VIII. Submission

Electronic and physical copies of responses must be received by 5:00 p.m. Pacific time on the due date. Any response received after this date and time may be returned or not considered. Responses should be submitted electronically to Matthew Spaur at mspaur@WestEd.org. Additionally, five (5) copies with a postmark no later than the due date should be sent to Matthew Spaur at WestEd, 730 Harrison Street, Suite 500, San Francisco, CA 94107.

IX. WestEd Contact

All communications, including any requests for clarification, concerning this RFP should be addressed in writing to the following:

Matthew Spaur
 Branding & Visibility Manager
mspaur@WestEd.org

X. Cover Letter

The RFP must include a cover letter. The cover letter must be signed by the individual who is authorized to contractually bind the offeror. An unsigned cover letter may cause the proposal to be rejected. The letter must also contain the following:

1. The offeror's name, address, e-mail, telephone and facsimile number.
2. The offeror's Federal Employer Identification Number and, if applicable, Corporate Identification Number.
3. The name, title or position, e-mail address, and telephone number of the individual signing the cover letter on behalf of the offeror.
4. A statement, signed by the person purporting to have the authority to commit the offeror to terms of the proposal, indicating that the signer is authorized to legally bind the offeror to contract if the terms of the proposal are accepted by WestEd.
5. The name, title or position, e-mail address, and telephone number of the primary contact and/or account administrator, if different from the individual signing the cover letter.
6. An acknowledgement by the offeror that the proposal is a firm and irrevocable offer good for six (6) months from the date of the proposal.
7. A statement that the offeror has available the staff and other resources required to perform all services required by the RFP and to provide all required deliverables within specified time frames.

XI. Description of Work Sought

WestEd has hundreds of funding sources — from the federal government to local school districts, universities to private foundations — that support the agency's work serving schools and other education agencies, families, and communities. Through research, development of services and other resources, and partnerships, our approximately 600 staff members address many critical issues in human development and education, from the early care and education of young children and preservice education for teachers into higher education and the world of work. A key aspect of much of WestEd's work is the dissemination of relevant, research- or practice-based knowledge targeted to the needs of key audiences. Our clients include national and state governments, education and health agencies, state and local school districts, national education associations, community and family foundations, small businesses, and other nonprofit research and service firms.

WestEd uses numerous communications vehicles to build our brand recognition and perception in the education and human development marketplace, and to promote interest in and purchase of the goods and services we offer. We do engage in some direct marketing activities. Currently, we

do not as a general rule purchase advertising or sponsorships. We are interested in learning more about the quality, usefulness, and effectiveness of our main communications vehicles.

The breadth of WestEd's work and audience types makes it particularly challenging to successfully communicate our work to our stakeholders, which include employees, partners, funders, clients, and other interested parties. Our primary outreach vehicles, which are the focus of this RFP, are listed below. (Note that the bulleted list includes links to online or electronic versions of the materials. WestEd will also provide printed materials as appropriate.)

- WestEd.org: This is our agency's main website and our primary outreach vehicle. Currently, we rely on the website to introduce the agency to those unfamiliar with our work, to inform existing clients, funders, and other people familiar with WestEd of what's going on in the agency (e.g., new services, projects), to disseminate knowledge (e.g., new findings from a research study), and to market and sell products and services. The website acts as a detailed and dynamic "brochure" for the agency, as a marketing vehicle to help illustrate the depth and breadth of our continuing work, and as a dissemination vehicle for what WestEd researchers and developers are learning in the course of their work that might be helpful to others in the fields we serve. On the website we post new resources, including research and policy reports and books, for sale or free downloading, announce upcoming events, and highlight our fee-for service work. The website averages approximately 450,000 page views per month. Other than its URL being listed in virtually all of WestEd's printed materials, the website receives almost no off-line promotion.
- WestEd *R&D Alert*: WestEd produces three issues of *R&D Alert* annually. Each issue of this magazine contains four or five articles highlighting our research and development work. We recently redesigned this publication to streamline production. In addition, content is now more expansive in terms of research and substance. We mail hardcopy versions of the magazine to approximately 30,000 recipients. It is also available online as a PDF file. See Volume 12 Issue 1 at <http://www.wested.org/cs/we/view/rs/1066>.
- WestEd produces three direct mail catalogs annually to promote our products and services, with each catalog focusing on a different topic area. The most recent catalogs are:
 - * *English Learners and Literacy Products & Services Catalog* — http://www.wested.org/online_pubs/CM-11-02.pdf.
 - * *Science and Mathematics Products & Services Catalog* — http://www.wested.org/online_pubs/cm-11-01.pdf.
 - * *School and District Improvement Products & Services Catalog* — http://www.wested.org/online_pubs/cm-10-03.pdf.
- WestEd E-Bulletin: Our monthly, subscriber-based electronic newsletter highlights a selection of new and/or timely WestEd work, including resources, services, events, and research. Past editions are archived on WestEd.org. See, for example, the June 2011 E-Bulletin — http://www.wested.org/cs/we/print/cs_bmsg/2948.

