

The Central Oklahoma Transportation and Parking Authority

Request for Proposals

RFP-COTPA-25-008

Marketing Services



SPECIAL PROVISIONS

(Special Instructions and Scope of Services)

Special Provisions are deemed to be part of the Professional Services Agreement and shall supersede any conflicting term, requirement or condition in the Professional Services Agreement.

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The Opportunity

Project Summary

The Central Oklahoma Parking & Transit Authority (COPTA) dba EMBARK, is seeking proposals for a Marketing Services Provider to support our internal team. The Proposer(s) will provide strategic planning, consultation in creative, and media strategies to support EMBARK's marketing, advertising, and communication efforts.

Background

The Central Oklahoma Transportation & Parking Authority (COTPA), dba EMBARK, is the public transportation trust for the City of Oklahoma City. COTPA provides bus transit, paratransit, streetcar, bike share transit and ferry. COTPA currently manages four COTPA owned garages and three surface lots. COTPA's Board of Trustees are the governing body for the oversight of COTPA, downtown off-street public parking, and Oklahoma River Cruises.

Scope of Services

Description of Services

EMBARK anticipates a need for the following services, but are not limited to:

1. Strategic Planning

EMBARK is seeking strategic planning services defined by the Proposer's ability to analyze research, synthesize emerging trends and insights, understand our business and customers to provide critical thinking in the framework of a disciplined business and creative process. The Proposer will develop a strategic plan of action from insight to concept to creative development to implementation – ultimately, to achieve desired stated objectives. When directed, the Proposer shall participate with EMBARK to perform planning activities to support several efforts to include:

- **Research and Insights:** Provide industry trends, external driving factors, and customer behavioral insights to inform strategic direction and increase the knowledge base of EMBARK marketing and communications professionals. Act as an aggregator of research and advisor on the integration of critical insights.
- **Brand Positioning:** Enhance the perception of EMBARK's role as a mobility service provider in the communities EMBARK serves to increase ridership, customer satisfaction, and parking.
- **Choice Rider Marketing:** Development of marketing and communications platforms to increase ridership choice riders, served by EMBARK - and focus areas including race, gender, age, and lifestyle/occasions.

- ***Rider Tools Platform:*** Development of marketing and communications platforms to build awareness and increase usage of EMBARK travel and ticket purchasing apps; such as EMBARK Connect, Token Transit, Transit app, web trip planner, etc.
- ***Expansion/New Services, Products or Innovation Marketing:*** Development of marketing and communications platforms that promote awareness and build system value of innovative products and services such as EMBARK as a preferred employer, RAPID NW Service, MAPS4 improvements, and MAPS4 transportation services.
- ***Core Services:*** Development of marketing and communications platforms to promote awareness and increase ridership for EMBARK's transportation and mobility network or commercial opportunities to promote riding during selected periods; on selected routes, with specific communities or special events on Bus, Streetcar, Ferry, RAPID.
- Other strategies and COTPA initiatives that drive rider penetration and frequency.

2. Creative Advertising and Media Plan Development

EMBARK is seeking creative development services that address strategic opportunities and solve problems with creative that is unique, effective, and targeted as part of an integrated advertising and media plan. When directed, the Proposer shall participate with EMBARK to perform creative ~~and~~ advertising plan development activities to support several efforts to include:

- ***Advertising Concept Development:*** When directed by purchase orders, the Proposer shall be responsible for the development and execution of advertising concepts and precise creative executions against various initiatives.
- ***Media Consultation:*** When directed by purchase orders, the Proposer shall develop a coordinated media plan based on budget and timing provided by EMBARK and submit such plans for review. The Proposer shall recommend a mix of traditional and non-traditional advertising mediums and platforms based on the objectives as well as specific media outlets and placements based on the strategic plan.
- ***Digital Marketing and Social Media:*** When directed by purchase orders, the Proposer shall develop strategic digital marketing approaches utilizing social media, video advertising, influencer marketing, email, and SMS marketing. Plans need to deliver a return on ad spending based on objectives and programs directed by EMBARK.
- ***Promotions and Experiential Marketing:*** When directed by purchase orders, the Proposer shall be responsible for the development and execution of conceptualized promotions to existing EMBARK initiatives requiring creative efforts for tactical on the ground, event/activity-based efforts. Support may also include the development of promotional materials and premiums concepts, creation and

staffing of promotional experiential events, interactive promotions, joint promotions, or sponsorships.

