



NATIONAL ASSOCIATION OF
STATE TREASURERS

Request for Proposals for Public Relations & Communications Services

Date Issued: October 15, 2018

I. INTRODUCTION

The National Association of State Treasurers (NAST) seeks to provide advocacy and support that enables member states to pursue and administer sound financial policies and programs benefiting the citizens of the nation. Membership is comprised of all state treasurers or state finance officials with comparable responsibilities from the United States, its commonwealths, territories, and the District of Columbia and their staff. The private sector is represented through the Corporate Affiliate Program that was established to build professional relationships and foster cooperation between the public and private sectors.

Mission:

To advance sound financial practices, policies, and education through State Treasurers and other NAST members.

Vision:

To be the nation's foremost authority for responsible state treasury programs and related financial practices, policies, and education.

Values:

Ethics: Members and staff will hold themselves accountable and act with integrity and transparency representing the best practices of their office and the Association.

Expertise: NAST shall act as the collective authority on practices and policies related to finance and investment for state government and the citizens we serve.

Collectiveness: We will promote and facilitate the open and bipartisan exchange of time honored and innovative ideas and information, and seek out external collaborations wherever appropriate, to provide objective analyses and viable solutions to address state financial and investment concerns.

The association serves its members through educational conferences and webinars, a variety of working groups, policy advocacy and publications that provide information about developments in public finance. As part of its mission to be the nation's leading advocate for responsible state treasury programs and related financial practices and policies, NAST furthers its federal relations through the association's headquarters in Washington, DC. The organization's advocacy is guided by resolutions adopted by the membership.

NAST is a relatively small organization - managed day-to-day by the Executive Director, who is supported by 6 staff. In addition, there is a 13 member Executive Committee made up of Treasurers and leaders of the 3 networks and the Corporate Affiliate Advisory Board. The Executive Committee entrusts most communications and public relations decisions to the Executive Director, but serves as spokespeople for the Association based on leadership position and subject matter expertise. The Corporate Affiliate members also add subject matter expertise and work with NAST to not only promote their work, but help educate NAST members on key public finance issues. Despite its small size, NAST represents the trusted State Treasurers, and other state officials, in a bipartisan manner. This offers a unique opportunity to significantly enhance its public profile by leveraging that trusted membership profile and brand, including working with the communications staff within each Treasurer's office to co-promote our important work on behalf of state taxpayers.

Last year, NAST members adopted the 2018-2022 Strategic Plan which guides the work of the association. www.nast.org/strategicplan This document is the blueprint for the work we do. The first section outlines the continuous professional learning programming that NAST is currently implementing. NAST is very interested in hearing from an outside consultant on novel ideas for additional programs and services in this area. The expectations are high for this area with high potential for revenue growth and new member engagement.

NAST also partners with other state officials on issues of common interest related to college savings, unclaimed property, and the issuance and management of state debt. To that end, three networks have been created to support the partnership of NAST and these other state officials on the various programs of common interest offered by states.

The College Savings Plans Network

CSPN is a network of state administrators and their private sector partners who administer Section 529 qualified tuition plans dedicated to enhancing communication, cooperation and effective administration among the plans. CSPN seeks to influence the setting of national policy affecting Section 529 qualified tuition plans to ensure that

these programs remain an effective vehicle for families to save for college. In addition, CSPN seeks to promote public awareness and understanding of the purpose and value of saving for college and to be recognized as the primary authoritative and objective source for information concerning Section 529 qualified tuition plans. [CSPN Strategic Plan](#)

National Association of Unclaimed Property Administrators

The mission of NAUPA is to promote and support excellence and professionalism among those individuals charged with the responsibilities of unclaimed property administration and compliance. NAUPA provides a forum for continuing discussions regarding interstate cooperation, education, training, uniform laws, reporting requirements and increasing the public's awareness of the role the states play in protecting and returning property to rightful owners. [NAUPA Strategic Plan](#)

State Debt Management Network

SDMN brings together public officials to share information on issuance, management and oversight of public debt (i.e. bonds).

NAST also has numerous committees, special committees, and working groups (much of which can be found here: <https://nast.org/2018-executive-committee/>). All told, NAST serves approximately 1,270 members, which include the corporate affiliates.

Request for Proposals

We are requesting proposals from interested public relations firms to provide traditional and digital communications and public relations services. The following outline provides an overview of the specific work assignments NAST will expect the selected firm to complete. The agency will need to complete a comprehensive action plan for how the agency would approach each of the items listed below and the budget page should itemize the cost for completing each item listed.

