



AIRA

AMERICAN IMMUNIZATION
REGISTRY ASSOCIATION

Communication Materials Design & Development

Request for Proposal

June 2021

GENERAL INFORMATION

Project Title: Communication Materials Design & Development

Purpose: The purpose of this RFP is to secure the services of a highly qualified Contractor or Firm to develop print and online communication materials to educate about and promote the American Immunization Registry Association (AIRA), its products and programs, and immunization information systems (IIS).

Proposal Due Date: 7/2/2021

Only e-mailed bids will be accepted. Faxed or mailed bids will not be accepted.

Estimated Time Period for Contract: August 1, 2021–July 31, 2022

AIRA reserves the right to extend the contract at its sole discretion.

Consultant Eligibility:

This procurement is open to those consultants that satisfy the minimum qualifications stated herein.

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1. INTRODUCTION

1.1. PURPOSE AND BACKGROUND

The American Immunization Registry Association, hereafter called “AIRA” is initiating this Request for Proposals (RFP) to solicit proposals from contractors and firms able to develop communications materials (including print and online resources) promoting AIRA, its products and programs, and immunization information systems (IIS).

AIRA intends to award one contract to provide the services described in this RFP.

AIRA is a membership organization that promotes the development and implementation of IIS as an important tool in preventing and controlling vaccine-preventable diseases. The organization provides a forum through which IIS programs, and interested organizations, individuals, and communities combine efforts, share knowledge, and promote activities to advance IIS and immunization programs.

IIS, sometimes known as immunization registries, are confidential, population-based, computerized databases that record all immunization doses administered by participating health care providers to persons residing within a given geopolitical area. At the point of clinical care, an IIS can provide consolidated immunization histories for use by a vaccination provider in determining appropriate patient vaccinations. At the population level, an IIS provides aggregate data on vaccinations for use in surveillance and program operations, and in guiding public health action with the goals of improving immunization rates and reducing vaccine-preventable disease.

Since its inception, AIRA has developed a variety of resources and best practice guidance documents to address specific operational and technical issues critical to successful IIS program management. Likewise, AIRA hosts webinars, regional workshops, and an annual national meeting for its members, all aimed at improving the planning, implementation, and management of IIS. Over time, AIRA has become the leading authority for all things related to IIS. AIRA has experienced rapid growth over the past several years and is anticipating additional opportunities that will further its reach in the coming years. With this effort, AIRA wants to develop communication materials to promote the association, its products and programs, and IIS.

1.2. OBJECTIVES AND SCOPE OF WORK

AIRA has two main objectives with respect to this effort:

- 1) To gain access to communications and graphic design resources to develop communication materials as priority messaging and educational needs are identified.

- 2) To develop a variety of communication materials that can be used to promote and educate about IIS and immunization data exchange. Ideally these materials would showcase the value of IIS and the benefit of IIS to public health.

This project will consist of two main phases:

Phase 1: Knowledge Transfer

AIRA recognizes that the selected agency may not have knowledge about IIS or AIRA. AIRA will meet with the agency staff who will be dedicated to this contract, in advance of any projects, to educate the staff about AIRA and IIS. This knowledge transfer is important and will help the contractor or firm understand the content and facilitate the development of communication materials.

To ensure continuity, AIRA requests to work with the same staff or group of staff on each project. If there is staff turnover, AIRA requests a meeting with new staff assigned to this contract to get them up to speed or expects the selected agency to provide necessary background information on AIRA and IIS to any new employee assigned to this contract.

Interested agencies or firms are encouraged to specify, as part of the proposal, how they would structure and facilitate these knowledge transfer meetings to gain the information necessary to successfully accomplish the second phase of the project.

Phase 2: Development of Print & Online Communication Materials to Promote IIS

AIRA desires the development of communication materials for its members, partners and the public that promote and educate about IIS. These materials would be informational, visually appealing, contain graphics, and cover a variety of topics.