- ***Video Consultation and Production:*** When directed by purchase orders, the Proposer shall develop video concepts and executions under the direction of EMARKS's Public Affairs department. These creative works will support the strategy and implementation of campaigns and communications platforms. In some instances, the Proposer will collaborate with EMBARK's Audiovisual team to develop and create video products for digital/social platforms as well as traditional mediums.

3. Managed Execution and Implementation

EMBARC is seeking services to manage project execution and implementation as defined by the ability to provide execution planning, management of allocated resources, and timely implementation against various initiatives. When directed, the Proposer shall participate with EMBARK to perform activities to support several efforts to include:

- ***Cooperative Promotions/Sponsorships:*** When directed by the purchase orders, the Proposer may be engaged in the development, planning, and execution of cooperative promotional programs and or sponsorships that involve ~~the~~ EMBARK and any of the following parties:
 - Outside merchants, businesses, non-profit organizations
 - Media
 - Corporate sponsors and or patrons
- ***Promotional Events/Activities:*** When directed by purchase orders, the Proposer may be engaged in the development, planning, and execution of promotional events to increase awareness, brand value, rider penetration, and or rider/parking frequency of use.
- ***Print, Collateral and Broadcast Production:*** When directed by purchase orders, the Proposer shall arrange and supervise the conversion of artwork (illustration, design, photography, audio visual graphics) and copy used to produce the finished advertisements directly/indirectly or through the use of multimedia/audio visual, product and design houses. Quality control of these processes is provided by the Proposer. In some instances, EMBARK will arrange for printing of point-of-purchase or collateral materials. In these cases, the Proposer may be required to provide quality control and press checks to ensure a correct final product.
- ***Benchmarking and Best Practice Sharing:*** The Proposer will incorporate routine updates and relaying of best practices and benchmarks in transit and related industries, but importantly within marketing and consumer markets with

transferable ideas. The Proposer will keep EMBARK aware and informed of new marketing tools and techniques and operate as an external arm of EMBARK Public Affairs. In some instances, the Proposer shall present marketing and consumer insights and promotions to third parties, during conferences or other industry events at EMBARK's direction.

4. Measurements and Reporting

Project measurements and reports to evaluate the performance of specific initiatives using agreed upon metrics. The Proposer is responsible for accurately collecting data to support the parameters and timely delivery of measurement reports. When directed, the Proposer shall participate with EMBARK to perform measurement and reporting activities to support several efforts to include:

- **Reporting:** The Proposer shall prepare routine reports that collect and analyze data and utilize the MarTech stack to provide fact-based intel on successful measures of stated goals and objectives. Reports should highlight activities for the preceding period(s), indicating all advertising programmed during the month, including at a minimum, the media, the description of the ad/creative material, medium utilized, media run dates, and status of assigned projects media and non-media projects. The report should show all Proposer services, and media run and plan for the fiscal year.
 - The Proposer shall provide bi-weekly status reports on the status of all marketing, advertising, and promotional projects.
 - The Proposer shall provide a monthly report due no later than the 15th day of each month on the status of all marketing, advertising, and promotional projects.
 - As part of each purchase order, as appropriate, the Proposer shall document each marketing/advertising/promotional program for the COTPA. Documentation will include sample materials, photos, a summary of all direct and media costs, and a written report of the strategies, deployment, and timing of the program as well as market reaction and results of metrics/measurement pre-determined before program launch.
- **Accounting:** The Proposer shall develop and maintain a method to accurately account for billings, to check the appearances of advertisements to ensure that ads appear as ordered and to maintain complete and accurate records of payments made to the various media, and to ensure that all invoices paid to suppliers are fairly and accurately priced. The Proposer shall not pass through any travel-related costs to EMBARK for business travel and associated expenses. Furthermore, the Proposer shall not bill EMBARK for accounting and billing meetings and reviews. EMBARK retains the right to conduct an audit of selected or all invoices and

backup affidavits, subcontractor invoices, and proof of performance for all media purchases, design, production, and other services performed by the Proposer.

