



REQUEST FOR PROPOSALS

#RFP-2024-09

PROJECT: PUBLIC RELATIONS AND MARKETING COMMUNICATIONS SERVICES

The Authority is issuing this Request for Proposals for expertise and on demand consulting services related to public relations and marketing communications services.

**PROPOSALS DUE: FRIDAY, NOVEMBER 15,
2024, by 5:00 PM PACIFIC STANDARD
TIME**

Request for Proposals

Public Relations and Marketing Communications Services

BACKGROUND & SCOPE OF WORK

PURPOSE OF REQUEST FOR PROPOSALS

The Santa Clara Valley Open Space Authority (Authority) is soliciting proposals from qualified consultants with expertise in telling compelling stories, connecting with audiences, creating digital and printed public education materials and strategy development for reputation management, crisis avoidance and management, public relations and media relations, speech writing and development of internal communications and speaking points, market research, ad purchasing, copywriting, outreach, media training, and influencer management. It is preferable that consultants have successfully completed similar projects for other entities in the conservation field.

This will be considered a Master Contract for general services to be requested on an “as needed” basis. As such, every request will be unique with its own goals for impact and delivery and each project or task will be assigned a specific deadline. The Open Space Authority offers no guarantee of any amount of work to be performed under the Contract.

BACKGROUND

The Santa Clara Valley Open Space Authority conserves the natural environment, supports agriculture, and connects people to nature, by protecting open spaces, natural areas, and working farms and ranches for future generations. Since 1993, the Authority has protected almost 30,000 acres of open space, natural areas and working lands, watersheds, and wildlife habitat – providing ecologically friendly outdoor recreation and preserving the natural beauty and environmental health of the Santa Clara Valley. Accredited as a District of Distinction by the Special District Leadership Foundation, the Open Space Authority is committed to sound fiscal management, and governance policies and practices to effectively operate and govern a special district in a transparent manner.

The Open Space Authority’s Communications and Media Program is responsible for leading the Authority’s public communications initiatives and media engagement, building strategic partnerships, and other related matters. Through these areas of responsibility, we support all other Open Space Authority departments in the important work they do.

A primary function of the Communications Department is to support the mission of the agency through informing the public, our partners, our partners’ networks, community leaders, and decision makers about...

- The importance of nature-based solutions to climate change and how they help make our communities more resilient, livable, and provide residents with opportunities to live healthier lives;
- The benefits provided by natural infrastructure for natural and human communities that help our region adapt to events exacerbated by climate change - such as floods, drought and wildfire - while mitigating its impacts;
- Local opportunities to explore, appreciate, and learn from nature, whether at our open space preserves, or closer to home;

- The importance of fostering a welcoming and inclusive environment where all people feel safe and comfortable to explore the outdoors;
- The ability of agriculture and food systems to thrive in Santa Clara County to help address food insecurity in vulnerable populations, while also providing many other climate resilience “services” to the public at large; and
- The power of storytelling to describe our work, including at the landscape level, with a focus on how everything is connected and that we not only protect, but also restore natural and working lands to maximize nature’s benefits.

In addition, the Communications team helps to support the agency’s long term financial sustainability by educating the public about initiatives that establish new funding sources relevant to our work, at local, state and federal levels, without in any way advocating for those initiatives.

Communications and Media

The Communications and Media Program is responsible for strategizing, writing, designing, and distributing news releases and responding to inquiries from the public, as well as traditional and ethnic media, publishing online e-newsletters, annual impact report publications, enhancing and managing the Authority’s website and social media platforms, developing and curating content, photos, videos, as well as creating graphics for brochures, reports, event collateral, and public notices to build awareness about the Open Space Authority, and the agency’s mission and work. The Program also distributes timely public safety and preserve closure notifications as needed, with Communications serving as the agency’s hub for internal communications on these matters.

Strategic Partnerships

This Program supports agency-wide, interdepartmental efforts to build and maintain relationships with community leaders, community-based organizations, agencies, and other individuals and groups – inside and outside of the conservation field – that do work that promotes the Open Space Authority’s mission. Communications helps to identify, plan, and facilitate community engagement events, programs, and other opportunities that help deepen relationships with organizations and the communities they serve, and help build a stronger network of collaboration across our region.

