

Scope of Work

Task 1: Discovery

The Resilience Program's work is wide-ranging and interconnected. Since the program's inception, various communication tools including project one-pagers and visioning documents have been developed for the purpose of publicizing the program to clients, stakeholders, and the general public. ABAG would now like to develop a comprehensive communication strategy.

The Consultant will familiarize themselves with the program materials and staff in order to gain a thorough understanding of the Resilience Programs' services, methodology, goals, vision, and project history as a basis for all future work including developing the program narrative and brand, print materials, and web design and development. Discovery should also include a basic understanding of ABAG as an agency, including how the Resilience Program fits in with ABAG's other departments and programs.

Task Components

1. Review ABAG website (abag.ca.gov)
2. An initial kickoff meeting with Resilience Program staff to determine goals of developing the Resilience Program story and identity, the needs of the project materials, and familiarize the Consultant with the work of the program.
3. Document review of previously developed program and project materials (to be provided by staff at initial kickoff meeting). *(ABAG to develop specific list of materials, can provide links online, and possibly attachments that contain additional materials)*

Task 2: Project Approach

After conducting the discovery and acquainting themselves with the Resilience Program content and culture, the Consultant will work with Program staff to develop a project approach plan that details how tasks will be accomplished within the not-to-exceed budget. The consultant may develop a project approach that includes feasible tasks within this current budget and potential tasks for a next phase. The project approach should also include a feasible timeline that outlines key check-in meetings and deliverable dates reflective of the consultant's capacity, the Program staff's needs, and dependencies inherent in the scope of work.

Task Components

1. Develop an initial project approach that reflects the consultant's best estimate of feasibility of the tasks outlined in this scope of work within the not-to-exceed budget
2. Hold 1-2 meetings with Program staff to negotiate final scope of work, project approach, and project timeline
3. Develop a final project approach

Task Deliverables

1. Written project approach that outlines the final scope of work, how tasks will be achieved, project timeline, and final budget. This may also include potential tasks

(either outlined here or developed in conjunction with Program staff during meetings) for a future phase of the project.

Task 3: Program “Story” and brand

The Consultant will develop three interconnected narratives that embody the Resilience Program’s work. The three narratives include describing and summarizing the program’s overall work; individual narratives about specific *projects*; and narratives about how the program interprets and addresses specific *topic areas*. The goal of this task is to identify and develop each narrative, as well as to recommend collateral that staff can use to easily and clearly tell the story(s) to potential funders, partners, other stakeholders, and audiences such as jurisdictions or the general public.

The narrative(s) may be used to market the program for multiple purposes, including, but not limited to: to obtain future grant funding; to increase the confidence of current funders as to the value of the program; to generate and spread a “culture of resilience” based on the program’s vision to increase resilience-related actions in the Bay Area; to clearly articulate to jurisdictions the services and value that the Program can provide to them; and to convey basic resilience information and increase the confidence of the general public about hazards information.

Program Narrative

With a comprehensive understanding of the Resilience Program’s services, methodology, goals, vision, and project history, develop a simple and cohesive narrative for the program that can be easily communicated verbally and visually. The “story” of the Resilience Program should contain, at a minimum: a comprehensive picture of our vision of resilience that underlies our approach to all of our projects; our history and how it relates to our current approach, including how projects have built upon each other to inform current direction; our areas of focus and expertise, including why we focus on these areas; the types of services we offer, for example linking academic research to public policy or providing technical support to jurisdictions; the types of products we offer jurisdictions and the general public, including, but not limited to maps, quizzes, how-to guides, reports, etc.; and the program’s context within both the Planning Department and ABAG, including relationships to other ABAG products such as Plan Bay Area.

Project Narratives

The Resilience Program has developed many innovative projects over the years. The projects are used to illustrate case studies, convey facts and findings, develop policy platforms, develop strategies for addressing risks and vulnerabilities, and provide tangible written and graphic materials to jurisdictions and the general public. The Consultant will develop a strategy to effectively capture the essence of a project and make recommendations for collateral to convey project findings and recommendations. Consultant should familiarize themselves with multiple projects to determine a standard approach to communicating projects.

Topic Area Narratives

The Resilience Program has developed expertise, policy positions, and methodological approaches to address certain topic areas under the umbrella of resilience. The Consultant will

craft a story specifically around the topic area of housing, which is one of the programs longest-standing focus areas. The narrative may include the program's approach to interpreting engineering information on housing fragility, translating hazard maps into housing risk, estimating housing loss in a major disaster, and recommended best practices for housing retrofit. The final narrative should tie together existing housing materials with new, consultant-developed materials that support better decision-making for jurisdictions and homeowners around safer housing. The narrative approach may be replicable for other topic areas. Additionally, other topic areas may be optional add-on to this contract, or future contracts, depending on future funding.