The goal of these materials is to educate external partners and agencies and the public about IIS and illustrate the importance and value of IIS. The audience for these materials will primarily be external partners and agencies involved in public health, immunizations, and health information technology including legislators; the public; AIRA members; healthcare; and health information technology developers and implementers.

The selected agency will also support the Immunization Integration Program (IIP) jointly led by AIRA and the Health Information Management Systems Society (HIMSS) to address immunization data sharing challenges and support interoperability between immunization information systems (IIS) and electronic health records (EHRs). The IIP is a HIMSS branded program, and the selected vendor will collaborate with the HIMSS Marketing and Communications team to develop materials that meet AIRA's requirements while aligning with HIMSS' marketing and communications strategies.

There is not a set number of materials to be created at this time. AIRA is seeking a contractor or firm that will be on retainer and available to consult with lead AIRA staff

on projects as they arise. The content of each resource will be finalized by a collaborative process between AIRA and the selected agency. AIRA has the subject-matter expertise in this area but anticipates using the selected agency's guidance and expertise in communications and graphic design to narrow the focus, draft, and finalize the content so it is appropriate for the target audience. To ensure consistency with AIRA's brand, a branding guide will be shared with the selected agency.

These communication materials will be made available on AIRA's website. In addition, copies will be printed and distributed at AIRA events, as well as at national partner and external stakeholder meetings, when appropriate. AIRA will allow its members to print and distribute these resources locally, as well. Costs for printing and distribution will be at AIRA's expense.

The selected agency shall provide all the necessary personnel, equipment, materials, goods and services, and otherwise do all things necessary for or incidental to the performance of the work described above.

Interested agencies or firms are encouraged to specify, as part of the proposal, the process they would follow to develop the communication materials, so that they align with the needs AIRA has identified and are appropriate for the target audience.

Project Timeline

AIRA anticipates finalizing the contract with the selected agency by August 2021. The contract is expected to be for one year, ending in July 2022.

The first phase (knowledge transfer) should be completed within the first two months of the project period.

The second phase (materials development) will be completed within agreed upon timeframes as projects arise.

Approval Process

The selected agency will primarily work with two or three AIRA staff members to secure approval. We envision having multiple rounds of review (minimum of three) for each deliverable. Sign-off for the early rounds of revision will be in collaboration with AIRA professional staff. The third and/or final rounds will be approved by AIRA's Executive Director. In addition, materials developed for the IIP may require HIMSS and subject matter expert review which will be coordinated by IIP staff.

Project Budget

AIRA has a budget of \$75,000 for this project.

1.3. MINIMUM QUALIFICATIONS

Successful agencies will possess the following specific skills needed to successfully execute this project:

- Minimum of five years of design experience.
- Mastery of effective print and online design and layout work, and graphic design, specifically infographic development.
- Experience working with nonprofits.
- Experience working with public health organizations.
- Experience developing communication and educational materials.
- Experience with collaborative processes and facilitating agreement.
- Solid writing and verbal communications skills.
- Ability to meet deadlines.

1.4. FUNDING

AIRA seeks a time and materials proposal for this project. All expenses must be included in the proposal.

Any contract awarded because of this procurement is contingent upon the availability of funding.

1.5. PERIOD OF PERFORMANCE

The period of performance of any contract resulting from this RFP is tentatively scheduled to begin on August 1, 2021 and to end on July 31, 2022.

Amendments extending the period of performance and/or contract renewals for additional deliverables shall be at the sole discretion of AIRA.

1.6. DEFINITIONS

AIRA – The American Immunization Registry Association is the association that is issuing this RFP.

Apparent Successful Contractor – The consultant selected as the entity to perform the anticipated services, subject to completion of contract negotiations and execution of a written contract.

Consultant – Individual or company interested in the RFP and that may or does submit a proposal to attain a contract with the AIRA.

Contractor – Individual or company whose proposal has been accepted by the AIRA and is awarded a fully executed, written contract.

