



valley vision

Community Inspired Solutions

Request For Proposal

Sacramento Region Community Economic Resilience Fund
Lead Communications Partner

Valley Vision

PROPOSALS DUE BY: June 9, 2023

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RFP Overview

REQUEST FOR PROPOSAL: LEAD COMMUNICATIONS PARTNER

SUBMISSION DEADLINE: Friday, June 9, 2023

Questions, notices of intent to apply, and submissions may be submitted via email to:

RFP Contact Name: Valley Vision
Attn: Alana Ramsay
3400 3rd Ave,
Sacramento, CA 95817
Email Address: alana.ramsay@valleyvision.org
Phone: (O): (916) 325-1630
(C): (916) 350-0617

Valley Vision is seeking a Lead Communications Partner to develop branding, assets, a website, and a communications strategy for our Sacramento Region Community Economic Resilience Fund. The Lead Communications Partner will be responsible for leading a collaborative branding process that effectively communicates the values and goals of our region's CERF efforts. The Lead Communications Partner will be responsible for managing any subcontractors needed to complete this work, such as design agencies, translation services, etc. Products will be reviewed by a committee to ensure quality and accuracy.

Company Background

[Valley Vision](#) is a civic leadership organization dedicated to improving the livability of the Sacramento region. Through research and action, we collaborate on bold, long-term solutions that improve people's lives. Our work is guided by a triple-bottom line approach of equity, sustainability, and economic prosperity. Valley Vision is known for driving actionable research, building and managing diverse coalitions, advancing policy and education that supports triple bottom line values, and leading projects responsive to critical issues in the region, such as economic and workforce development, broadband access, food security/ food system resiliency, clean air and climate adaptation, land use planning, and more.

Project Background

COMMUNITY ECONOMIC RESILIENCE FUND ("CERF")

The [Community Economic Resilience Fund \(CERF\)](#) is a grant program administered by the State of California, dispersing \$600M in general funds to 13 regions across California for inclusive and regional economic development. The program seeks to build an equitable and sustainable economy as well as foster long-term economic resilience as the state transitions to a carbon-neutral economy.

Program Core Values and Goals

Equity - including those most in need in the decision-making and making sure outcomes are to their benefit

Job Quality & Access - creating high quality jobs and ensuring people have the skills and resources necessary to obtain them

Sustainability - preventing and mitigating increasing climate impacts

Economic Competitiveness & Diversification - making sure California continues to be a strong economic force both nationally and globally and thinking innovatively in order to do so

Economic Resilience & Recovery - continuing recovery efforts from recent economic shocks (i.e. recession, pandemic) while also planning for the future

CERF will be executed in two phases. The first phase is an eighteen month Planning Phase. Each of the 13 regions has received \$5 million in planning funds to establish a "High Road Transition Collaborative" (hereinafter referred to as "HRTC" or "Collaborative"). These collaboratives need to include a diverse group of stakeholders who will develop a regional economic plan and identify projects to support in the Implementation Phase. The creation and activity of these collaboratives are guided by a Regional Convenor and the \$5m fund is managed by the Fiscal Agent.

Valley Vision is the Regional Convenor and the Fiscal Agent for the [Sacramento region](#) which consists of the eight counties of Colusa, El Dorado, Nevada, Placer, Sacramento, Sutter, Yolo, and Yuba. This RFP is specific to the Sacramento region. This CERF region features diverse physical, geographic, cultural, and economic attributes. Landscapes range from the mountains of the Sierra Nevada to productive agricultural lands. Communities include small towns, suburbs, and an urban core that is home to the state Capital of California. The region is also a place of great cultural and racial diversity.

EXISTING TOOLS, PLATFORMS, AND SOFTWARE

Below is a list of the tools, platforms, and software Valley Vision currently uses in our everyday work and will also use throughout the duration of this project.