- Non-Media – Monthly electronic submission of non-media backup. A backup will include the following: copies of all subcontractor’s invoices of the Proposer, corresponding approved purchase order, if applicable subcontractors PDF (backup) validating work performed, copies of vendor payments, MWBE vendor payment form, (if applicable), and internal timesheet reporting with supervisor’s signature.
- Media – Monthly electronic submission of media spreadsheet for reconciled buys, if they contain a variance to the original amount billed. The spreadsheet will include the original order billed to EMBARK, all corresponding affidavits, and explanation of debit/credit variance.

Minimum Qualifications and Expectations

EMBARK seeks a marketing services provider with proven experience managing and executing successful marketing campaigns in transit industries or similar. Proposer(s) must meet the minimum qualifications to have the expertise and resources to deliver high-quality, impactful marketing solutions.

(a) The Proposer shall have the capability to provide the critical thinking required to inspire, plan, develop, and execute marketing initiatives for the accomplishment of EMBARK’s strategic goals of increasing ridership, customer engagement and brand regard thereby benefitting the City of Oklahoma City by providing a sustainable system of innovative, affordable, reliable and safe mobility options for EMBARK riders/parkers that enhances the quality of life and stimulates economic development.

(b) The Proposer shall prepare, upon EMBARK’s request, materials, or campaigns for EMBARK’s services or programs, which EMBARK may initiate with a written fixed price project-based proposal during the contract terms. The execution of these initiatives will be performed within the parameters of the mutually agreed upon schedule listed in the task order.

1. History and Samples of Prior Successful Campaigns

- Demonstrated Experience: Provide a history of at least 3-5 successful marketing campaigns similar to this project, ideally with transit experience or relevant industry experience.
- Campaign Samples: Include work samples demonstrating the agency's ability to execute marketing strategies that align with EMBARK's goals. Campaigns showcasing measurable results, such as increased engagement, ridership, or public awareness, should be prioritized.

2. References

- Client References: Provide 3-5 references from clients who have undertaken projects similar to our requirements. At least two references should include detailed case studies highlighting marketing and advertising campaigns and corresponding measurable results.

- Case Studies: The case studies should clearly outline the challenges, objectives, strategies employed, and the campaign's quantifiable results (e.g., increases in engagement, conversions, or media impressions).

3. Creative Work Samples

- Portfolio of Work: Submit a portfolio that includes creative work samples from past campaigns, including but not limited to digital ads, print materials, video content, social media posts, signage, customer information, and other relevant marketing collateral.
- Variety of Work: Ensure the samples cover a range of creative executions, showcasing the proposer's ability to adapt messaging and design to diverse platforms and audiences.

4. Description of In-House Research Capabilities

- Research Approach: Provide a detailed description of your in-house research capabilities, including methods for market analysis, audience segmentation, and consumer behavior studies.
- Relevant Tools and Expertise: Describe the tools, software, and methodologies employed to gather insights and develop data-driven marketing strategies.

5. Description of Analytics Capability

- Measurement Tools: Detail the analytics tools and platforms utilized for measuring the success of marketing campaigns (e.g., Google Analytics, social media monitoring tools, CRM systems, etc.).
- Analytics Process: Explain your agency's approach to tracking campaign performance, interpreting data, and adjusting strategies to optimize results. Include how analytics guide creative decisions and media planning.

6. Timeline for Project Completion

- Project Phases and Timelines: Provide a clear and detailed timeline outlining the project phases, including formative research, message strategy development, creative execution, and media planning.

Realistic Milestones: Ensure the timeline includes specific milestones with completion dates for each phase.

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7. Capabilities in Formative Research, Strategy Development, Creative Development, and Media Planning

- Full-Service Capabilities: Describe your agency's capabilities in each of the key phases of the marketing process:
 - Formative Research: Approach to understanding target audiences, market trends, and industry dynamics.
 - Strategy Development: Explanation of your strategy development process, including setting objectives, defining goals, and aligning with client needs.
 - Creative Development: Outline how your agency generates creative concepts and messaging that resonate with target audiences.
 - Media Planning: Demonstrate expertise in media planning, emphasizing selecting the right channel mix for maximum impact.