Generally, the consultant will help NAST with its day-to-day media relations needs, including implementing the media relations calendar, building media relationships, fielding incoming media inquiries, developing responses, pitching stories and preparing members for press appearances. Traditional media activities are defined as media interviews, meetings with media, op-eds, statements, press releases, press conferences, media inquiries and related activities. Digital media activities are a growing part of NAST's communications and outreach efforts and the consultant will be expected to lead these efforts as well.

The goals include:

- promote NAST (including the networks) as the premiere official, objective source of information about issues such as: state public finance, investment and banking, college savings plans, ABLE savings plans, unclaimed property, the issuance and management of state debt, retirement security, investments, financial education and empowerment, disruptive technology and security, and other issues and trends to be identified;
- position the organization as a leading and trusted source of information for the media, policy makers (including legislative and regulatory bodies), and the public through traditional and digital platforms;
- support NAST's federal advocacy initiatives (including working with NAST-allied groups);
- drive traffic to NAST and its affiliated networks' websites, social media, and other online platforms;
- grow awareness of NAST's reputation and brands as well as those of our public and private members as appropriate;
- create marketing materials and other graphic design elements;
- contribute to member outreach and content development;
- assist in the development of NAST members as thought leaders;
- support the current and new continuous professional learning efforts;
- provide research and analytics on an ongoing basis; and
- produce clear measures of success of these goals.

Terms of Contract

NAST intends to enter into a 2-year contract with the selected firm starting early January 2019 with 3 option years, which will be based on performance of the vendor against pre-established metrics to be included in the final contract.

II. Scope of Services

The following areas have been identified as potential strategies to achieve the goals stated above. These items should not be considered an exhaustive listing of tactics to be employed to meet the stated goals. We welcome recommendations to add (or subtract) tactics and strategies to this list that can further enhance our ability to provide valuable information to all NAST members.

Media Relations, Public Affairs, and Marketing

- Develop relevant messaging in response to current and future opportunities and events.
- Develop and coordinate media events to promote all areas described above, to promote events, or in response to external events that require a proactive response.
- Schedule media interviews for staff and/or members to promote NAST events, or in response to external events that require a proactive response.
- Draft news releases, advisories and backgrounders to promote NAST issues, to promote events, or in response to external events that require a proactive response.
- Proactively identify opportunities for media coverage, both nationally and in various states as applicable. Maintain and expand relevant media lists.
- Tracking stories in the national media, to 1) identify stories which require a response from NAST and 2) monitor effectiveness of organization's own press releases, story pitches and activities.

NAST Morning Brief

- Prepare the daily newsletter Monday-Friday. This task includes: identifying the content, summarizing it, designing/formatting the layout, while working with NAST staff to ensure relevancy. Currently, the Monday-Thursday newsletters are issue based, while Friday's version contains state news.
- Ensure that NAST marketing and announcements are prominently displayed.
- Provide graphics and videos as necessary.
- Audit and recommend adjustments to the newsletter. Currently, this is daily, but high possibility that the number of emails will decrease due to recent member feedback.

Social Media and Online Engagement

- Evaluate and recommend enhancements to and the promotion of the various NAST websites including "nast.org", "CollegeSavings.org" and "unclaimed.org" including the possibility of consolidation of the sites.
- Develop and then implement a plan to increase engagement and followers on all current and relevant online social media (e.g. Facebook, Twitter, LinkedIn, etc.) platforms. NAST recognizes the value of these platforms and is looking to be a leader of public finance engagement.
- Create appropriate and effective video recordings of Treasurers and other NAST members and conference attendees to promote the association's work.

Member Outreach and Content Production

- Support individual members with drafting and placement of op-eds, columns, and other types of written articles.
- Conceive and design items such as fliers/infographics, reports, and other marketing documentation.
- Assist in the development of new materials for the members.
- Assist in the redesign of conference brochures and programs.

Reputation, Branding and Thought Leadership Development

- Focus on building NAST’s reputation and “brand” by developing and presenting a well-differentiated value proposition.
- Review and suggest options with respect to streamlining our multiple brands.
- Develop and maintain our members as “thought leaders.”