Document Creation & Retention	<ul style="list-style-type: none"> ● Microsoft Office Suite ● Google Drive ● Adobe Pro PDF ● Canva
Project Management	<ul style="list-style-type: none"> ● Monday.com ● Mavenlink
Virtual Meetings	<ul style="list-style-type: none"> ● Zoom ● Google Meet

<p>External Communications</p>	<ul style="list-style-type: none"> ● Wordpress (Website) ● Gmail ● Mailchimp ● Eventbrite ● Social Media <ul style="list-style-type: none"> ○ YouTube ○ Facebook ○ Twitter ○ Instagram ○ LinkedIn
<p>Survey Tools</p>	<ul style="list-style-type: none"> ● Doodle Poll ● SurveyMonkey ● Monday.com Forms ● Google Forms ● Mentimeter

Communications Project Information

Visions & Audience for Brand, Website, and Strategy

Branding Vision

The branding for this project should be representative of the program's three pillars: equity, high quality jobs, and sustainability; the Sacramento region; and the anchoring principle that this is a collective effort to increase the prosperity of our region.

Although our region is officially titled the Sacramento region under the CERF program, we want to make sure that our project name and branding reflects not just Sacramento County, but also the other seven counties.

Another known challenge is how to communicate the values and goals of the CERF program in a way that is simple enough for the general public to understand without losing important elements of what is a large and complex program.

The branding should be established through a collaborative process that includes members of the HRTC, whether by surveys, focus groups, or other methods.

Website Vision

Valley Vision also aims to create an engaging and accessible website for sharing information with both Collaborative members and the general public. “Accessible” in the context of this project is defined as:

1. The ability to support multiple languages

2. Navigable for those who may have visual impairments or physical limitations
3. Organized in a manner that is easily understood by those seeking information

The website should be able to stand on its own while still referencing Valley Vision’s role so that the work and collaboration of CERF can continue even after the two-year timeline has been completed.

Needed Features	Wanted Features
<ul style="list-style-type: none"> ● Embedded Contact Forms ● Past Events/Meetings Minutes & Agendas Library ● Taggable & Searchable Resource Inventory <ul style="list-style-type: none"> ○ Topic Area ○ Type of Resource ○ Language ● Embedded Google Calendar (Or Other Calendar) for managing upcoming meetings and events 	<ul style="list-style-type: none"> ● Filtered Member Directory <ul style="list-style-type: none"> ○ Logo ○ Name ○ County or Subregion ○ Stakeholder Type ○ Bio ○ Primary Contact Information ● Interactive Chart for Basic Data by County, even better if counties can be compared <ul style="list-style-type: none"> ○ Median Household Income ○ Demographics ○ Race/Ethnicity ○ Gender ○ Languages Spoken ○ Educational Attainment ○ Unemployment Rate ○ Poverty Rate

Website Deliverable	Example
Past Event Meeting Materials	CERF Project Webpage
Resource Inventory	Listos California
Member Directory	Impact Foundry
Interactive Chart	Flourish
County Comparison	County Health Rankings

Communication Strategy Vision

Last but not least, Valley Vision hopes to have a strategic partner that will help us successfully connect with our audience, leveraging the above-referenced branding and website tools. The strategy should include ways to best communicate with each segment of our audience for the purposes of keeping them informed and/or persuading them to engage in our planning efforts. Other materials such as press releases, talking points, etc. may be requested for creation in order to support the execution of the strategy.

Audience

1. **Collaborative Members** – Those who have joined our efforts and are representing organizations, companies, and communities of the following groups:
 - a. Labor organizations.
 - b. Employers, businesses, and business associations.
 - c. Grassroots and community-based organizations, community organizers, and community members.
 - d. Government agencies.
 - e. Economic development agencies.
 - f. Philanthropic organizations.
 - g. Education and training providers.
 - h. Workforce entities
 - i. Environmental justice organizations.
 - j. Worker centers.
 - k. Disinvested communities.
 - l. California Native American Tribes.
 - m. Other regional stakeholders capable of contributing to the success of the project.
2. **Elected Officials** – Federal, State, and Local elected officials who serve as representatives for the eight counties
3. **General Public** – Anyone who may have interest in our region’s CERF process, especially those who we have sought more information or participation through our community engagement and outreach. This also includes using public relations to leverage earned media in order to highlight successes and opportunities.

Please note that all of the above audience segments may contain individuals who speak English as a second language or do not speak English. Materials will need to be translated to Spanish and other languages as identified.