8. Key Personnel and Organizational Structure

- Assigned Personnel: Identify the key personnel assigned to this project and their roles in executing the marketing campaign.
- Resumes and Experience: Provide resumes of the key team members directly involved in this contract, highlighting their relevant experience and expertise in similar projects.

- Organizational Chart: Submit an organizational chart of the team proposed for this contract, indicating reporting lines, roles, and responsibilities.

9. Sample Invoicing Process

- Invoicing Transparency: Provide a sample of your invoicing process that clearly outlines how pricing will be estimated and managed throughout the project.
- Tracking Hours and Budget: Explain how your agency tracks and reports hours worked and how you maintain transparency in billing to help manage and allocate budgets across multiple projects and initiatives.
- Cost Estimates and Budget Management: Demonstrate how you ensure the project stays within budget while maintaining quality and delivering on time. Include how you communicate any potential budget adjustments.

10. Additional Requirements

- Compliance and Legal Documentation: Provide any necessary documentation to demonstrate compliance with applicable regulations, including advertising standards, data privacy, and other legal requirements relevant to the project.
- Value Proposition: Explain why your agency is uniquely qualified to work with EMBARK, considering your experience, team expertise, and understanding of the project's specific needs.

By meeting these minimum qualifications and expectations, Proposer(s) will demonstrate that they possess the necessary experience, skills, and organizational capacity to execute the marketing campaign for EMBARK successfully.

Contract Payment

The Contracting Entity issues payment in accordance with the Professional Services Agreement. Proposer(s) should invoice the Contracting Entity at the email address that appears in the Notice to Proposers.

Proposal Instructions & Content

| TIMELINE | TIME (CT) & DATE | LOCATION / ADDITIONAL INFORMATION |
|---|------------------|--|
| Negotiation & Proposer(s) Selection | 5/1/2025 | <ul style="list-style-type: none"> • Selected Proposer(s) will be notified in writing. • Any award is contingent upon the successful negotiation of final Professional Services Agreement terms. If negotiations cannot be concluded successfully, the Contracting Entity reserves the right to negotiate a Professional Services Agreement with another Proposer or withdraw the RFP. • Negotiations shall be confidential and not subject to disclosure to competing Proposer(s) unless and until a Professional Services Agreement is reached. |
| Estimated Professional Services Agreement Execution | 6/5/2025 | <ul style="list-style-type: none"> • Subject to Contracting Entity approval. |
| | | |

The above dates are tentative and subject to change. The Proposal Release date, Pre-Proposal meeting, if applicable, Question-and-Answer period, and Proposal submission deadline are available to view on Bidnet Direct and the Notice to Proposers.

Proposal Content

Proposers are encouraged to use this table to ensure all components are included in their Proposal. Complete proposals will include the following:

| Proposal | |
|---|---|
| <input type="checkbox"/> | Cover Letter A simple letter of submittal. |
| <input type="checkbox"/> | Company History Describe historical background and track record of company. |
| <input type="checkbox"/> | Project Team Describe team that will be working on this project. Include contact information, titles, and office locations. |
| <input type="checkbox"/> | Technical Proposal Describe your company’s ability to perform the services as requested in the Minimum Qualifications and Expectations. |
| <input type="checkbox"/> | Customer References A minimum of 3 references are required. Provide references from other transit or similar industries, if possible. At least two references should include detailed case studies highlighting marketing and advertising campaigns and corresponding measurable results. |
| <input type="checkbox"/> | Campaign History A minimum of 3 successful marketing campaigns, ideally with transit experience or relevant industry experience. |
| <input type="checkbox"/> | Portfolio of Work Creative work samples from past campaigns, including but not limited to digital ads, print materials, video content, social media posts, signage, customer information, and other relevant marketing collateral. |
| <input type="checkbox"/> | Sample Invoice Provide a sample of your invoicing process that clearly outlines how pricing will be estimated and managed throughout the project. |
| <p>Additional Documents Upon Award: <i>Awarded Proposer(s) will be required to submit the following upon award. We encourage you to take note of these requirements. Please review sample documents in Bidnet Direct prior to proposal submission.</i></p> | |
| <input type="checkbox"/> | Professional Services Agreement |
| <input type="checkbox"/> | Acord Form |
| <input type="checkbox"/> | Letter of Authorization, if applicable |