Conference & Other Continuous Professional Learning Support

- Provide support staff to attend NAST conferences and conduct traditional and online media outreach, take photos, and capture video, which will then be used for future marketing.
- Assist with marketing and outreach for programming such as webinars and other online events, radio, TV, etc.

Analytical Support and Research

- Provide assistance with digital analysis of traditional and online platforms.
- Conduct initial research, such as media placement.
- Attend relevant conference calls to ensure continuity of work.

III. Issuing Information

This RFP is issued on behalf of NAST. The following individual will serve as the Issuing Officer from the date of release of this RFP until a contract is awarded:

Chris Hunter, Deputy Executive Director
National Association of State Treasurers
Email: chris@statetreasurers.org

Restriction on Communication

From the issue date of this RFP until announcement of the successful Vendor, Vendors may contact only the Issuing Officer via email. The Issuing Officer will respond only to questions via email. Vendors may be disqualified if they contact any NAST employee other than the Issuing Officer.

Proprietary Information

Any and all information provided to proposers is to be considered proprietary information and is to be used solely for the purpose of responding to this RFP. Such information is not to be released to any party outside the proposer’s organization without the explicit written consent of NAST.

IV. SCHEDULE OF EVENTS AND STRUCTURE OF PROPOSALS

Date	Event
October 15, 2018	RFP issued and distributed to potential vendors
October 24, 2018	Deadline for submitting written questions
October 31, 2018	Responses to written questions
November 12, 2018	RFP responses due by 5:00 P.M. Eastern Time
November 19, 2018	Deadline for initial evaluation of proposals
Weeks of November 26 and December 3 rd .	Possible interviews of finalists
December 7, 2018	Notification of chosen vendor / Begin contract discussion
January 1, 2019	Implement contract

Note: This Schedule of Events is subject to change.

Questions and Requests for Clarification

Vendors may submit written questions and requests for clarification regarding the RFP. The questions or requests for clarification must be via e-mail and received by the Issuing Officer before 5:00 p.m. Eastern on October 22, 2018. Oral inquiries will not be permitted. If a question or request for clarification pertains to a specific section of the RFP, the page and section number must be referenced. Issuing Officer will post all questions and requests for clarification received and responses on the NAST website at <https://nast.org/rfps/> by October 29, 2018.

Amendment to the RFP and Bid Proposal and Withdrawal of Bid Proposal

NAST reserves the right to amend the RFP at any time. The Vendor shall acknowledge receipt of any and all amendments in its proposal. If the amendment occurs after the closing date for receipt of bid proposals, NAST may, in its sole discretion, allow Vendors to amend their bid proposals in response to the amendment if necessary.

The Vendor may amend its bid proposal. The amendment must be in writing, signed by the Vendor and received via email by the time set for the receipt of proposals. Vendors who submit proposals in advance of the deadline may withdraw, modify, and resubmit proposals at any time prior to the deadline for submitting proposals. Vendors must notify the Issuing Officer via email if they wish to withdraw their proposals.

Submission of Bid Proposals

The Issuing Officer must receive the bid proposal at the email address set forth above before 5:00 p.m. Eastern, November 12, 2018. This is a mandatory requirement and will not be waived by NAST. Any bid proposal received after this deadline will be rejected. It is the Vendor's responsibility to ensure that the bid proposal is received prior to the deadline. Vendors must furnish all information necessary to evaluate the bid proposal. Bid proposals that fail to meet the mandatory requirements of the RFP will be disqualified. Verbal information provided by the Vendor shall not be considered part of the Vendor's proposal.

Bid Proposal Opening

The bid proposals will remain confidential until the evaluation committee has reviewed all of the bid proposals submitted in response to this RFP and NAST has announced a notice of intent to award a contract.

Costs of Preparing the Bid Proposal

The costs of preparation and delivery of the bid proposal is solely the responsibility of the Vendor submitting such proposal.

Rejection of Bid Proposals

NAST reserves the right to reject any or all bid proposals, in whole and in part, received in response to this RFP. Issuance of this RFP in no way constitutes a commitment by NAST to award a contract.

