

**California Association for Local Economic Development
Communications Consultant**

REQUEST FOR PROPOSAL

Issue date: August 8, 2022

Closing date and time: August 19, 2022 by 5:00 pm

Contact person: Helen Schaubmayer, helen@caled.org

A: OVERVIEW

The California Association for Local Economic Development (CALED) is the premier statewide professional economic development organization dedicated to advancing its members' ability to achieve excellence in delivering economic development services to their communities and business clients. CALED's membership consists of public and private organizations and individuals involved in economic development: the business of creating and retaining jobs.

As a membership association, our communications with members and economic development stakeholders are a key component to our success. It is important that we have professional materials, distributed through effective vehicles, that efficiently convey the CALED message and the value of economic development.

General information regarding CALED can be found at www.caled.org.

This Request for Proposal is to select a qualified individual or firm to work with the CALED staff on marketing campaign goals to communicate and educate designated audiences on critical economic development messages and themes from CALED's Economic Development Recovery & Resiliency Playbook. The successful consultant will be an independent contractor and will provide services for a fixed fee.

B: SUBMISSION REQUIREMENTS

Confidentiality

A consultant receiving this RFP may not use, disclose, or duplicate it for any purpose other than to prepare a response. The consultant shall keep the Client's data confidential and shall not disclose its content to any other party, other than to those internal employees or agents responsible for preparing a submission, without the prior written approval of the Client. Receipt of this RFP does not entitle the consultant to associate its services with the Client in any way, nor represents in any way that the Client has employed or endorsed the consultant's services. Any such association or endorsement being contemplated by the consultant must receive the prior written approval of the Client. The Client will not disclose or share one consultant's response to this RFP with other consultants or other organizations.

The submission of a proposal indicates acceptance by the respondent of all of the conditions contained in this Request for Proposal unless clearly and specifically noted in the proposal submitted and confirmed in the formal contract between the Client and the consultant. Deviations from the Request for Proposal must be clearly identified in the written submission. Proposals are subject to a formal contract being negotiated, prepared and executed. The Client reserves the right to negotiate the terms and conditions of the contract.

All documents submitted by consultants shall become the property of the Client.

Proposal Schedule

All submissions must be received by 5:00 pm August 19, 2022. Submissions must not be directed to other Client employees. Clarification requests will be accepted by email.

Consultant Interviews

The Client reserves the right to interview the top scoring consultants to assist in their evaluation of the proposals. If interviews are conducted, they may be conducted in person, using internet conferencing technology, or through teleconferencing at the discretion of the Client.

Inquiries

Inquiries regarding this Request for Proposal are to be sent by e-mail to Helen Schaubmayer, Program Manager at:

helen@caled.org.

RFP Submissions

Consultants are required to submit their proposal via email clearly identified as **Proposal for CALED Communication Consultant** to: helen@caled.org

Proposals must be received at the above email by 5:00 p.m. **Friday, August 19, 2022** and must not be more than **8 pages**.

RFP Terms and Conditions

Proposals received later than the specified closing time will be rejected by the Client and returned without review.

Final acceptance of the proposal will be subject to the successful negotiation and execution of a written contract meeting the expenditure limits and required terms and conditions acceptable to the Client. The acceptance or rejection of any proposal will be made pursuant to the policies of the Client.

Rights Reserved by the Client

The Client is not liable for any costs incurred by interested parties in the preparation of their response to this Request for Proposal. Furthermore, the Client shall not be responsible for any liabilities, cost, loss or damage incurred, sustained or suffered by any interested party, prior or subsequent to, or by reason of the acceptance or nonacceptance by the Client of any response, or by reason of any delay in the acceptance of the response.

The Client reserves the right to request consultants provide additional information and address specific requirements not accurately or adequately covered in their initial submissions.

The Client reserves the right to modify any and all requirements stated in the Request for Proposal at any time prior to the possible awarding of a contract.

Conflict of Interest

The consultant agrees to be bound by the following requirements. Except as identified in the proposal or as specified in the contract, the consultant must certify in its proposal:

- That no person either natural or body corporate, other than the consultant, has or will have any interest or share in this proposal or in the proposed contract.
- There is no collusion or arrangement between the consultant and any other consultant(s) in connection with this project.
- The consultant has no knowledge of the contents of other proposals and has made no comparison of figures or agreement or arrangement, express or implied, with any other party in connection with the making of the proposal.
- Consultants chosen to participate in this RFP process shall disclose prior to entering into an agreement any potential conflict of interest. If such conflict does exist, the Client may at its discretion withhold the award of a contract from the consultant until the matter is resolved.
- Neither the consultant, nor any employee of the consultant, shall offer or receive any entertainment, gifts, gratuities, donations, discounts, fees, payment, commission, reward, special service, incentive, or other remuneration or compensation of any kind (“inducement”), regardless of value, related to this RFP. The consultant agrees to inform the Client immediately upon being offered any such inducement.
- Consultant warrants and represents that it is familiar with the provisions of Assembly Bill 5 (AB5) passed by the California legislature in September 2019 and understands they will meet the definition of an independent contractor.