Target Audiences

The Agency’s audiences are the most important aspect of this engagement plan. They are the reason content is created, and they must be defined correctly to produce the appropriate content for them. Audience segments are ever-changing and that is why it is important to create dynamic segments. We let the audiences inform us of who they are and where their interests stand. Throughout the implementation of this plan, analytics will inform us about each segment and show who they are. After data is collected, each segment will be updated in this plan. As a starting baseline, the following segments will be utilized. In all cases, the various audience groups want to see evidence (in written content/photo/video) of their own personal impact and how people like them can engage with the Authority’s programs and open space lands.

Audience	Description
Staff	Staff are first and foremost content generators. Each department can provide valuable insight into what is happening at the agency. They also enjoy consuming and sharing the finished content that celebrates major milestones.

Elected Board and Citizens' Advisory Committee (CAC) Members	As a governing entity, the Board is interested in most content the agency produces to stay informed of what is happening. As a public-facing group, the CAC wants to receive stories that affect the communities they represent and how they can support.
Volunteers	Volunteers want to stay apprised of new opportunities to get involved with the agency including events, hikes, or outreach. In some roles, volunteers help build meaningful connections with visitors and nature. Volunteers are also imperative in helping protect and restore natural lands for future generations to enjoy.
Partners	Tribal partners, those the Authority works with on land acquisitions, and organization we partner with to connect people to nature through events.
Grantees	Grantees include organizations that receive funding through the Open Space Authority's Urban Grants and 20% Grant Programs.
Traditional and Ethnic Media	Media are looking for new and breaking news involving the agency such as new land acquisitions, interesting reports/data, important timely public information, and upcoming events.
Advocates	Interested in research and reports involving their area of advocacy, upcoming meetings and opportunities for public engagement, and stories from community members that support their efforts.
DEI Thought Leaders & Influencers	Including but not limited to those who advocate for accessibility, inclusion, diversity, justice, equity, and social and environmental justice.
Business leaders	Local business leaders are interested in evidence of how the Authority land protection efforts affect surrounding property values, the local/regional economy, and the local business community. They may also be looking for promotional/sponsorship opportunities.
Health leaders	Interested in research and reports regarding the impact of Authority land protection and programs on public health and access to healthy food. They are also interested in stories about community members who are using Authority lands and programs to get active, grow their own food, or buy local food.
Conservation/Environmental Community	Interested in research and reports regarding the impact of Authority land protection efforts and programs on the water supply, greenbelt, flood protection, and reducing/capturing greenhouse gases. They are also interested in public events and opportunities to engage with the public on the conservation values of local open space and Authority land protection programs.
Wildlife Experts/Enthusiasts	Interested in research and reports regarding the impact of Authority land protection efforts on native wildlife habitat and population protection. They are also interested in stories and photography that document local wildlife populations on these lands and encourage public interest in these species.

Farming/Ranching/Agricultural Experts	Interested in leasing OSA agricultural properties, or consulting in ag practices.
Elected officials	Local elected officials want to see information regarding the Authority's impact on the city or other jurisdiction they represent. This involves taxation, land acquisition, events, and stories of how their constituents use and benefit from Authority-managed property and programs.
Deep Engagement Communities	The Authority's diverse and often city-dwelling residents (especially those identified as Deep Engagement Communities) experience barriers to getting outside. These residents are seeking information about culturally-relevant, safe, and supportive group programs, transportation options/services, handicap accessibility, and reminders that Authority programs are free of cost and open to people of all ages.
Preserve/Event Visitors	Authority preserves and programs are visited by a diverse range of people in our community. In all cases, these visitors want to see people who look like them/their group reflected in photos, video, and written content.
Groups	Groups are looking for unique, scenic recreation and team building opportunities, socialization opportunities, and agency resources that will help them plan their outing. They may also be looking for volunteer service opportunities and ways they can share their group's skills with the community.
Youth & Families	Having to balance the needs of multiple people, families are looking for information about which programs and lands are accessible to young, mobility-challenged, and/or elderly family members. They may also be looking for educational opportunities for children and opportunities to encourage healthy lifestyle choices.
Individuals	Looking for clear and user-friendly information about public lands that make it inviting and easy to plan an outing independently. Individuals may also be interested in information about group programs and volunteer opportunities that they can join for a social experience.
Urban	Urban residents need information about safe and accessible group programs, transportation options, and the health benefits of getting outside. Urban residents may also be interested in information about the Authority's Urban Open Space Programs, for programs closer to their neighborhood.
People with Health & Mobility Challenges	Residents who are living with health and/or mobility challenges are looking for information about safe and supportive group programs and information about which lands are accessible to their personal needs.