IIP – Immunization Integration Program, a jointly led effort between AIRA and HIMSS that requires coordination across agencies to develop marketing materials.

HIMSS – Health Information Management System Society

Proposal – A formal offer submitted in response to this solicitation.

Proposer - Individual or company that submits a proposal to attain a contract with the AIRA.

Request for Proposals (RFP) – Formal procurement document in which a service or need is identified but no specific method to achieve it has been chosen. The purpose of an RFP is to permit the consultant community to suggest various approaches to meet the need at a given price.

2. GENERAL INFORMATION

2.1. RFP COORDINATOR

The RFP Coordinator is the sole point of contact in AIRA for this procurement. All communication between the Consultant and AIRA upon release of this RFP shall be with the RFP Coordinator, as follows:

Name: Amanda Dayton
E-Mail Address: admin@immregistries.org
Mailing Address: 1717 Pennsylvania Ave NW, Suite 1025, Washington, DC 20006
Phone Number: (202) 552-0208 Extension 406

Any other communication will be considered unofficial and non-binding on AIRA. Consultants are to rely on written statements issued by the RFP Coordinator. Communication directed to parties other than the RFP Coordinator may result in disqualification of the Consultant.

2.2. ESTIMATED SCHEDULE OF PROCUREMENT ACTIVITIES

Issue Request for Proposals	6/1/2021
Question & answer period	6/1 – 6/18/2021
Issue last addendum to RFP	6/25/2021
Proposals due	7/2/2021
Evaluate proposals	7/5 – 7/16/2021
Conduct oral interviews with finalists, if required	7/19 – 7/21/2021
Announce “Apparent Successful Contractor” and send notification via e-mail to unsuccessful proposers	7/26/2021
Finalize contract	7/30/2021

AIRA reserves the right to revise the above schedule.

2.3. SUBMISSION OF PROPOSALS

ELECTRONIC PROPOSALS:

The proposal must be received by the RFP Coordinator no later than 5 pm Eastern Daylight Time on 7/2/2021.

Proposals must be submitted electronically as an attachment to an e-mail to Amanda Dayton, the RFP Coordinator, at the e-mail address listed in Section 2.1. Attachments to e-mail shall be in Microsoft Word format or PDF. Zipped files cannot be received by AIRA and cannot be used for submission of proposals. The cover submittal letter and the Certifications and Assurances form must have a scanned signature of the individual within the organization authorized to bind the Consultant to the offer. AIRA does not assume responsibility for problems with Consultant's e-mail. If AIRA'S email is not working, appropriate allowances will be made.

Proposals may not be mailed or transmitted using facsimile transmission.

Consultants should allow sufficient time to ensure timely receipt of the proposal by the RFP Coordinator. Late proposals will not be accepted and will be automatically disqualified from further consideration, unless AIRA'S e-mail is found to be at fault.

2.4. PROPRIETARY INFORMATION

Proposals and any accompanying documentation submitted in response to this competitive procurement shall become the property of AIRA and will not be returned.

2.5. REVISIONS TO THE RFP

In the event it becomes necessary to revise any part of this RFP, addenda will be provided via e-mail to all individuals, who have made the RFP Coordinator aware of their interest. Addenda will also be published on www.immregistries.org. For this purpose, the published questions and answers and any other pertinent information shall be provided as an addendum to the RFP and will be placed on the website.

AIRA also reserves the right to cancel or to reissue the RFP in whole or in part, prior to execution of a contract.

2.6. RESPONSIVENESS

All proposals will be reviewed by the RFP Coordinator to determine compliance with administrative requirements and instructions specified in this RFP. The Consultant is specifically notified that failure to comply with any part of the RFP may result in rejection of the proposal as non-responsive.

AIRA also reserves the right at its sole discretion to waive minor administrative irregularities.