Disqualification

NAST may reject proposals outright for any one of the following reasons:

- The Vendor fails to deliver the bid proposal by the due date and time.
- The Vendor states that a service requirement cannot be met.
- The Vendor's response materially changes a service requirement.
- The Vendor's response limits the rights of NAST.
- The Vendor fails to include information necessary to substantiate that it will be able to meet a service requirement. A response of "will comply" or merely repeating the requirement is not sufficient. Responses must indicate present capability; representations that future developments will satisfy the requirement are not sufficient.
- The Vendor fails to respond to NAST's request for information, documents or references.
- The Vendor fails to include any signature, certification, authorization, stipulation, disclosure or guarantee requested of this RFP.
- The Vendor presents the information requested by this RFP in a format inconsistent with the instructions of the RFP.
- The Vendor initiates unauthorized contact regarding the RFP with NAST employees.

- The Vendor provides misleading or inaccurate responses.

Nonmaterial and Material Variances

NAST reserves the right to waive or permit cure of nonmaterial variances in the bid proposal if, in the judgment of NAST, it is in NAST's best interest to do so. Nonmaterial variances include minor informalities that do not affect responsiveness; that are merely a matter of form or format; that do not change the relative standing or otherwise prejudice other Vendors; that do not change the meaning or scope of the RFP; or that do not reflect a material change in the services. In the event NAST waives or permits cure of nonmaterial variances, such waiver or cure will not modify the RFP requirements or excuse the Vendor from full compliance with RFP specifications or other contract requirements if the Vendor is awarded the contract. The determination of materiality is in the sole discretion of NAST.

Reference Checks

NAST reserves the right to contact any reference to assist in the evaluation of the bid proposal, to verify information contained in the bid proposal and to discuss the Vendor's qualifications.

Information from Other Sources

NAST reserves the right to obtain and consider information from other sources concerning a Vendor, such as the Vendor's capability and performance under other contracts.

Verification of Bid Proposal Contents

The content of a bid proposal submitted by a Vendor is subject to verification. Misleading or inaccurate responses may result in disqualification.

Bid Proposal Clarification Process

NAST reserves the right to contact a Vendor after the submission of bid proposals for the purpose of clarifying a bid proposal to ensure mutual understanding. NAST will not consider information received if the information materially alters the content of the bid proposal. An individual authorized to legally bind the Vendor shall sign responses to any request for clarification. Responses shall be submitted to NAST within the time specified in the request. Failure to comply with requests for additional information may result in rejection of the bid proposal as noncompliant.

Disposition of Bid Proposals

All proposals become the property of NAST and shall not be returned to the Vendor unless all bid proposals are rejected or the RFP is cancelled.

Copyrights

By submitting a bid proposal, the Vendor agrees that NAST may copy the bid proposal for purposes of facilitating the evaluation of the bid proposal. The Vendor consents to such copying by submitting a bid proposal and warrants that such copying will not violate the rights of any third party. NAST shall have the right to use ideas or adaptations of ideas that are presented in the bid proposals.

Release of Claims

By submitting a bid proposal, the Vendor agrees that it will not bring any claim or cause of action against NAST based on any misunderstanding concerning the information provided herein or concerning NAST's failure, negligent or otherwise, to provide the Vendor with pertinent information as intended by this RFP.

Acceptance of Terms and Conditions

The Vendor shall specifically agree that the bid proposal is predicated upon the acceptance of all terms and conditions stated in the RFP. If the Vendor objects to any term or condition, the Vendor must specifically refer to the RFP page and section. Objections or responses that materially alter the RFP may be deemed non-responsive and disqualify the Vendor.

Evaluation of Bid Proposals Submitted

Bid proposals that are timely submitted and are not subject to disqualification will be reviewed in accordance with Article 5 of the RFP.

Choice of Law and Forum

This RFP and the resulting contract are to be governed by the laws of the District of Columbia. Changes in applicable laws and rules may affect the award process or the resulting contract. Vendors are responsible for ascertaining pertinent legal requirements and restrictions. Any and all litigation or actions commenced in connection with this RFP shall be brought in the appropriate District of Columbia forum.

No Minimum Guaranteed

NAST anticipates that the selected Vendor will provide services as requested by NAST. NAST will not guarantee any minimum compensation will be paid to the Vendor or any minimum usage of the Vendor's services.

Certification of Independence and No Conflict of Interest

The Vendor shall certify that it developed the bid proposal independently. The Vendor shall also certify that no relationship exists or will exist during the contract period between the Vendor and NAST that interferes with fair competition or is a conflict of interest. NAST reserves the right to reject a bid proposal or cancel the award if, in their discretion, any relationship exists that could interfere with fair competition or conflict with the interests of NAST.