The successful consultant shall continue to be bound by the foregoing prohibitions after the execution of a contract agreement.

The intent of this requirement is to ensure that each party is able to perform its duties and responsibilities free and clear of any actual or potential conflict of interest brought about by business or personal interest that might be in conflict with the best interest of the Client.

Future Agreement

There shall be no implied term that the lowest proposal will be accepted nor that if any proposal is accepted, that it will be accepted and a contract entered into on the exact terms submitted. The Client shall be free to accept a proposal, if a proposal is accepted, that it deems to be in the overall best interest of the Client and shall also be free to negotiate with any or all consultant's amendments to the prescribed work for any reason whatsoever, including, but not limited to, seeking cost savings or improvements to the final product as required or requested by the Client.

Notwithstanding that the Client retains the right to cancel the work; it is the intent of the Client to enter into a contract with the successful consultant to create and implement a marketing and education campaign to promote the value of economic development using themes and messages drawn from CALED's Economic Development Resiliency and Recovery Playbook.

Consultants agree to be bound by the terms and conditions of this RFP and to the services listed at the prices and rates quoted. If a contract is issued, the successful consultant will be bound by and comply with the terms and conditions contained in the contract and the RFP and any other terms or conditions negotiated by the parties which will constitute the full and complete agreement between the parties.

Budget

The budget for the designated scope of work for this education campaign is \$50,000 from the contract sign date through June 30, 2023.

C: PROPOSAL FORMAT

The Client is seeking proposals from consultants who are both interested and capable of undertaking the project. The onus is on the consultant to show their knowledge, understanding, and capacity to conduct the work outlined in this Request for Proposal.

The responses will be assessed according to how well they assure the Client of success in relation to the submission requirements. The detail and clarity of the written submission will be considered indicative of the consultant's expertise and competence.

Section 1: Overview

A narrative demonstrating the firm or individual's understanding of the full Scope of Project and services required by this Request for Proposals.

Section 2: Experience & Capability to Deliver

Demonstrate that the consultant has the qualifications, capability, capacity, and experience to provide the services required of this RFP.

Describe your experience as it relates to this project. Provide resumes for all members of the project team, firm, or individuals working on the project, clearly indicating experience, education, qualifications, and professional affiliations.

The successful consultant should have experience in developing and implementing marketing campaigns. Familiarity with economic development programs and industry language is highly desired.

Provide at least three references and/or samples of recent campaigns (including one specific to economic development), including a description of the project or affiliation as well as the client/reference name and contact information.

Section 3: Fee

Provide a fixed fee to complete all of the work noted in the RFP, which accounts for the inclusion of 20 flex hours to be used as needed to adapt to changes in the campaign strategy. Fixed price to include all labor, advertising costs, and other related expenses paid directly to the consultant.

Pricing should include a detailed summary of all fees and expenses with a breakdown of the cost of each element. Please indicate the total hours each project member will commit to the project and the hourly rate for each.

D: PROPOSAL EVALUATION

CALED will evaluate proposals and work with a committee to select the best candidate. By responding to this RFP consultants agree to accept the recommendation of the committee as to the successful consultant and acknowledge and agree that the Client makes the final decision.

The proposal will be evaluated against the following criteria:

Section 1: Overview 10 points

Section 2: Experience & Capability to deliver 30 points
Work Samples 15 points

Section 3: Fee 20 points

Total possible: 75 points

E: SCOPE OF WORK

- Weekly meetings with CALED staff for the first 6-8 weeks transitioning to monthly or as needed in implementation phase
- In coordination with Program Manager and other CALED staff as necessary, create and implement a marketing campaign to promote the value of economic development using messaging from the Economic Development Recovery and Resiliency Playbook—focus on sharing the subject matter expertise within the Playbook to help create support and influence for local economic development and CALED members
 - Create a year-long outreach campaign to share pieces of information at key intervals, based on what is happening in the environment and using text from the Playbook to support the message
- This work includes assessing and providing recommendations for the most effective platforms for our messaging. This includes reviewing our current communication vehicles noted below:
 - CALED Quarterly Journal—a 20-28 page print Journal sent to our membership four times a year; review current format and explore and advise on other potential formats or methods of delivery
 - Weekly CALED Alerts to Membership (Ed-Lerts)— review metrics and provide suggestions for improvement
 - CALED Social Media—review social media outreach vehicles and recommend (and implement as necessary) additional methods of communication
 - CALED Website Content—review in analysis and also on periodic basis to ensure messaging is consistent and advise on additions or updates as necessary