2.7. MOST FAVORABLE TERMS

AIRA reserves the right to make an award without further discussion of the proposal submitted. Therefore, the proposal should be submitted initially on the most favorable terms which the Consultant can propose. There will be no best and final offer procedure. AIRA does reserve the right to contact a Consultant for clarification of its proposal.

The Apparent Successful Contractor should be prepared to accept this RFP for incorporation into a contract resulting from this RFP. Contract negotiations may incorporate some or the Consultant's entire proposal. It is understood that the proposal will become a part of the procurement file on this matter without obligation to AIRA.

2.8. CONTRACT AND GENERAL TERMS & CONDITIONS

The apparent successful contractor will be expected to enter into a contract which is substantially the same as the submitted RFP. In no event is a Consultant to submit its own standard contract terms and conditions in response to this solicitation. The Consultant may submit exceptions as allowed in the Certifications and Assurances form, Appendix A to this solicitation. All exceptions to the contract terms and conditions must be submitted as an attachment to Appendix A, Certifications and Assurances form. AIRA will review requested exceptions and accept or reject the same at its sole discretion.

2.9. COSTS TO PROPOSE

AIRA will not be liable for any costs incurred by the Consultant in preparation of a proposal submitted in response to this RFP, in conduct of a presentation, or any other activities related to responding to this RFP.

2.10. NO OBLIGATION TO CONTRACT

This RFP does not obligate AIRA to contract for services specified herein.

2.11. REJECTION OF PROPOSALS

AIRA reserves the right at its sole discretion to reject any and all proposals received without penalty and not to issue a contract as a result of this RFP.

2.12. COMMITMENT OF FUNDS

The Executive Director of AIRA or her delegate is the only individual who may legally commit AIRA to the expenditures of funds for a contract resulting from this RFP. No cost chargeable to the proposed contract may be incurred before receipt of a fully executed contract.

3. PROPOSAL CONTENTS

Proposals must be written in English and submitted electronically to the RFP Coordinator in the order noted below:

1. Letter of Submittal, including signed Certifications and Assurances (Appendix A to this RFP);
2. Proposed Approach;
3. Organizational Capacity; and,
4. Cost Proposal.

Proposals must provide information in the same order as presented in this document with the same headings. This will not only be helpful to the evaluators of the proposal, but should assist the Consultant in preparing a thorough response.

Items marked “mandatory” must be included as part of the proposal for the proposal to be considered responsive; however, these items are not scored. Items marked “scored” are those that are awarded points as part of the evaluation conducted by the evaluation team.

3.1. LETTER OF SUBMITTAL (Mandatory)

The Letter of Submittal and the attached Certifications and Assurances form (Appendix A to this RFP) must be signed and dated by a person authorized to legally bind the Consultant to a contractual relationship, e.g., the President or Executive Director if a corporation, the managing partner if a partnership, or the proprietor if a sole proprietorship. Along with introductory remarks, the Letter of Submittal is to include by attachment the following information about the Consultant and any proposed subcontractors:

1. Name, address, principal place of business, telephone number, and e-mail address of legal entity or individual with whom contract would be written.
2. Name, address, and telephone number of each principal officer (President, Vice President, Treasurer, Chairperson of the Board of Directors, etc.).
3. Legal status of the Consultant (sole proprietorship, partnership, corporation, etc.) and the year the entity was organized to do business as the entity now substantially exists.
4. Federal Employer Tax Identification number or Social Security number.
5. Location of the facility from which the Consultant would operate.

3.2. PROPOSED APPROACH (SCORED)

The Proposed Approach must contain a comprehensive description of services including the following elements:

- A. Project Approach/Methodology** – Include a complete description of the Consultant’s proposed approach and methodology for the project. This section should convey Consultant’s understanding of the proposed project.
- B. Work Plan** – Include all project requirements and the proposed tasks, services, activities, etc. necessary to accomplish the scope of the project defined in this RFP. This section of the proposal must contain sufficient detail to convey to members of the evaluation team the Consultant’s knowledge of the subjects and skills necessary to successfully complete the project. Include any required involvement of AIRA staff and AIRA committees. The Consultant may also present any creative approaches that might be appropriate and may provide any pertinent supporting documentation.