Vendor Bid Proposal Terms

Terms of the proposal, including price, will remain firm for a minimum of 90 days following the deadline for submitting proposals.

V. PROPOSAL REQUIREMENTS

Instructions

These instructions prescribe the format and content of the bid proposal. They are designed to facilitate a uniform review process. Failure to adhere to the proposal format may result in the disqualification of the bid proposal.

- The proposal shall be an Adobe PDF document using 8.5" x 11" paper size.
- The proposal shall be an attachment to an email addressed to the issuing officer listed previously. The subject line of the email should be "Proposal for Communication and Public Relations Services."
- The following electronic documents and responses shall be included in the bid proposal in the order given below:

A. Company Background – In order to be considered for selection, the following should be included in the proposal as proof that the following minimum qualifications listed below are met. The Respondent has a continuing obligation to disclose information throughout the RFP process should any qualifications or situations change that might render the Respondent as an unqualified candidate.

1. Name of agency.
2. Federal tax identification number.
3. Business address and phone number.
4. Principle contact (phone and email address).
5. Please give a brief description of your operation as you would describe it to prospective clients. Include evidence the firm has five years' experience in providing public relations services in the same manner as described in this RFP.
6. Please indicate the year the agency was founded. Indicate if it has it operated continuously since that time.
7. Please submit an organizational chart of your staff by title and indicate the number of full-time professionals. In addition, attach biographies of the principals.

8. List all services offered by the agency, excluding those which are subcontracted. Please provide a list of subcontractors that may be used for this account.
9. List four clients with a brief description of the work you do for each account (respondent should include accounts with similar scope and or purpose as is described in this RFP) and indicate the following for each: client name, a reference contact and telephone number.
10. Provide the names of all persons that will be assigned to work on this contract. Include evidence that the key personnel has three years' experience managing an account with similar scope as is described in this RFP.
11. The firm and its personnel has all authorizations, permits, licenses, and certifications as may be required under federal, state or local law to perform the services specified in this RFP at the time it submits a response to the RFP.
12. The firm has a policy and practice of equal employment opportunity and non-discrimination based on race, age, creed or gender.

B. Action Plan for Scope of Services

Provide a project narrative which describes the agency's overall approach including strategies for accomplishing the Scope of Services and rationale for the agency's approach. For each service requested please provide an overview of your approach, including your rationale for proposing any alternative strategies, and how you feel you could successfully implement the services requested.

C. Work Schedule for Completing Scope of Services

Provide a work schedule that outlines timelines and completion dates for each of the itemized requirements in the Scope of Services.

D. Measurement Plan

Provide a measurement plan that details metrics to be used to determine the success of the implementation of the itemized requirements in the Scope of Services.

E. Budget

Provide a comprehensive budget page detailing the total costs for the projects listed in the Scope of Services. Separate cost details should be provided for each item of the components. Also show the compensation to your agency as a separate item for each component.

F. Provide details of any state regulatory, self-regulatory organization, professional organization, litigation or other legal proceedings action taken against your firm or any of its owners, principals, or personnel, in the three preceding years.

G. NAST is interested in providing flexibility to all Vendors in their responses to this RFP. Provide any additional comments or information relevant to your proposal that has not already been included in your responses to the preceding questions.

VI. Evaluation and Selection

All proposals timely received will be considered by NAST.

Discussions and/or Presentations

After the review and evaluation of the proposals, NAST may conduct interviews. Finalists chosen for interviews will be notified. NAST reserves the right, in its sole discretion, to award the contract based upon the written proposals received without prior discussion or negotiations.

Selection

NAST will select/recommend the firm that NAST determines, in its sole discretion, to be fully qualified and best suited among those submitting proposals to fulfill the purposes of the RFP in a cost-effective manner.

EVALUATION CRITERIA

Corporate Information

Evidence of corporate maturity, fiscal stability and full-time senior and intermediate staff resources to provide the services outlined in the Scope of Services.

Account Services

Past, current and prospective services demonstrating capabilities to mount and execute a marketing program outlined in the Scope of Services.

Account Team

Professional qualifications and work experience on similar project engagements of the account team members who will be primarily responsible for the work performed in the Scope of Services.

Action Plan for Scope of Services

An understanding of the Scope of Services to be performed and evidence of the capabilities and creativity necessary to perform the Scope of Services in a manner that is the most advantageous to NAST.

Cost of Services

Evidence that services will be reasonably priced and provide a good value to NAST.