

RFP - Communications/Marketing Support and Graphic Design Services

Vendor questions as of February 26, 2013

We see that the enclosed Strategic Marketing Plan for EU and Communications Plan for RE were both prepared by ProProse Social Marketing Solutions. As they have already performed this service, our firm is wondering if this would specifically preclude ProProse from submitting a proposal/being awarded a contract under this particular RFP, or, if they would still remain a candidate despite work already performed.

Propose Social Marketing is the current vendor contracted to perform services through June 30, 2013. Propose's work to develop the strategic marketing plans for both Roseville Electric and Environmental Utilities was performed as part of supporting the utilities operating needs with respect to marketing, outreach and communications and was not done in connection with developing specifications for the RFP in any way. As such, the City of Roseville has determined that ProProse is eligible to submit a proposal for this current RFP.

We are a design firm out of Chicago, Illinois. We are interested in providing information for the RFP. Your mandatory pre-proposal meeting is on March 6 at 3pm. Can we do a video conference call for that? Or are you only looking for vendors from California?

The City of Roseville highly encourages interested firms to attend the Mandatory Pre-Proposal Meeting in person; however, we are exploring either a conference line or a GoToMeeting set-up for those firms not able to attend in person. More details will be provided via the City's RFP site shortly.

Has a specific date been decided for the bidder's conference?

The Mandatory Pre-Proposal Meeting will be held on:

Wednesday, March 6, 2013 at 3 pm
City of Roseville Corporation Yard
2005 Hilltop Circle, Roseville, CA 95747
Meeting Rooms 2 and 3

Is there is an incumbent company, and if so, can I please request its name and contact information. Will there be any DBE participation requirement?

There will not be a DBE participation requirement, but all vendors are encouraged to use DBE's as applicable. The two current incumbent vendors are:

ProProse Social Marketing Solutions
Anne Staines, 916-359-8316

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FUEL Creative

Steve Worth or Brent Rector, 916-669-1591

If there is any federally funds in this project, is CMAS been given a consideration?

There are no federal funds involved in the activities supported by the successful candidate. CMAS is not being utilized for this RFP.

Questions from RFP Mandatory Pre-Proposal Meeting held on 3/06/13 @ Corp Yard, Meeting Rooms 2&3; questions submitted by e-mail.

1. Will you provide a list of attendees?

Yes, we will post the list of attendees (in-person and by webinar) on the city's website.

You can find it at

http://www.roseville.ca.us/eu/news_n_information/request_for_proposal.asp.

2. Is signing in via the webinar sufficient to be considered in compliance for submitting a proposal?

Yes.

3. What is the overall budget for the 3 years of implementation?

This will be posted to the RFP website located at

http://www.roseville.ca.us/eu/news_n_information/request_for_proposal.asp.

4. Are you satisfied with your current vendor in terms of creativity, responsiveness, materials developed, implementation of outreach?

Yes for both Environmental Utilities and Roseville Electric.

5. Do you require samples, calendar, and portfolio with bid?

Per the posted RFP, please provide samples/portfolio and other examples that help show your qualifications and ability to perform.

6. Is your current vendor's contract available to view?

Yes, please contact Sean Bigley by e-mail at sbigley@roseville.ca.us if you would like to be sent a copy. Roseville Electric's contract is available at the City Clerk's Office or you can email Vonette McCauley at vmccauley@roseville.ca.us

7. Should the agency consider labor & expenses for the budgeted amount?

Generally expenses such as paid media will be directly invoiced to the city. The agency will bill the city for labor fees (primary and subcontracted) on a single monthly invoice.

8. Is your current provider local to Roseville?

No, the two firms we currently work with are located in Sacramento.

9. How will candidates / interviews be selected?

Rating sheets will be developed to both 'short list' initial proposals and to be used during the subsequent interview of short listed candidates. The rating sheet will align to the criteria outlined in the RFP.

10. Is there a preference for small business, local owned, woman based?

No, but candidates are encouraged to include the use of such firms, as applicable, to their business practices.

11. Can we get a copy of the slide show presentation?

Yes, it is posted at the RFP site at http://www.roseville.ca.us/eu/news_n_information/request_for_proposal.asp .