Task 3 includes the development of text and summary graphics that efficiently convey each of the narratives. This deliverable should be formatted such that program staff can utilize the materials in a variety configurations; this deliverable does NOT include final, print-ready materials. However, the Consultant should also develop recommendations for additional print and web-based collateral that best communicates the narratives to multiple audiences and in multiple formats. These materials will be developed in Tasks 4, 5, and 6.

Collateral recommendations may include additional graphics, icons, and/or text, in the form of (but not limited to) brochures, leaflets, posters, postcards, web pages, presentation slides, and/or white papers, as appropriate. Web-based recommendations should fit within the program's existing website structure; however, suggestions for website improvements are welcome as a website restructuring and redesign is planned for the near future.

Clarify in description and components/deliverables (text for deliverables below) the difference between "mother" graphics and graphics for specific deliverables.

Task Components

1. Develop an initial outline that clearly articulates the visual and verbal narrative of the Resilience Program, projects, and housing topic area, including recommendations for collateral will be most effective for staff to use to tell the story and market the program (to be developed in Tasks 4, 5, and 6)
2. Hold 2-3 meetings/charrettes with Program staff and/or stakeholders to receive feedback and refine initial program, project, and housing outline
3. Develop final text and graphics that can be used in a variety of program materials
4. Develop final recommendations for collateral to tell the story of the program, projects, and housing topic area (to be developed in Tasks 4, 5, and 6)

Deliverables

1. Written text that tells the story of the Resilience Program, projects, and housing topic area that can be utilized in a variety of ways by the consultant and/or program staff for various marketing and/or project materials
2. Full color supporting graphics that supplement and/or summarize text that can be utilized in a variety of ways for various marketing and/or project materials
3. Outline with recommended collateral that utilize text and graphics developed in this task to comprehensively tell the story of the Resilience Program, projects, and/or housing topic area (to be developed in Tasks 4, 5, and 6 below)

Task 4: Print Materials

The program requires two types of print materials: collateral to support recommendations and narrative developed in Task 3, and specific project deliverables.

Based on the program's specific deliverable requirements and the outline developed in Task 3, design aesthetically pleasing designs for printed materials. The Consultant will develop layout of materials with consistent design throughout all products, including typography, color, and layout. The Consultant, in collaboration with program staff, will generate all content based on the text and graphics developed in Task 3.

The program also has identified two specific project deliverables that the Consultant will develop. First, design an aesthetically pleasing, easy-to-use print version of a quiz used by residents to self-assess the safety of their housing. The web version of this quiz will be developed in Task 6. Program staff will provide content, but the consultant may develop additional content, including text and/or graphics, to strengthen the material. Second, design a Housing Field Guide that provides an aesthetically pleasing, clear, and easily understandable brochure/booklet that provides users with information on how to identify common fragile housing types in the Bay Area. Program staff will provide content, but the consultant may develop additional content, including text and/or graphics, to strengthen the material. Both of these specific products should fit into and support the comprehensive housing topic area narrative developed in Task 3.

Other specific deliverables may be identified, as needs and costs allow. All print materials should consider the feasibility and ease of future printing.

Task Components

1. Design draft program and project print collateral based on outline in Task 3
2. Working with program staff, review and refine program and project print collateral
3. Complete program and project print collateral
4. Develop guidance for adapting material files, including a style sheet that outlines fonts, colors, text sizes, layout, etc., for staff to use for future materials. This may include templates.
5. Design a draft housing quiz print version
6. Working with program staff, review and refine housing quiz print version
7. Complete the housing quiz print design
8. Develop a draft Housing Field Guide
9. Working with program staff, review and refine Housing Field Guide
10. Complete the Housing Field Guide

Deliverables

1. Electronic files of all program and project marketing materials in a format compatible with software program staff can use
2. Written guidance on program and project marketing materials specifications and printing
3. Written guidance for adapting program and project marketing material files for use for future materials, including a style sheet and templates, if appropriate

4. Electronic file containing Housing Field Guide in a format compatible with software program staff can use
5. Written guidance on Housing Field Guide specifications and printing
6. Electronic file containing housing quiz print version in a format compatible with software program staff can use
7. Written guidance on housing quiz print version specifications and printing

Task 5: Web Design and User Experience (EQ maps/housing)

Develop a comprehensive web-based user experience that supports the housing topic area narrative and includes a logical and compelling path to allow users to walk through the steps of identifying hazards, using specific tools such as the housing quiz to identify their housing risk, and identify next steps to address housing risk via the program's website. Part of this user experience includes the link between existing hazards maps hosted on ABAG's GIS portal website. User experience may include multiple paths to access materials, based on user needs.