- C. Project Schedule** – Include a project schedule indicating when the elements of the work will be completed. Project schedule must ensure that any deliverables requested are met within the specified timeframes.
- D. Outcomes and Performance Measurement** – Describe the impacts/outcomes the Consultants propose to achieve as a result of the delivery of these services including how these outcomes would be monitored, measured and reported to AIRA.
- E. Risks** – The Consultant must identify potential risks that are considered significant to the success of the project. Include how the Consultant would propose to effectively monitor and manage these risks, including reporting of risks to AIRA's RFP Coordinator.
- F. Deliverables** – Fully describe deliverables to be submitted under the proposed contract. Deliverables must support the requirements set forth in Section 1.2, Objectives and Scope of Work.

3.3. ORGANIZATIONAL CAPACITY (SCORED)

A. Project Management (SCORED)

1. **Project Team Structure/Internal Controls** - Provide a description of the proposed project team structure and internal controls to be used during the course of the project, including any subcontractors. Provide an organizational chart of your firm indicating lines of authority for personnel involved in performance of this potential contract and relationships of this staff to other programs or functions of the firm. This chart must also show lines of authority to the next senior level of management. Include who within the firm will have prime responsibility and final authority for the work.
2. **Staff Qualifications/Experience** - Identify staff, including subcontractors, who will be assigned to the potential contract, indicating the responsibilities and qualifications of such personnel, and include the amount of time each will be assigned to the project. Provide resumes for the named staff, which include information on the individual's particular skills related to this project, education, experience, significant accomplishments and any other pertinent information. The Consultant must commit that staff identified in its proposal will actually perform the assigned work. Any staff substitution must have the prior approval of AIRA.

B. Experience of the Consultant (SCORED)

1. Indicate the experience the Consultant and any subcontractors have in developing print and online communications materials.
2. Indicate other relevant experience that indicates the qualifications of the Consultant, and any subcontractors, for the performance of the potential contract.

3. Include a list of contracts the Consultant has had during the last five years that relate to the Consultant's ability to perform the services needed under this RFP. List contract reference numbers, contract period of performance, contact persons, telephone numbers, and fax numbers/e-mail addresses.

C. Related Information (MANDATORY)

1. If the Consultant has had a contract terminated for default in the last five years, describe such incident. Termination for default is defined as notice to stop performance due to the Consultant's non-performance or poor performance and the issue of performance was either (a) not litigated due to inaction on the part of the Proposer, or (b) litigated and such litigation determined that the Proposer was in default.
2. Submit full details of the terms for default including the other party's name, address, and phone number. Present the Consultant's position on the matter. AIRA will evaluate the facts and may, at its sole discretion, reject the proposal on the grounds of the past experience. If no such termination for default has been experienced by the Consultant in the past five years, so indicate.

D. References (MANDATORY)

List names, addresses, telephone numbers, and e-mail addresses of three (3) business references for the Consultant and three (3) business references for the lead staff person for whom work has been accomplished and briefly describe the type of service provided. Do not include current AIRA staff as references. By submitting a proposal in response to this Work Request, the vendor and team members grant permission to AIRA to contact these references and others, who from AIRA's perspective, may have pertinent information. References will be evaluated at AIRA's discretion.

E. Examples (MANDATORY)

Provide 3-5 samples of relevant work (web links or URLs are sufficient). Please include examples of print and video marketing materials, as well as a sample strategic communication plan.

3.4. COST PROPOSAL (SCORED)

Provide a budget for conducting the project, and justification reasonable and consistent with stated objectives and planned program activities.