12. Are there caps on hourly rates?

No. Per the RFP, you are asked to provide hourly rates. These rates will be looked at in the selection process as proposed by the vendor.

13. Is cost a factor?

Yes, but not the only factor. As stated in the Mandatory Pre-Proposal Meeting, our objective is to find a firm that provides high quality work. Keep in mind, however, that Roseville Electric and Environmental Utilities are municipally-owned utilities and are essentially "customer owned."

14. Which individuals are serving on the selection panel?

The panel consists of six city employees who are familiar with the utilities communication and marketing needs.

15. In the budget, it is stated that there is a confirmed paid media budget of \$303,000, with possible, additional paid media of \$150,000. Do these figures represent allocations for media purchases only? If so, do you have funding for program development, creative services, and implementation, or are those services to be

included in the \$303,000. If not included, what do the departments have budgeted and/or what are they seeking for program development, creative services, and implementation?

Both Roseville Electric and Environmental Utilities have provided a budget breakdown by category. Please see that document. The document handed out at the meeting by Environmental Utilities represents the paid media budget and does not include firm fees for either the PR firm or graphic design subcontractor or other vendors. That will be budgeted in addition.

16. What is the total budget for this project per year and over the course of the contract? Please break out fees vs. costs for paid media vs. expected other direct costs.

The documents posted and passed out at the Mandatory Pre-Proposal Meeting represent the paid media budget for Environmental Utilities. Roseville Electric's budget is also available at the website. The budget for agency fees will depend upon what the successful agency proposes and what is agreed upon between the successful agency and the city.

17. Do you wish the selected firm to implement the existing marketing plans provided with the RFP?

Yes. But we are open to creative revisions that will build and improve on these plans, provided such improvements stay within existing budget limits.

18. Please explain the role of ProProse in their work for EU and Roseville Electric.

Roseville Electric: We provided ProProse with the results and raw data collected from the customer communication survey. They created and now assist in implementing the strategic communication plan.

Environmental Utilities: They have provided the service levels largely described in the current RFP.

19. How long has ProProse worked for Environmental Utilities and Roseville Electric?

Roseville Electric: January 17, 2012.

Environmental Utilities: December 9, 2011

20. Why are you issuing an RFP at this time?

To allow qualified firms to provide competitive proposals as outlined in the RFP.

21. In Section 1 under the Scope of Work it asks the potential agency to provide bids for the types of work A-H.

a. Is there a cost proposal format you would like all proposers to use for consistency?

Please provide per hour charges for the varying service levels you provide. Please provide a definition for each per hour fee your quote.

b. In the bid, how do you want us to address the “as needed” jobs?

Provide a per hour charge for these 'ad hoc' or unconfirmed activities.

25. In Section 4 subsection N (Pricing) it states that the City will only award a contract if the cost of the agreement is at or below the approved funding allotment.

a. What is the approved funding allotment that bids must be below?

Please provide a per hour fee schedule as requested in the RFP. The city can then determine the level of service that can be accommodated within approved budget levels.

b. Is this a low bid proposal? If not, how will the hourly rates and/or total price bid for each element of the Scope of Work in Item 1 be scored?

Low bid is not the overriding factor. The ability to provide quality work based upon the requirements detailed in the RFP are a primary factor. Per hour charges will also be ranked, but low bid is not the primary factor necessarily.

26. Section 6: Where do you want the minimum standards to be addressed within the proposal response?

Whatever makes sense to provide a logical, compelling proposal.

27. In Section 11, it states that there are forms included in the Contract Documents that must be filled out and signed, but the only form included with the RFP or sample contract is the Exhibit E Noncollusion Declaration. Similarly: In Section 4, it states “Proposal forms received after the deadline date will not be accepted.” Are

there specific multiple proposal forms we should use that is part of the forms mentioned in Section 11?

For this RFP, the only additional Contract Document that needs to be submitted with the proposal is the Noncollusion Declaration, located at Exhibit "E."

28. Are there any requirements, prohibitions or general preferences on how proposals are bound, or if you prefer they be clipped as opposed to spiral/comb binding, etc.?

Whatever presents an easily read, clear and compelling proposal. Please refer to the RFP document posted on the city's website.

29. Are there any forms which need to be signed and submitted with the proposal other than the provided non-collusion affidavit?

