REQUEST FOR PROPOSAL

#### The University of Texas Health Science Center at Houston

#### RFP No.: 744-R1504

#### Psychiatric Services Marketing Consultant

Bid Submittal Deadline: Thursday, November 13th, 2014 at 2PM CST

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Prepared By:

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Health Science Center at Houston

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October 14, 2014

Request for PROPOSAL

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##### SECTION 1

**INTRODUCTION**

* 1. **Description of University**

Founded in 1972, The University of Texas Health Science Center at Houston (UTHSC-H) is one of the fifteen component Universities of The University of Texas System. UTHSC-H is the most comprehensive academic health center in Texas, and is comprised of the following buildings & schools:

* Medical School (MSB) - 6431 Fannin Street
* Medical School Expansion (MSE) – 6431 Fannin Street
* Cyclotron Building (CYC) – 6431 Fannin Street
* Dental School (DBB) - 6516 M.D. Anderson Boulevard
* School of Public Health (SPH) - 1200 Pressler Street
* School of Nursing (SON) – 6901 Bertner Avenue
* School of Health Information Sciences (SHIS) - 7000 Fannin Street
* Graduate School of Biomedical Sciences (GSBS)– 6655 Travis Street
* Biomedical & Behavioral Sciences Building (BBS) – 1941 East Road
* Institute of Molecular Medicine (IMM) – 1825 Pressler Street
* Harris County Psychiatric Center (HCPC) - 2800 South MacGregor Drive
* Operations Center Building (OCB) -1851 Cross Point Avenue
* University Center Tower (UCT) - 7000 Fannin Street
* Professional Building (UTPB) - 6410 Fannin Street

UTHSC-H combines biomedical sciences, behavioral sciences, and the humanities to provide interdisciplinary activities essential to the definition of modern academic health science education. UTHSC-H is committed to providing health professional education and training for students, and is dedicated to providing excellence in research and patient care, which is offered through its clinics, Memorial Hermann Hospital System (its primary teaching hospital), Harris county Psychiatric Center (HCPC) and other affiliated institutions. UTHSC-H is a major part of the concentration of medical schools, hospitals and research facilities generally referred to as the Texas Medical Center.

The University of Texas Health Science Center at Houston System has nearly 4,500 employees and approximately 3,600 students. As a component of the University of Texas System, UTHSC-H is subject to the “Rules and Regulations of the Board of Regents of the University of Texas System for the government of The University of Texas System.”

**1.2 Background and Special Circumstances**

The UTHSC-H Department of Psychiatry (the department) is expanding its services with the addition of a refractory depression program which will include an electroconvulsive therapy (ECT) component. The department has also recently launched an inpatient pediatric bipolar program anticipates the addition of a geropsychiatric program within the next year. The department is seeking a marketing consultant to assist with the design and implementation of a sales and marketing campaign to educate the community and appropriate referral sources about these new services and to generate referrals to these new services.

**1.3 Objective of this Request for Proposal**

The University of Texas Health Science Center at Houston (“**University**”) is soliciting proposals in response to this Request for Proposal for Selection of a Vendor to Provide Consultant Services related to the design and implementation of a twelve week sales and marketing program to educate the public and referral sources about these new services offered by the department and to generate referrals to the programs The Services, which are more specifically described in **Section 5.4** (Scope of Work) of this RFP, include (1)strategy development (2) territory development (3) promotional development and (4) sales and marketing implementation.

**1.4 Group Purchase Authority**

Texas law authorizes institutions of higher education (defined by Section 61.003, *Education Code*) to use the group purchasing procurement method (ref. Sections 51.9335, 73.115, and 74.008, *Education Code*). Additional Texas institutions of higher education may therefore elect to enter into a contract with the successful Proposer under this RFP.

**SECTION 2**

**NOTICE TO PROPOSER**

**2.1 Submittal Deadline**

University will accept proposals submitted in response to this RFP until Thursday, November 13, 2014 at 2PM CST.

