

April 6, 2015

## REQUEST FOR PROPOSALS

You are invited to submit a proposal to provide assistance to the San Francisco Estuary Partnership (SFEP) for implementation of the Comprehensive Conservation and Management Plan (CCMP) by providing public and media consulting services as outlined in this RFP. **Electronic proposals are due in the SFEP offices no later than Monday, April 27, 2015 at the close of business, 5: 00 P.M.**

Under a cooperative agreement with the Environmental Protection Agency, the Association of Bay Area Governments (ABAG) provides communication, technical and administrative support for the San Francisco Estuary Partnership. Any contract resulting from this solicitation will be negotiated by ABAG and SFEP and administered by ABAG/SFEP. Funding for this effort comes from the U.S. Environmental Protection Agency and the State Water Resources Control Board. Any contract negotiated for these services will comply with state and federal grant requirements and standards.

### **Background**

San Francisco Estuary Partnership staff is leading an effort to update the landmark Comprehensive Conservation and Management Plan [CCMP]. First approved in 1993, the Plan has resulted in numerous projects and programs that have improved the health of the estuary. Work now underway will create a new plan that looks forward to 2050, takes into consideration new ideas and conditions, and emphasizes issues not deeply addressed in past versions, such as the expected impacts of climate change and population increase on the region.

Development of the new plan has been underway for a year, guided by the Partnership's Implementation Committee, a CCMP Steering Committee, and three content-oriented Subcommittees. The new plan is being crafted using a strategic process and will result in a set of priority actions. Along with new actions, it will describe how the Partnership will measure and track progress on those actions, and be grounded on the *2011 State of the Bay Report* and other important chronicles of estuary health.

A draft of the revised CCMP is scheduled for release in September of 2015, concurrent with the State of the Estuary Conference to be held September 16-17. The final revised CCMP is scheduled for release by April 30, 2016.

Additional information about the CCMP revision process can be found at the public webpage: <http://www.sfestuary.org/ccmp-revision/>.

In addition, staff has created a webpage specifically for the Subcommittee members that includes additional background information, as well as links to meeting materials: <http://www.sfestuary.org/ccmprevisionsubcommitteeresources/>.

### **Outreach Goals.**

The CCMP is not a regulatory document and there is no legally-required public process for the revision. However, success of the CCMP relies on the collaborative effort of the region to develop and implement actions. Staff has been working with the Subcommittees to develop goals, objectives and actions and has also started conversations with many organizations, agencies, and individuals we need involved in this critical work. To ensure success of the final revised CCMP, continued and extended outreach and involvement in developing this plan and cultivating ownership among partners to implement CCMP actions is vital.

There are several distinct audiences that must be reached in order for the new CCMP to be both developed in a way that will engage the people who will need to implement the actions and to inform the broader stakeholder community that has an interest in the actions of the CCMP even if not as part of the set of implementing entities.

One audience is the senior management and upper level staff of the state, federal and local agencies who will take ownership of specific actions. This audience includes agencies within CAL EPA, Resources, State Lands, the Delta-related agencies and others. On the federal side, the US EPA, Fish and Wildlife Service, NOAA, the Corps of Engineers and others will be key. At the local level, the cities and counties that make up the greater Bay Area are the primary target for outreach. As SFEP sits within the ABAG organization we envision that ABAG's leadership and committees will be key to this audience. In addition, there are many nonprofit organizations and public citizens who work to increase the health of the Estuary. Finally, it is also important for those who may be affected by implementation of the actions in the CCMP (such as industry and business entities) to be well-informed of the process and product.

The goal for this effort is to increase stakeholder and public awareness about the Comprehensive Conservation and Management Plan update process and its purpose as measured by feedback through social media and workshop responses. Work will consist of assisting SFEP in assessing needs, and creating and deploying methods and materials that help interested parties stay informed and have input and influence into the CCMP update process.

### **Services Required**

Contractor will provide the following services:

- 1) Develop an Outreach Plan to cover the CCMP update work until completion. Development of the Outreach Plan shall include reviewing mediums of communication currently being employed by SFEP related to the CCMP update including website, written materials, and social media, and developing specific

recommendations on how to improve the use of those tools to enhance stakeholder input and information sharing at the various steps of the revision process.

- 2) In accordance with the elements of the completed Outreach Plan, design and implement new communications and outreach informational materials and programs via various mediums so that our stakeholder community can learn more about the project to revise the CCMP and to communicate ideas back to SFEP.
- 3) Develop a variety of outreach media [including electronic and social media] to educate our stakeholders and keep them informed on the progress of the CCMP update and provide efficient ways for them to participate in the development of actions.
- 4) In accordance with the elements of the completed Outreach Plan, plan and conduct educational presentations and events for the Partnership to solicit input on the CCMP update to our stakeholder community, with a special goal of achieving strong input from our diverse state, regional and local stakeholder communities. This work will include, in cooperation with SFEP staff, identifying key stakeholder groups, developing key message pieces, reserving space for any necessary meetings, material and agenda development, staffing of the events and necessary follow-up.
- 5) Develop a Media Plan regarding the rollout of the Draft and Final CCMP; assist SFEP with media roll out.

**Task and Time Frame Details**

This is a one year contract with four options to renew for an additional year. ABAG/SFEP has the sole right to exercise each option at its discretion and availability of funds.