No. Please see the answer to question 27 above.

30. Do you require a digital copy (i.e. CD, flash drive) in addition to the six printed copies?

Six hard copies is all that is needed per the RFP.

31. It is mentioned in Item 4. that "each proposal shall be enclosed in a sealed envelope;" does this mean that each of the six copies should be in it's own separate sealed envelope, or that all six copies be put in the same sealed envelope, with cost proposals sheets in a separate envelope as requested?

Six copies be put in the same sealed envelope, with cost proposals sheets in a separate envelope as requested in the RFP document posted on the city's website.

32. To confirm the amount of the budget, as mentioned at the meeting, the total project budget is \$408,000, with \$105,000 allotted for Roseville Electric and \$303,000 for Environmental Utilities, is this correct?

Correct.

33. Regarding the information supplied for confirmed paid media for EU: It appears that the total value of the first four tasks (not including the unconfirmed

projects) add up to the total confirmed paid media amount of \$303,000. Is the total approved budget for the project higher than \$303,000, or is this a total not-to-exceed amount; e.g. in providing Pricing under Item N. of the proposal requirements, does the total value of work to be performed for EU have to stay at or below \$303,000?

\$303,000 is the paid media budget only. Not fees for implementation, event support, strategic advice, media support, etc.

34. Additionally, how is “paid media” defined by the City of Roseville; can you provide a specific breakdown of what “paid media” is intended to include, as specifically defined for this RFP?

The cost to publish the ad in the media selected. Example, the Roseville press Tribune’s charge for placing a half page ad or the cost that News10 charges for a 30 second television spot.

35. Is there a pre-determined numerical scoring system or any similar criteria in place to evaluate each proposal?

One is being developed.

36. Item C. of the Proposal Requirements asks for a “statement of financial” resources; does a balance sheet or corporate income statement satisfy this requirement, or is further documentation needed?

“Statement of financial” resources; balance sheet or corporate income statement is helpful and whatever other information that clearly establishes financial stability of the agency.

37. In Item B., as we are detailing the staff assigned to the resulting agreement, are you requesting a full resume for each project staff member and/or an organizational chart?

Whatever establishes that staffing resources and capacity of the firm to perform the services requested. If a resume, establishes this, then please provide.

38. Item K. requests a “system our company uses to communicate with clients.”

Are you asking for specific software or programs that we use, or our general approach/methodology and a delineation of our client communication process and employee evaluation?

Communication methods and practices you use to keep your clients informed and use to elicit decisions as well as provide feedback along implementation.

39. As part of the scope of services, do you anticipate that the contracted agency will be tasked with marketing/public outreach projects or other activities specifically related to potential forthcoming service rate increases for Roseville residents by EU or RE?

There may be circumstances where the firm’s services will be used, specifically in the area of strategic advice sought.

40. Item 6A. states that proposals will be evaluated on “Ability of the Contractor to provide innovative approaches and techniques in the delivery of services and partnering with the City to reach high quality outcomes.” Will this be evaluated solely through each firm’s previous qualifications, work and samples of work performed?

It will be based on both the proposal submitted initially which should include work examples and for those short listed firms, information obtained in the vendor interview and a background check of previous clients.

41. Please confirm that you are looking for bios for staff under section B, Statement of Qualifications.

Yes, please provide bios.

42. What portions of Exhibit A and B (strategic and communication plans) have been implemented? Have they been successful?

For Environmental Utilities: Most elements in the plan have been implemented on the paid media portion of the plan. For FY 2013-14, we will be doing less paid media and

focusing more energy on community engagement and event participation. The elements that have been implemented have been successful.

For Roseville Electric: The strategic communication plan was developed. The value messaging campaign has been implemented (print, digital, newsletters). And editorial calendar was developed. The contractor assists with social media and newsletter content. The contractor also finds and procures giveaway materials for outreach events. Media Relations items implemented: Day in the Life, Utilitour, Centennial.

43. Are portions of the strategic and communication plans going to be implemented in the future? If so, which components?

See above.

44. On page 6, under C. Financial Stability, there is reference to furnishing a statement of financial resources. Can this be whatever the bidder deems appropriate?

See above answer.