**2.2 University Contact Person**

Proposers will direct all questions or concerns regarding this RFP to the following University contact (“**University Contact**”):

Laura Lander  
UTHealth - Procurement Services

1851 Crosspoint, OCB1.160

Houston, TX 77054

Email: laura.lander@uth.tmc.edu

University specifically instructs all interested parties to restrict all contact and questions regarding this RFP to written communications forwarded to University Contact. University Contact must receive all questions or concerns no later than . University will have a reasonable amount of time to respond to questions or concerns. It is University’s intent to respond to all appropriate questions and concerns; however, University reserves the right to decline to respond to any question or concern.

**2.3 Criteria for Selection**

The successful Proposer, if any, selected by University in accordance with the requirements and specifications set forth in this RFP will be the Proposer that submits a proposal in response to this RFP on or before the Submittal Deadline that is the most advantageous to University. The successful Proposer is referred to as the “**Contractor**.”

Proposer is encouraged to propose terms and conditions offering the maximum benefit to University in terms of (1) services to University, (2) total overall cost to University, and (3) project management expertise. Proposers should describe all educational, state and local government discounts, as well as any other applicable discounts that may be available to University in a contract for the Services.

An evaluation team from University will evaluate proposals. The evaluation of proposals and the selection of Contractor will be based on the information provided by Proposer in its proposal. University may give consideration to additional information if University deems such information relevant.

The criteria to be considered by University in evaluating proposals and selecting Contractor, will be those factors listed below:  

* + 1. Scored Criteria

30% - the cost of the services

70% - the Proposer’s qualifications – based on answers to questions in Section 5.3:

(the reputation of the Proposer and of the Proposer’s services;  
 the quality of the Proposer’s goods or services;

the extent to which the goods/services meet the University’s needs;

the Proposer’s past relationship with the University;

the total long-term cost to the University of acquiring the Proposer’s goods/services.)

**2.4 Key Events Schedule**

Issuance of RFP October 14, 2014

Deadline for Questions/Concerns November 5, 2014 at 12PM CST

(ref. **Section 2.2** of this RFP)

Submittal Deadline November 13, 2014 at 2PM CST

**2.5 Historically Underutilized Businesses**

2.5.1 All agencies of the State of Texas are required to make a good faith effort to assist historically underutilized businesses (each a “**HUB**”) in receiving contract awards. The goal of the HUB program is to promote full and equal business opportunity for all businesses in contracting with state agencies. Pursuant to the HUB program, if under the terms of any agreement or contractual arrangement resulting from this RFP, Contractor subcontracts any of the Services, then Contractor must make a good faith effort to utilize HUBs certified by the Procurement and Support Services Division of the Texas Comptroller of Public Accounts. Proposals that fail to comply with the requirements contained in this Section 2.5 will constitute a material failure to comply with advertised specifications and will be rejected by University as non-responsive. Additionally, compliance with good faith effort guidelines is a condition precedent to awarding any agreement or contractual arrangement resulting from this RFP. Proposer acknowledges that, if selected by University, its obligation to make a good faith effort to utilize HUBs when subcontracting any of the Services will continue throughout the term of all agreements and contractual arrangements resulting from this RFP. Furthermore, any subcontracting of the Services by the Proposer is subject to review by University to ensure compliance with the HUB program.

2.5.2University has reviewed this RFP in accordance with Title 34, *Texas Administrative Code*, Section 20.14, and has determined that subcontracting opportunities are not probable under this RFP.

**SECTION 3**

**SUBMISSION OF PROPOSAL**

**3.1 Number of Copies**

Proposer must submit a total of five (5) complete and identical copies of its *entire* proposal and a complete and identical copy of its *entire* proposal on CD-ROM. An *original* signature by an authorized officer of Proposer must appear on the Execution of Offer (ref. **Section 2** of **APPENDIX ONE**) of at least one (1) copy of the submitted proposal. The copy of the Proposer’s proposal bearing an original signature should contain the mark “original” on the front cover of the proposal.

**3.2 Submission**

Proposals must be received by University on or before the Submittal Deadline (ref. **Section 2.1** of this RFP) and should be delivered to:

UTHealth

Procurement Services

1851 Crosspoint, OCB1.160

Houston, TX 77054

Attn: Laura Lander

**3.3 Proposal Validity Period**

Each proposal must state that it will remain valid for University’s acceptance for a minimum of One Hundred Twenty (120) days after the Submittal Deadline, to allow time for evaluation, selection, and any unforeseen delays.