People who are English as a Second Language (ESL) Limited English proficiency (LEP)	Non-English-speaking community members seek written information translated – or better yet, transcreated - in their preferred language.
Potential Visitors	People that are new to the Open Space Authority need to hear about the many benefits of Authority lands and programs and ways that these assets can help them meet the challenges they face. They also want to see people like them reflected in the stories and imagery, so they can envision themselves participating in these programs and engaging with these lands.
General Public	People that are new to the Open Space Authority need to hear about the many benefits of Authority lands and programs and ways that these assets can help them meet the challenges they face. They also want to see people like them reflected in the stories and imagery, so they can envision themselves participating in these programs and engaging with these lands.

OBJECTIVES

The Communications and Media program is continually expanding and evolving, necessitating external collaboration to assist in reaching specific audiences and broadening local influence.

Specific objectives include working with the Program to:

- Create strategies that build awareness among the Authority’s constituency about the Authority’s mission, programs and projects.
- Understand differences between the Authority’s audience segments and develop related press content and outreach strategies that best resonates with each audience.
- Grow audiences in which the Open Space Authority currently has less penetration.
- Build and maintain strong professional relationships with traditional media outlets and journalists, and in doing so, build those relationships for Authority staff, as well.
- Collaboration with Open Space Authority vendors and consultants, including, but not limited to ethnic media, graphic design and print vendors.
- Maintain the highest professional standards in all media interactions, with the goal of having the Authority portrayed in those highest standards by the media.
- Create compelling content marketing strategies and deliverables that support SEO, social media and brand growth.
- Help the Open Space Authority build, maintain and manage a positive reputation through the creation of timely, accurate, transparent, truthful and action-oriented messages that resonate with targeted audiences.

SCOPE OF WORK

Project tasks include but are not limited to:

- Creating and implementing marketing and public relations strategies, content and deliverables through earned, owned and paid media; and
- Implementing media outreach and media tracking, and media training for agency spokespeople; and
- Strategizing and implementing marketing strategies to spread the word about Open Space Authority events and projects using traditional and new media communications platforms to promote the Authority's work. Includes but is not limited to: print and online media, broadcast media including radio and T.V., media events and tours; social media strategies; and
- Designing methods for ongoing public engagement with the communities served by the Open Space Authority; and
- Identifying and collaborating with influencers who have a considerable following and credibility to strategize and implement marketing strategies that align with the goals and objectives of the Communications Program; and
- Working in collaboration with other Open Space Authority vendors, service providers, and partners including, but not limited to Ethnic Media Consultants to create cohesive and inclusive public relations and marketing strategies and deliverables; and
- Creating collateral and content, including but not limited to printed collateral, messaging for staff, surveys, and other materials as needed to communicate with communities or residents that have limited awareness of the mission and work of the Open Space Authority.

SUBMISSION, REVIEW & SPECIAL CONDITIONS

REQUIRED INFORMATION

1. A fee schedule, including hourly rates for the different types of work performed.
2. A detailed description specifying the consultant's approach to completing the project tasks and deliverables.
3. A detailed description of consultant's experience in providing public relations and marketing communications services for public agencies.
4. A list of at least three (3) clients (include names of contact persons, telephone numbers, brief description of the work performed) for whom the consultant has performed services similar to those required by this RFP.
5. Review sample contract and provide a statement that indicates agreement to its terms including the insurance requirements. (See Attachment A.)

PREPARATION OF RESPONSES

All responses to the items in the REQUIRED INFORMATION section must be answered fully and must be able to be substantiated by the vendor.

KEY DATES*

Event	Tentative Date
Request For Proposals Issuance	10/18/2024
Last Day for Question Submittal	11/06/2024
Final Addenda Issued	11/08/2024
Proposals Due	11/15/2024 by 5:00 p.m.
Award Bid	12/12/2024

* Dates subject to change

SUBMISSION OF RESPONSES

Proposals must be delivered by email (with attachments, if any) to the following email address: proposals@openspaceauthority.org, with the following language in the subject line of the email "Attention: RFP-2024-09 re: Public Relations and Marketing Communications Services"

The Authority cautions vendors to assure actual delivery of emailed responses directly to the address noted above by the established deadline. File attachments recommended to be under 10MB; emails with attachments greater than 20MB may not be successfully delivered. A response received by the Authority after the established deadline will not be considered.

Proposals will be received only at the email address identified above. All proposals must be received by email only by the Authority prior to 5:00 p.m. November 15, 2024.