45. On page 7, under K. Communication, can you further clarify what you mean by systems? Do you mean the methods (email, phone, etc.) or do you mean the type of phone system, the types of computers, etc.?

See above answers.

46. On page 7, under N, Pricing, it says to provide per hour pricing list by service rendered as indicated in Section 1 above, however Section 1 does not reference any information on pricing. Please provide detail on what information is required and in what format.

Look at A-H on Section 1 and provide a per hour pricing list in a format that covers the types of services in A-H. The format should be whatever provides a clear picture on your per hour pricing structure as it relates to A-H.

47. Please confirm that no references are required.

Although not explicitly requested, firms are encouraged to provide references to demonstrate the agency's qualifications per Section 4B. References will be required for firms short listed.

48. Please confirm that Attachment C will be signed upon award of contract and that the only attachments that need to be submitted are: Exhibit D and Exhibit E.

Exhibit C, the Professional Services Agreement, will only need to be signed by the selected agency. The Agreement is included in the RFP packet for reference only. Exhibit D, the Insurance Requirements, are also for reference only and proof of insurance will need to be submitted prior to execution of the Agreement with the selected agency. Exhibit D is provided so that all entities are aware of the insurance provisions required by the City. Exhibit E, the Noncollusion Declaration will need to be submitted by each agency.

49. Is the budget outline for Roseville Electric, on page 31 of the ProProse comms plan, for only one-year?

Yes

50. Is the \$105,000 figure provided at the pre-proposal meeting replacing the \$62,813 consultant budget for 2013?

No. The \$105,000 figure is the amount allocated for paid media and outreach activities. The figure does not include the consultant contract cost.

51. What is the total two-year budget, paid media and fees, for the Roseville Electric and Environmental Utilities Communications/Marketing Support and Graphic Design Services contract?

Environmental Utilities: the paid media and outreach budget is \$303,000 – see attachment posted on city’s website at

http://www.roseville.ca.us/eu/news_n_information/request_for_proposal.asp. No amount was listed for consultant cost.

Roseville Electric: the paid media and outreach budget is \$105,000 – see attachment posted on city’s website at

http://www.roseville.ca.us/eu/news_n_information/request_for_proposal.asp. No amount was listed for consultant cost.

52. On page 7 of the RFP it states, “The City will only award a contract if the cost of the agreement is at or below the approved funding allotment.” What is the approved funding allotment?

Environmental Utilities: The FY14 consultant cost is not available as the budget is not approved.

Roseville Electric: The FY14 consultant cost is not available as the budget is not approved.

53. What kind of marketing staff exists in-house? Is there a PR team or person? Who is the point of contact?

Roseville Electric: Point of contact: Vonette McCauley, Electric Public Relations Manager. Roseville Electric’s team includes the Public Relations Manager and another full time staff.

Environmental Utilities: Point of contact: Sean Bigley, Government Relations Analyst. Environmental Utilities team includes the Government Relations Analyst (40% of duties consist of public outreach/communications/60% is dedicated to government relations) and part-time support staff member.

54. What does Roseville Utilities have to date that could be built upon of the following?

- o Press materials: EU: Templates created.
- o Key messages: Roseville Electric: Key messages developed for FY13. EU: Key messages in 3 year marketing/communications plan.
- o FAQ: Roseville Electric: FAQs are developed on an as needed basis. EU: FAQs are developed on an as needed basis.
- o Testimonials and case studies: Roseville Electric and EU: None
- o Media policy: Roseville Electric: Media policy is in place. EU: Protocol followed with Communications Department, departmental policy has been in place for five years.

- o Speakers bureau calendar, topics, bios: Roseville Electric: No speakers bureau or topics. Bio for Utility Director is created. EU: No speakers bureau or topics. Bio for Utility Director will be created once hired, now have interim director.
- o Crisis plan and calling tree: Roseville Electric: Crisis Communication Plan developed a few years ago. EU: None.

55. List of trade shows you attend and background on why you don't attend others, if there are shows that you have opted out of attending.

Roseville Electric: No trade show attendance. Community outreach event calendar created. EU: No trade shows, have consistent yearly events, but will add more in FY 14.

56. Corporate spokespersons:

Roseville Electric: Spokesperson is typically Vonette McCauley. Others will be interviewed by the media as needed.