SCOPE OF SERVICES

The Lead Communications Partner will be responsible for the following services:

1. Brand Development & Asset Creation: Develop branding unique to our region while also remaining consistent with the state’s program guidelines. This includes project name, brand palette, logo, and templates.
2. Website Design: Design a website that will support transparency within the Collaborative and share information with external stakeholders according to their interest

3. **Strategy Development:** Develop a comprehensive communication strategy that outlines the objectives, methodology, timeline, and budget for effectively communicating the program to our audiences. The methodology should align with the program values of equity and inclusion.
4. **Strategy Execution Management:** In coordination with Valley Vision and the HRTC, managing the execution of the communication strategy and overseeing any subcontractors or other parties involved in the process. This includes attending regular meetings to discuss the progress of the project with Valley Vision and other members of the HRTC. It also includes cultivating stories and storytelling in the channels and methods determined.
5. **Evaluation & Reporting:** Conduct analysis and evaluation on the effectiveness of the communication strategy and prepare reports as necessary to Valley Vision and the HRTC.
6. **Review:** Submit deliverables to a review committee for quality assurance and accuracy.

COMMUNICATIONS DELIVERABLES

Deliverable	Phase	Description
Brand Development, Logo, & Style Guide	1	<p>Development of brand, possibly including:</p> <ul style="list-style-type: none"> - Project Name - Logos - Elevator Speech - Branded Assets such as powerpoints, Zoom backgrounds, etc. - Style Guide <p>Materials will need to be translated to Spanish and other languages as identified.</p>
Communication Strategy	1	<p>Engagement strategy and accompanying materials for interacting with the following stakeholders:</p> <ul style="list-style-type: none"> - External Community Members - Elected Officials - Collaborative Members <p>Materials will need to be translated to Spanish and other languages as identified.</p>
Host and Domain SetUp	2	Determine and set-up host and domain. Preferred hosting platform is WordPress.
Landing Page	2	Create a landing page with the new branding and basic program information.
Content Inclusion	3	Development of basic informational pages, meeting materials library, and contact forms.

Website Training 1	3	Training for the project team on how to upload content and materials, such as updating informational pages and uploading meeting materials.
Specialized Features Development	4	Development of an interactive data chart comparing basic county data and a comprehensive resource library to house reports, data tools, legislation, webinars, etc.
Website Training 2	4	Training for the project team on how to update Resource Library and Interactive Chart.
Website Maintenance & Assistance	5	Maintenance & assistance as needed.

SUBCONTRACTING

The Lead Research Partner may subcontract with other research entities as necessary to fulfill the scope of services. However, the lead research partner will be responsible for ensuring that the subcontractors meet the requirements outlined in this RFP.

ESTIMATED TIMELINE

Phases may overlap.

Notification of Intent	June 5, 2023
Proposals Due	June 9, 2023
Contract Award	No later than June 23, 2023
Phase 1 Deliverables <ul style="list-style-type: none"> • Brand Development, Logo, & Style Guide • Communication Strategy 	June 2023 - August 2023
Phase 2 Deliverables <ul style="list-style-type: none"> • Host, Domain, and Landing Page 	August 2023
Phase 3 Deliverables <ul style="list-style-type: none"> • Content Inclusion • Website Training 	August 2023 - September 2023
Phase 4 Deliverables <ul style="list-style-type: none"> • Specialized Features Development 	October 2023 - March 2024
Phase 5 Deliverables <ul style="list-style-type: none"> • Website Maintenance 	March 2024 - September 2024
Execution of Communications Strategy <ul style="list-style-type: none"> • Supporting Materials 	August 2023 - September 2024

Contract Ends

September 30, 2024

BUDGET CONSTRAINTS

Proposals should not exceed the maximum budget of \$400,000, including subcontractors. If the applicant proposes a budget that exceeds the suggested amount, describe the rationale for the excess budget. The competitiveness of the budget will be considered as part of the evaluation criteria.