**3.4 Terms and Conditions**

3.4.1 Proposer must comply with the requirements and specifications contained in this RFP, including the Agreement (ref. **APPENDIX TWO**), the Notice to Proposer (ref. **Section 2** of this RFP), Proposal Requirements (ref. **APPENDIX ONE**) and the Specifications and Additional Questions (ref. **Section 5** of this RFP). If there is a conflict among the provisions in this RFP, the provision requiring Proposer to supply the better quality or greater quantity of services will prevail, or if such conflict does not involve quality or quantity, then interpretation will be in the following order of precedence:

3.4.1.1. Specifications and Additional Questions (ref. **Section 5** of this RFP);

3.4.1.2. Agreement (ref. **APPENDIX TWO**);

3.4.1.3. Proposal Requirements (ref. **APPENDIX ONE**);

3.4.1.4. Notice to Proposers (ref. **Section 2** of this RFP).

**3.5 Submittal Checklist**

Proposer is instructed to complete, sign, and return the following documents as a part of its proposal. If Proposer fails to return each of the following items with its proposal, then University may reject the proposal:

3.5.1 Signed and Completed Execution of Offer (ref. **Section 2** of **APPENDIX ONE**)

3.5.2 Signed and Completed Pricing and Delivery Schedule (ref. **Section 6** of this RFP)

3.5.3 Responses to Proposer's General Questionnaire (ref. **Section 3** of **APPENDIX ONE**)

3.5.4 Signed and Completed Addenda Checklist (ref. Section 4 of **APPENDIX ONE**)

3.5.5 Responses to questions and requests for information in the Specifications and Additional Questions Section (ref. **Section 5** of this RFP)

3.5.6 Signed and completed originals of the HUB Subcontracting Plan or other applicable documents (ref. **Section 2.5** of this RFP and **APPENDIX THREE**).

3.5.7 Signed and completed W-9 Form.

3.5.8 Copy of Proposer’s tax certificate.

3.5.9 Copy of Proposer’s insurance certificate in accordance with limits stated in the attached Sample Agreement (ref. **APPENDIX TWO**).

**SECTION 4**

**GENERAL TERMS AND CONDITIONS**

The terms and conditions contained in the attached Agreement (ref. **APPENDIX TWO**) or, in the sole discretion of University, terms and conditions substantially similar to those contained in the Agreement, will constitute and govern any agreement that results from this RFP. If Proposer takes exception to any terms or conditions set forth in the Agreement, Proposer will submit a list of the exceptions as part of its proposal in accordance with **Section 5.3.1** of this RFP. Proposer’s exceptions will be reviewed by University and may result in disqualification of Proposer’s proposal as non-responsive to this RFP. If Proposer’s exceptions do not result in disqualification of Proposer’s proposal, then University may consider Proposer’s exceptions when University evaluates the Proposer’s proposal.

**SECTION 5**

**SPECIFICATIONS AND ADDITIONAL QUESTIONS**

**5.1 General**

The minimum requirements and the specifications for the Services, as well as certain requests for information to be provided by Proposer as part of its proposal, are set forth below. As indicated in **Section 2.3** of this RFP, the successful Proposer is referred to as the “**Contractor**.”

**5.2 Minimum Requirements**

Each Proposal must include information that clearly indicates that Proposer meets each of the following minimum qualification requirements:

5.2.1 Demonstrated experience providing direct sales to physicians and the medical community in general. Preference will be given to those with demonstrated experience providing sales to, and knowledge of, the psychiatric market in the Houston area.

5.2.2 Demonstrated experience in the development of a sales and marketing campaign including the creation of a competitor analysis, identifying and prioritizing referral targets and the creation of promotional messaging and key selling points.