EU: Spokesperson is typically Sean Bigley or EU Director. Others will be interviewed by the media as needed.

57. Third-party / external spokespersons:

Roseville Electric: None.

58. What PR KPIs exist today? We understand including metrics is part of this assignment, but need to know what you are measuring today and what you want differently. Have any of your internal corporate spokespersons been trained? As training is desired, please state if you would like this budgeted for implementation post receipt of plan and internal message development? For budgeting purposes, how many days would be needed?

Roseville Electric and EU: Yes our corporate spokespersons are trained.

59. Do you want digital/social recommendations in this plan?

Yes.

60. Please provide examples of the types of events that you would need support with; what type of support is needed – planning from scratch, assistance with planning, securing media coverage, staffing, other? How many would you like us to budget?

Roseville Electric: Utilitour is an event that requires support. We have relied upon our contractor to develop the events ensuring it aligns with our messaging; they secured locations, handle logistics and procured the giveaway items.

EU: Utilitour is not the format we want in FY 14 and beyond. We are looking to participate in existing community events. Some events we are interested in include Earth Day, Movies in the Park, Public Safety Day, among others. We would want the contractor to help plan and implement a set schedule of events each fiscal year that does not require a significant amount of staff involvement in planning and makes it easy for staff participation. This will require significant planning and implementation by the selected firm as well as event day coordination by the selected firm. The contractor's role is to make sure that events are planned and executed in an efficient manner, within budget and with successful results for Environmental Utilities consistent with our 3 Year Marketing/Communications Plan.

61. Do you have a crisis communication plan?

Roseville Electric: Yes. EU: We are incorporated under the city's plan.

62. Is this preparatory work? Development of a crisis plan? Crisis drill? Issues monitoring? Actual crisis counsel/work?

Roseville Electric and Environmental Utilities respective strategic communication plans do not have a crisis communication plan component.

63. What boards, commissions and organizations do your executives currently sit on? When we recommend enhancements, we do not want to duplicate efforts.

Roseville Electric: Roseville's Utility Director is the chairperson of BANC, and an NCPA and CMUA board member.

EU: Director is currently being recruited. We participate in many organizations including Solid Waste Association of North America, California Municipal Utilities Association, Association of California Water Agencies, California Product Stewardship Council

(board), California Stormwater Quality Association, California Urban Water Conservation Council (board), Central Valley Clean Water Association, South Placer Wastewater Authority (board) and Water Reuse.

64. Do you have existing wire service and media monitoring contracts, or do you want our budget to include this?

Roseville Electric and Environmental Utilities does not have media monitoring contracts.

65. Do you want us to include fees for daily media monitoring services by our staff in the budget?

Roseville Electric and EU: If you feel it's necessary to include.

66. You mentioned in the pre-proposal meeting that vendors should invoice directly and the paid media amounts were for fees, not expenses. Is there a cap on expenses or the costs of contracting with vendors?

Roseville Electric and EU: Services that exceed \$20,000 require City Council approval.

67. Last year's successful proposal and contract for ProProse and Fuel Creative are not readily available on the website. Will we be able to see those public records for crafting our proposals?

See above process to request a copy of these contracts.

68. How will you evaluate if a firm bidding on the contract has sufficient staff resources and capacity? Do we need to prepare testimonials from clients?

Testimonials are helpful and whatever else that helps to create a compelling proposal that demonstrates the desired qualities as outlined in the RFP.

69. In the pre-proposal meeting you outlined "paid" media budgets, for both EU and RE - please clarify agency fees for FY2013/14? Do these agency fees need to be within the \$250k and \$105k budgets?

Roseville Electric and EU: The consultant contract is separate from those budgets.

70. Can you share previous marketing/graphic design RFP and SOW with budgets?

Not sure what this question is asking.

71. For agency fees, would you prefer a monthly agency retainer for FY13/14 as a blended rate for EU and RE, an hourly rate card, or project based cost proposal?

Hourly rate card.

72. Can you share copy of presentation shared yesterday? Where are the resource documents that you are sharing with the larger group located? Is this the website link during the RFP process until 4/1/13?

All documents are posted in the city's RFP page as well as at this location - http://www.roseville.ca.us/eu/news_n_information/request_for_proposal.asp.