CHANGE CONTROL PROCEDURE

Once under contract, changes to the Scope of Work may only be made with written approval from both the client (Valley Vision) and the service provider. Any changes that would increase the budget should also include a discussion with Valley Vision’s CFO, Creating Answers and Valley Vision’s COO, Alan Lange. The following representatives from each organization have power to approve SOW changes:

Valley Vision

- Evan Schmidt, CEO
- TBD, Project Leader

Lead Communications Partner

- TBD

SUBMISSION

NOTICE OF INTENT

If planning to submit a proposal, we request that the bidder submit a notice of intent to Alana Ramsay (alana.ramsay@valleyvision.org) by June 5, 2023 at 11:59 pm. Failure to submit a notice of intent will not be grounds for disqualification. However, Valley Vision reserves the right to provide flexibility on the submission deadline to bidders who do submit the notice.

PROPOSAL REQUIREMENTS

Please provide detailed information to accomplish the project scope outlined above. The budget and proposal must include all design, production, software acquisition, integration and necessary development and maintenance of the web site.

Proposals must address the following:

1. **Company Overview** – Tell us about your company and your experience in projects similar to ours. Provide links to your agency website, online portfolios, and social media.
2. **Team** – Identify the team who may work on this project. Include name, title/role, and brief background/experience of each.

3. **Project Approach** – Tell us about your proposed approach in terms of creative design strategy, methodology, plan, and other important aspects of the brand development & strategy process. The Project Approach should:
 - a. Show understanding of the CERF program and our audience, including cultural competence regarding the diverse communities in our region
 - b. Name any project management tools or processes for tracking and documenting project status. Please also mention any experience using Monday.com and/or willingness to use client’s existing software.
 - c. Include a plan for producing the deliverables stated in this RFP and any others the bidder deems necessary to create a comprehensive and effective brand, website, and communication strategy.
 - d. Provide details on the user training and support that may be provided for our content editors (i.e., onsite/in-person, live web, chat, email, phone-based, hard copy, other documentation, etc.).
4. **Subcontracting** – Provide brief information on any subcontractors the bidder plans to use, including their qualifications and experience. If the bidder does not have all anticipated subcontracts aligned, explain how you will identify and engage expert partners to fulfill the needed components.
5. **Solutions with Pricing** – Based on the elements included in the project approach, please include a line-item breakdown of costs. Total cost for your recommendations must come in under \$400,000. If the applicant proposes a budget that exceeds the suggested amount, describe the rationale for the excess budget.
6. **Quality of Work Samples & References** – Provide examples of similar projects the bidder has completed and the contact information for the client of each sample.

Proposals should be submitted to Valley Vision by Friday, June 9, 2023 by 11:59 p.m. and should be addressed to Alana Ramsay, Project Coordinator. Proposals should be submitted via email to alana.ramsay@valleyvision.org and include “Proposal for CERF Communications Partner” in the subject line.

PROPOSAL FORMAT

Please use font sizes no smaller than 10 pt. Proposals should be submitted in pdf format as one document and be no longer than 25 pages. If for any reason a proposal needs multiple documents, those documents should be compiled into a zip folder, labeled appropriately (i.e. “Exhibit [#] [Document Title]”) and referenced as such in the primary document.

Evaluation & Award

QUALIFICATIONS

The lead research partner should possess the following qualifications:

1. Experience: The Lead Communications Partner should have a proven track record of effective communications strategies and experience working with other programs funded by State or Federal grants is ideal.

2. Expertise: The Lead Communications Partner should have knowledge of the Sacramento region, our audiences, and the networks through which they can be reached.
3. Resources: The Lead Communications Partner should have the necessary resources to complete the project on time and within budget.
4. Staff (if applicable): The lead research partner should have qualified staff with relevant experience in the field.

SELECTION PROCESS

Proposals will be evaluated based on the following criteria:

1. Qualifications and Experience of the Lead Research Partner and Subcontractors (if available)
2. Proposed Approach for Conducting the Project
3. Quality of Work Samples & References
4. Availability and Resources
5. Budget and Cost

The internal review committee will review the proposals and select the Lead Communications Partner based on the evaluation criteria. The Lead Communications Partner will be notified of the selection within one month of the proposal submission deadline.

PROPOSAL AWARD EXPECTATIONS

Valley Vision shall award the contract to the proposal that best accommodates the various project requirements. Valley Vision reserves the right to award any contract prior to the proposal deadline stated within the "Estimated Timeline" or prior to the receipt of all proposals, award the contract to more than one bidder, and refuse any proposal or contract.