The cost proposal must include the Consultant's hourly rate, as well as an estimate of the number of hours to be allocated to each phase of the project. The evaluation process is designed to award this procurement not necessarily to the Consultant of least cost, but rather to the Consultant whose proposal best meets the requirements of

this RFP. However, Consultants are encouraged to submit proposals which are consistent with conserving resources.

4. EVALUATION AND CONTRACT AWARD

4.1. EVALUATION PROCEDURE

Responsive proposals will be evaluated strictly in accordance with the requirements stated in this solicitation and any addenda issued. The evaluation of proposals shall be completed by an evaluation team(s), to be designated by AIRA, which will determine the ranking of the proposals.

AIRA, at its sole discretion, may elect to select the top-scoring firms as finalists for an oral presentation.

The RFP Coordinator may contact the Consultant for clarification of any portion of the Consultant’s proposal.

4.2. EVALUATION WEIGHTING AND SCORING

AIRA will conduct a review of all eligible proposals. The following weighting and points will be assigned to the proposal for evaluation purposes:

	Maximum Points	Percentage
Proposed Approach	35	35%
Project Approach/Methodology	10	
Quality of Work Plan	10	
Project Schedule	5	
Outcomes/Performance Measurement & Risk	5	
Project Deliverables	5	
Organizational Capacity	35	35%
Project Team Structure and Internal Controls	5	
Staff Qualifications/Experience	15	
Experience of the Consultant	15	
Cost Proposal	30	30%
TOTAL	100	100%

AIRA reserves the right to award the contract to the Consultant whose proposal is deemed to be in its best interests.

4.3. ORAL PRESENTATIONS MAY BE REQUIRED

AIRA may, after evaluating the written proposals, elect to schedule oral presentations of the finalists. Should oral presentations become necessary, AIRA will contact the top-scoring firm(s) from the written evaluation to schedule a date and time. Commitments made by the Consultant at the oral interview, if any, will be considered binding and part

of the proposal. Oral presentations will be recorded. Expenses incurred for participation in an oral presentation shall be at the expense of the Consultant.

4.4. NOTIFICATION TO PROPOSERS

AIRA will notify the Apparently Successful Contractor of their selection by e-mail upon completion of the evaluation process. Individuals or firms whose proposals were not selected for further negotiation or award will be notified separately by e-mail.

APPENDIX A

CERTIFICATIONS AND ASSURANCES

I/we make the following certifications and assurances as a required element of the proposal to which it is attached, understanding that the truthfulness of the facts affirmed here and the continuing compliance with these requirements are conditions precedent to the award or continuation of the related contract:

1. I/we declare that all answers and statements made in the proposal are true and correct.
2. The attached proposal is a firm offer for a period of 60 days following receipt, and it may be accepted by AIRA without further negotiation (except where obviously required by lack of certainty in key terms) at any time within the 60-day period.
3. I/we understand that AIRA will not reimburse me/us for any costs incurred in the preparation of this proposal and any subsequent oral presentations. All proposals become the property of AIRA, and I/we claim no proprietary right to the ideas, writings, items, or samples, unless so stated in this proposal.
4. I/we agree that submission of the attached proposal constitutes acceptance of the solicitation contents and the attached sample contract and general terms and conditions. If there are any exceptions to these terms, I/we have described those exceptions in detail on a page attached to this document.
5. No attempt has been made or will be made by the Proposer to induce any other person or firm to submit or not to submit a proposal for the purpose of restricting competition.
6. I/we grant AIRA the right to contact references and other, who may have pertinent information regarding the ability of the Consultant and the lead staff person to perform the services contemplated by this RFP.

We (circle one) **are / are not** submitting proposed Contract exceptions. (See Section 2.8, Contract and General Terms and Conditions.) If Contract exceptions are being submitted, I/we have attached them to this form.

On behalf of the Consultant submitting this proposal, my name below attests to the accuracy of the above statement. We are submitting a scanned signature of this form with our proposal.

Signature of Proposer

Date