Consultant will design user experience(s) and develop recommended page layouts, typography, and colors for new web pages, or modifications to existing web pages. All new or modified pages should present a consistent design and be compatible with the existing WordPress website. It is expected that program staff will build and maintain this web content on our current WordPress website. The Consultant should also provide guidance on improvements to the existing GIS portal to streamline the user experience, and also note and make suggestions for additional clarification or streamlining of the program website as a whole that could better support the housing topic area narrative. Any additional tasks identified may be added to this or future contracts as funding is available.

Web-based products should be visually appealing, easy to navigate, and consistent with the format of the existing website.

Task Components

1. Develop draft user experience(s) for housing topic area (including hazard maps to identify housing vulnerability), including progression of pages, and design templates for new pages and/or modifications of existing pages
2. Working with program staff, review and refine user experience and page layouts
3. Test the user design experience through a focus group (ABAG will convene, consultant needs to lead the focus group and incorporate results into final product)
4. Complete user design and page layouts
5. Staff support for webpage development (if needed and if budget allows)

Deliverables

1. Storyboard that outlines user design experience(s)
2. Electronic files containing webpage design for each new or modified webpage that includes layout, fonts, colors, including a CSS style sheet
3. Text document outlining general guidance for coding of new pages, to be utilized by project staff

Task 6: Web Design and Development (housing quiz, resilience dashboard)

Design and develop two stand-alone WordPress-based web page(s): an online version of the housing quiz discussed in Task 4 (which outlines the print version of the quiz) and a “resilience dashboard” that provides an intuitive and aesthetically pleasing interface for users to access information about local resilience policies and actions. The content for both web pages will be provided by program staff. Both products, but especially the housing quiz, should be consistent and integrated into the housing topic area “story” and web pages designed in Task 5.

All web pages should present a consistent design and be compatible with the existing WordPress website and those web pages designed in Task 5. Web pages should be designed to be maintained by program staff. Web-based products should be visually appealing, easy to navigate, and consistent with the format of the existing website.

Depending on funding availability, additional pages may be added to this, or a future contract, as necessary.

Task Components

1. Design an online housing quiz that is visually appealing and provides an intuitive and logical user experience (content will be provided by program staff)
2. Based on feedback, re-design and refine online housing quiz
3. Complete the design for housing quiz
4. Build the housing quiz web page(s)
5. Design a “resilience dashboard” that is visually appealing and provides an intuitive and logical user experience (content will be provided by program staff)
6. Based on feedback, re-design and refine resilience dashboard
7. Complete the design for resilience dashboard
8. Build the resilience dashboard web page(s)

Deliverables

1. Web pages that provide users with an intuitive and educational experience to access a housing quiz and a “resilience dashboard.”
2. Electronic files for website, including graphics and stylesheet.
3. Written guidance documentation for web page maintenance and updates.

Task 7: Marketing Strategy

Identify a marketing strategy and tools for the Resilience Program, using materials developed in previous tasks, to continue to develop and improve the reputation of the Resilience Program. Goals for marketing may include, but are not limited to: improve public awareness of resilience issues; improve the culture of resilience in the Bay Area amongst elected officials, department heads, and staff at jurisdictions; attract grant funding and support; improve partnerships with key stakeholders; identify new partnerships and areas of focus for the program; consider how to develop relationships and cultivate resilience culture statewide and nationwide. Components of this task may include identifying additional stakeholders, identifying critical existing relationships, implementation plans for disseminating newly-developed materials from Tasks 1-6, and identifying a 1-2 year strategy for marketing and outreach. ABAG may expand or continue the scope of this task in this or future contracts, as funding is available.

Deliverables

1. A marketing, engagement, and outreach strategy document for staff to utilize to expand and improve the reach of the Resilience Program, using materials developed elsewhere in this scope. This should include a timeline and specific stakeholders and audiences for engagement.

Project Schedule

Task	May 2016	Jun 2016	Jul 2016	Aug 2016	Sep 2016	Oct 2016	Nov 2016	Dec 2016	Jan 2017	Feb 2017	Mar 2017	Apr 2017	May 2017	Jun 2017	Jul 2017	Aug 2017	Sep 2017
Task 1: Discovery																	
Task 2: Program “Story” and brand																	
Task 3: Print Materials																	
Task 4: Web Design and User Experience (EQ maps/housing)																	
Task 5: Web Design and Development (housing quiz, resilience dashboard)																	
Task 6: Marketing Strategy																	