- WestEd Annual Report: WestEd's in-house produced Annual Report serves as a yearly snapshot of major agency work. In addition, the report highlights the agency's fiscal health and provides a list of all agency funders, which numbered 395 in 2010. A pdf of our 2010 Annual Report is available online — http://www.wested.org/online_pubs/AN-11-01.pdf.
- Social Media: WestEd has a Facebook page and a Twitter account. We post items on our Facebook page approximately three times a week. Our Facebook posts primarily market our resources, services, research, and events. Our Twitter account is linked to our RSS feed; thus, a tweet is generated for any new WestEd.org page for events, publications, projects, services, and research studies. WestEd's Facebook page is available at <https://www.facebook.com/WestEd?ref=ts>. Our Twitter page can be accessed here: <http://twitter.com/#!/WestEd>

For the outreach vehicles listed above, we are seeking the following communications market research services:

- Produce and deliver a report containing your expert opinion as to the quality, usefulness, and effectiveness of these outreach vehicles in (1) reaching and informing the intended audiences, (2) strengthening and promoting the WestEd brand, and, ultimately, (3) contributing to the fiscal health of the agency. Within the report, define how you measure quality, usefulness, and effectiveness.
- Interview a cross-section of clients, potential clients, and stakeholders of WestEd about their opinions of the reviewed outreach vehicles in terms of quality, usefulness, and effectiveness. Produce and deliver a report describing and analyzing the interviews.
- Produce and deliver a report with recommendations on how to increase the usefulness and effectiveness of these outreach vehicles and suggest ways to more effectively use our limited marketing resources in our outreach efforts.
- Produce and deliver a report with recommendations on how to build, expand and segment our existing mailing lists.

In examining the quality, usefulness, and effectiveness of these outreach vehicles, the market research firm will investigate the following areas, though our interest is not limited these topics:

- Brand perception of WestEd.
- Likelihood to purchase goods and services from WestEd.
- Likelihood to recommend WestEd to those looking to purchase goods and services.

XII. Evaluation Criteria

An evaluation team will review, in detail, all proposals that are received. Following the initial review and screening of the proposals, using the selection criteria described below, offeror(s) may be invited to participate in the final selection process, which will include participation in an oral interview and/or submission of any additional information as requested by WestEd.

By use of numerical and narrative scoring techniques, proposals will be evaluated by WestEd against the factors specified below. The relative weights of the criteria—based on a 60-point scale—are shown in the following table. Information about each of the sections listed in the table below is found in Section XIII – RFP Questionnaire.

Criteria	Sections	Points
1. Qualifications, experience, references, and ability to carry out the described work	A, B, C, D, and E	30 points
2. Fees / expenses, and insurance	F and G	20 points
3. Other factors, including completeness of proposal, adherence to RFP instructions, other relevant factors not considered elsewhere	H	10 points

XIII. RFP Questionnaire

Please respond to the questionnaire below. No later than the due date, please submit one electronic copy of your responses to Matthew Spaur at mspaur@WestEd.org. Additionally, five (5) copies with a postmark no later than the due date should be sent to Matthew Spaur at 730 Harrison Street, Suite 500, San Francisco, CA 94107.

A. Offeror Company Information

1. Number of clients
2. Type of clientele (defined by industry and size of portfolio)
3. Number of staff
4. Organizational chart
5. Number of offices

6. Location of corporate headquarters
7. Related organizations
8. Discussion of any past or present litigation against your firm
9. Disclose any conditions that may impact your ability to fulfill contractual obligations (e.g., bankruptcy or other financial problems, pending litigation, planned office closures, impending merger)
10. An annual report or another documentation that exhibits the financial health of your firm, including profit and loss, assets and liabilities, and other relevant financial info.
11. Disclose any potential organization-level Conflicts of Interest
12. Please provide evidence that your firm is in good standing and qualified to conduct business in the State of California.

B. Team Personnel

1. Description of the offeror's team that would work with WestEd.
2. The location of the office that would be WestEd's primary point of contact.
3. The team that would provide services to WestEd (specifically, who would be WestEd's first point of contact).
4. A description of the team's background, qualifications, and relevant experience.
5. A team/relevant organizational chart and biographies.
6. Disclose any potential team-level Conflicts of Interest.
7. Please provide any other materials or information you feel would be helpful in familiarizing WestEd with your organization and team.

C. Qualifications, Related Experience, Customer Service, and References

1. What are the characteristics of your organization and team that differentiate you from other market research companies as it relates to the work in this RFP? What value do you bring to your clients that is unique to your organization?
2. Describe your firm's most noteworthy qualifications for providing communications market research services to WestEd.

3. Please describe your client support resources, including how many staff provide client support services, and what the normal escalation procedure looks like for resolving conflicts and disputes.
4. What is your process for ensuring customer satisfaction?
5. Please provide a list of five (5) relevant client references with contact information. Please include at least two (2) not-for-profit organizations and at least two (2) organizations of similar size to WestEd (as defined by annual revenues or numbers of employees).
6. Please include a list of your past and current clients in the education sector.

D. Reporting of Work Progress and Final Findings

1. Describe the frequency of reporting project status to clients (e.g.: weekly, monthly,)
2. Describe the form of your final reports to clients. Please provide a sample.

E. Survey Design and Execution

1. Please describe your firm's market research and interview methods and resources (external and internal)

F. Fees

1. Please describe your proposed fee structure. Indicate all fees involved for each of the services you are proposing to provide.

NOTE: Please indicate if any of this fee related information is confidential, proprietary and trade secret. If marked as such, please provide at least one additional copy of proposal in a format that has this confidential, proprietary and trade secret information redacted.

G. Insurance Coverage

1. Provide a listing of applicable insurance coverage maintained with relevant coverage limits.

H. Other

1. Describe any other facets of your organization and your firm's experience that are relevant to this RFP which have not been previously described and that you feel warrant consideration.