- A. Email ONLY. Mail and facsimile responses will not be considered. Proposals will NOT be accepted via fax, mail, or by courier. Late responses will not be considered. Vendors shall have sole responsibility for delivery of responses on time and to the proper email address.
- B. Response Format:
To facilitate the analysis of responses to this Request for Proposals, vendors are required to prepare their responses in accordance with the instructions outlined in this section. Each vendor is required to submit the responses in a sealed package. Vendors whose responses deviate from these instructions may be considered non-responsive and may be disqualified at the discretion of the Authority.

Responses should be prepared as simply as possible and provide a straightforward, concise description of the consultant's capabilities to satisfy the requirements of this Request for Proposals. Emphasis should be concentrated on accuracy, completeness, and clarity of content. All parts, pages, figures and tables should be numbered and clearly labeled. No page limit, however, responses should be comprehensive, succinct and direct. Font size should be no less than 11 points.

The responses should be organized into the following major sections:

1. PROPOSED FEE SCHEDULE

The consultant must include pricing for all proposed services and include a breakdown of costs (by hourly, by monthly, by task, by deliverable, etc.).

2. DESCRIPTION OF PROPOSED SERVICES

Proposal must address each of the tasks requested in the scope of work described above, and any additional tasks that may be necessary to accomplish the stated goals. The response should provide descriptions for how the consultant intends to complete the work. The Authority prefers consolidated and comprehensive services for the entire scope of services.

3. DESCRIPTION OF EXPERIENCE

The consultant must provide a description of experience, including detailed descriptions of the consultant's experience in developing multicultural and multilingual marketing and public relations strategies. Please do not include information on projects that are not similar in scope and character to the scope of work described in this RFP.

4. CLIENT REFERENCES

Firms should provide a list of at least two (3) clients (include names of contact persons, telephone numbers, brief description of the work performed) for whom the firm has performed services similar to those required by this RFP.

5. STATEMENT OF AGREEMENT WITH TERMS OF CONTRACT

The consultant must provide a statement that indicates agreement to the terms of the contract including an agreement to meet the insurance requirements.

- C. No Deviation: Any deviation from the requirements listed below may result in the response being considered non-responsive, thus eliminating a vendor from further consideration.

SELECTION CRITERIA

Responsive Proposals will be evaluated for: consultant's approach, strategy, and execution to complete tasks; proposed fees and rates; relevant experience of the consultant, and previous client satisfaction. Staff may conduct in-person interviews as part of the selection process. A selected proposal must be approved by the Board of Directors. The Board may reject all proposals.

ADDENDA

Authority will post any addenda on Authority's website. Consultants shall be responsible for ensuring that all addenda are included in their responses.

REJECTION OF RESPONSES

The Authority may reject any proposal if:

1. The consultant/vendor fails to respond to the RFP Required Information, or otherwise comply with the format and submission required set forth in this RFP, or
2. The consultant/vendor misstates or conceals any material fact in the response.

The Authority may reject all nonconforming, non-responsive or conditional proposals, and may waive any minor informalities or irregularities in any proposal and at the Authority's sole discretion.

VENDOR QUESTIONS

Any questions about this RFP shall be submitted in writing to proposals@openspaceauthority.org on or before November 6, 2024. Agency will post written responses to questions and email answers to vendors/consultants no later than November 8, 2024. Responses may be posted incrementally as received.

PUBLIC RECORDS LAW

Pursuant to the California Public Records Act (California Government Code Section 6250 and following), public records are open to inspection at all times during the office hours of the Authority and every person has a right to inspect any public record or request copies of public records. All submitted responses are public records and are subject to public disclosure pursuant to the California Public Records Act.

ACCEPTANCE

Submission of any response indicates acceptance of the conditions contained in this Request for Proposals.

RESPONSE COSTS

Those submitting responses do so entirely at their own expense. The Authority will not be responsible for reimbursement to any individual or firm for any costs incurred in preparing or submitting responses, providing additional information when requested by the Authority, or for participating in any selection interviews or meetings.

NON-DISCRIMINATION

No person shall be excluded from participation in, denied any benefits or otherwise discriminated against in connection with the award and performance of any contract on the basis of race, religious creed, color, national origin, ancestry, physical disability, mental disability, medical condition, genetic information, marital status, sex, gender, gender identity, gender expression, sexual orientation, age (over 40), military and veteran status of any person, or any other non-merit factor unrelated to job duties and protected by law.

List of Attachments

Attachment A – Contract Template