TASK	Details	TIMELINE/DELIVERABLE	BUDGET
1. Review current communications and draft a CCMP Outreach & Media Plan	Plan will lay out events, materials, media outreach actions, and timeline deemed necessary for successful draft Plan review and engagement by targeted stakeholders.	First Draft May 2015. Final recommendations June 15 <sup>th</sup> .	\$5,000
2. Design new materials* per plan recommendations	This may include written materials, such as fact sheets, news articles, tweet texts, facebook memes, etc.	May-July; materials developed and deployed as needed throughout contract and defined in the Outreach Plan	\$5,500
3. Develop multiple outreach media per plan	Newsletter, FB, twitter, email communications, State of the Estuary program element	June-August As needed throughout contract and defined in the Outreach Plan	\$5,500
4. Conduct outreach	Targeting key audiences,	July-December As	\$6,000

events	event planning, agenda development, notification, staffing meetings. These might range from small meeting with key agency staff to meetings with 100+	determined by consultant and staff throughout contract and defined in the Outreach Plan	
5. Media Rollout	This may include written materials, draft op-eds, press releases, meeting agendas	July 2015-March 2016 Strategy August 2015, roll out September 2015-March 2016	\$6,000

\* Written materials to be printed by SFEP

**Compensation**

Up to \$28,000 is available for this work this year. The Contractor must be an independent contractor. No benefits are provided. Contractor is responsible for payment of applicable state and federal taxes. Contractor must provide the necessary equipment to perform required work.

**Selection Procedure**

Every proposal will be evaluated according to the criteria below. Numerical scores will be tabulated for each offer. Qualifications and experience as a whole are more important than cost.

1) Qualifications and Experience - The Contractor will be evaluated based on the level of experience and background in performance of similar projects/programs. Qualifications should include the following:

- a) Contractor must have proven track record in public outreach and media events.
- b) Contractor must have extensive and proven track record of working with environmental organizations to expand their communications programs, including helping those organizations to refine key messages and develop innovative distribution systems for those messages as well as helping those organizations maximize existing communications methods.
- c) Contractor must have extensive experience developing traditional and new media materials that assist in gaining input from targeted communities and making the material easy to comprehend by the general public.

2) Proposal - The Contractor will be evaluated based on the adequacy of the submitted approach to fulfill the goal and objectives of this Request for Proposal (RFP).

3) Other Factors - Several additional factors will be considered in the RFP selection process

including:

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- Proposals must respond to all the requirements of the RFP, and must include all information specifically required in all sections of the RFP.
- Award of contract may not be made to any Contractor unless an agreement can be secured for all general and special contract provisions.
- Award will not be made to a Contractor whose proposed period of performance is not within a period of time acceptable to the SFEP.

Proposers which have been certified by a Federal, State or local government entity or agency should so indicate in their proposal, including the certifying entity or agency. Highest ranking candidates may be invited to an interview at the San Francisco Estuary Project Offices, San Francisco Bay Regional Water Quality Control Board, 1515 Clay Street, Suite 1400, Oakland, CA, at their own expense.

### **Contract Award**

Contract award shall be made to the responsible Contractor whose proposal is most advantageous to ABAG and the Estuary Partnership, evaluation factors, costs, and other factors, considered. Our objective is to obtain the highest qualified contractor to achieve the objectives within a realistic time frame and reasonable cost.

This RFP does not commit ABAG to award a contract. We reserve the right to reject any or all proposals received in response to this request. The Applicant is informed that the award of any contract as the result of this solicitation is contingent upon the availability of federal funds.

### **Applications**

We invite individuals and organizations to work with us. The contract funded by this RFP is expected to start April 15, 2015.

### **What to Submit**

To provide an objective, fair review of all proposals, the submittals are to include only the following information:

- 1) Transmittal Letter - Normal transmittal letter, covering highlights and unique features of your proposal. Any special terms and conditions of the offer should also be summarized in this portion of the proposal. Letter should include your office address.  
Length: **One (1) page maximum.**
- 2) Statement of Work - Provide a definitive proposal to accomplish the requirements as stated in this RFP. This must describe in detail the procedures and methods that

will be used to achieve the stated goals of the project, preferably drawing on past experience/ work conducted by the applicant. A proposed timeline and clear delineation of general tasks, products, and expected completion dates must also be included.

Length: **Two (2) pages maximum.**

- 3) Relevant Experiences - Provide a summary of relevant experience over the last 5 years. Also provide resume(s) for key staff.

Length: **Two (2) page maximum.**

- 4) List of Client References - Provide a list of clients to be used as references for your work, including contact name, address, telephone number, nature of job, length of engagement, amount (e.g. 1 year, \$ 10,000).

Length: **One (1) page maximum.**

- 5) Budget - Must include amount budgeted per task and total funds requested. Provide hourly billing rates and estimated hours per task for all personnel and any subcontractors, including overhead cost.

Length: **One (1) page maximum.**

- 6) Examples of Work - Provide one or two examples of work (citing web sites is acceptable) that clearly demonstrate your ability.

We require an electronic copy of your proposal package. **Proposals are due in the SFEP offices no later than Monday, April 27, 2015 at the close of business, 5:00 P.M.** Questions may be directed to Caitlin Sweeney at (510) 622-2362; e-mail at [caitlin.sweeney@waterboards.ca.gov](mailto:caitlin.sweeney@waterboards.ca.gov)

Proposal should be addressed to Paula Trigueros at [paula.trigueros@waterboards.ca.gov](mailto:paula.trigueros@waterboards.ca.gov)