5.2.3 Demonstrated experience in the design and creation of promotional materials.

5.2.4 Demonstrated success in providing follow-up communication to referring providers.

**5.3 Additional Questions Specific to this RFP**

Proposer must submit the following information as part of Proposer’s proposal:

* + 1. If Proposer takes exception to any terms or conditions set forth in the Agreement (ref. **APPENDIX TWO**), Proposer must submit a list of the exceptions.
    2. Describe your experience providing sales and marketing efforts to physicians and the medical community in general.
    3. Do you have experience with providing services similar to the scope of work in this RFP to the psychiatric market in the Houston area? If so, please describe.
    4. Describe your experience and successes in the creation and development of marketing materials.
    5. How was success measured in the above examples?
    6. Describe your experience in creating competitor analyses and generating the strategy for an overall sales and marketing campaign.
    7. Describe your approach to generating leads and referrals for a new service or treatment program.
    8. Provide some examples of marketing materials you have developed/designed.

**5.4 Scope of Work**

 Contractor will provide the following services to University:

Objective: Strategy Development

Deliverable 1: Marketing plan to create awareness of, and generate referrals to, the department’s new programs and services.

* Develop a competitor analysis for the targeted services. This analysis should include competitors’ capabilities, advantages in the market, volume and market share.
* Develop promotional messaging and key selling points for the HCPC Refractory Depression/ECT and the Pediatric Bipolar programs.

Objective: Territory Development

Deliverable 2: Marketing plan with territory assignments and referral targets.

* Defining a focused geography to cover in the Houston metropolitan area.
* Identifying and prioritizing appropriate referral targets.
* Segmenting targets by ECT utilization.
* Creating Influence and relationship maps for key accounts.
* Determine effective reach and frequency goals for the targets list.

Objective: Promotional Development

Deliverable 3: New promotional materials

* Assist UTHealth with the development of an overall design for promotional materials that will align with the UTHealth Graphic and Editorial Standards.
* Revise existing and develop new marketing collateral material as necessary.
* Design and implement direct mail marketing initiatives as necessary.

Objective: Sales and Marketing Implementation

Deliverable 4: New referrals to the ECT and Pediatric Bipolar programs

* Conduct effective visits on identified targets.
* Educate referral sources on the full range of care provided by the UTHealth Department of Psychiatry with an initial emphasis on ECT and the Pediatric Bi-Polar program.
* Secure referrals from newly-referring offices and sources.
* Provide follow-up communications to the referring providers.
* Conduct special marketing projects to increase customer engagement.
* Have regular contact with targeted customers.
* Conduct a needs analysis of targeted customers.
* Include appropriate UTHealth Psychiatry Faculty on as many visits to referral sources as possible.

**SECTION 6**

**PRICING AND DELIVERY SCHEDULE**

**Proposal of:**  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

(Proposer Company Name)

**To:** UTHealth

**Ref.:** Psychiatric Services Marketing Consultant

**RFP No.:**   744-R1504

Ladies and Gentlemen:

Having carefully examined all the specifications and requirements of this RFP and any attachments thereto, the undersigned proposes to furnish the services required pursuant to the above-referenced Request for Proposal upon the terms quoted below.

The University will not accept bids which include assumptions or exceptions to the work identified in the specifications and requirements.

**6.1 Pricing for Services Offered**

Deliverable 1 $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Deliverable 2 $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Deliverable 3 $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Deliverable 4 $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Travel and Reimburseables $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Total $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Please provide an hourly rate for future as-needed projects:

$\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ per hour

**6.2 Delivery Schedule of Events and Time Periods**

\_\_\_\_\_\_\_\_ Calendar Days to complete project after receipt of purchase order and executed contract.

**6.3 University’s Payment Terms**

University’s standard payment terms for services are “Net 30 days.” Proposer agrees that University will be entitled to withhold \_\_\_\_\_\_\_\_\_\_ percent (\_\_\_\_\_\_\_\_%) of the total payment due under the Agreement until after University’s acceptance of the final work product. Indicate below the prompt payment discount that Proposer will provide to University:

Prompt Payment Discount: \_\_\_\_\_%\_\_\_\_\_days/net 30 days.

Contractor understands and agrees that payments under the Agreement may be subject to the withholding requirements of Section 3402(t) of the Internal Revenue Code.

Respectfully submitted,

**Proposer:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**By:**  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

(Authorized Signature for Proposer)

**Name:**  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Title:**  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Date:**  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_