Request for Proposals

Securing Your Water Supply

WESTERN MUNICIPAL WATER DISTRICT IDENTITY INITIATIVE

Districtwide Brand Program

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1.0 INTRODUCTION

Request

Western Municipal Water District's (Western) Strategic Communications Department is seeking consultant services for the following scope of work. Please submit your estimate and qualifications as soon as possible but no later than **Friday, Jan. 3 at 10 a.m.** to be considered a candidate for services.

About Western Municipal Water District

Western Municipal Water District is one of the largest public agencies in Riverside County providing water and wastewater services either directly or through our sub-agencies to more than 880,000 people across 527-square miles in one of California's most populous regions.

Providing reliable drinking water, recycled water and wastewater services to our customers daily is fundamental to what we do. Western works to secure your water supply for today and for future generations.

Western supplies water on both a wholesale and a retail basis to a region stretching 527-square miles in western Riverside County with an assessed valuation of $83 billion and a population of more than 880,000 people. This regional area includes the cities of Corona, Norco and Riverside and the water agencies serving Box Springs, Eagle Valley, Lake Elsinore, Temescal Valley and Temecula.

Western currently sells approximately 85,000 acre-feet of water annually. This is equal to about 28 billion gallons of water. One-quarter of Western's sales are to retail customers; three-quarters to wholesale. About two-thirds of the water Western sells is treated; the balance is untreated or raw water. About one-quarter of water sales are for agricultural uses; the balance is for domestic purposes. Nearly all water sold by Western for agricultural purposes is used to irrigate citrus and avocados planted since the 1950s.

As a member agency of The Metropolitan Water District of Southern California, the state's largest water supplier, Western receives most of its water from the Sacramento-San Joaquin Bay-Delta and from the Colorado River.

Western has a groundwater supply in its Murrieta Division, which is combined with imported water for the region's residents. Western also has rights to groundwater in the Bunker Hill Basin, which is transported into our Riverside Division through an agreement with the city of Riverside.

Background

After undergoing a comprehensive strategic communications planning effort, it is clear that Western needs a fresh, compelling identity that not only resonates with customers and member agencies –the way they think, feel and interact with their community—but that can also support a broad range of regional activities that positions Western as a regional leader in water and sewer services focused on providing a best-in-class customer experience.

Seeing ourselves as more of a business than a bureaucracy with a focus on exceptional customer services, Western has much to offer customers. However, research has shown that there is a significant disconnect between the quality of services offered and public perception.

To aid in aligning public perception with the district's strategic priorities and vision, Western is seeking proposals that can develop a concise and clear identity and marketing strategies capable of highlighting Western's distinctive strengths while also positioning Western as an essential partner in ensuring long-term water supply for our region.

2.0 SCOPE OF WORK

Western's goal is to develop a fresh identity that clearly defines who Western is, what we do, and why what we do is important to customers. The new identity must include a brand platform as well as a new visual system to synthesize Western's key messages in a succinct and compelling way that resonates with customers, key stakeholders, business partners and beyond. The identity must work for both customer outreach purposes as well as regional and legislative positioning.

The brand must support Western's 2019 adopted Strategic Communications Plan (SCP), which outlines the organization's guiding principles for communication; outlines the messaging that will be used in all efforts; details the tools and tactics that will be used to deploy the plan; and identifies the metrics that will be used to measure its effectiveness.

Finally, proposals must accommodate an aggressive project schedule with the goal of internally launching Western's new brand identity between summer and fall 2020.

Tasks

A. **Identify all steps in the branding/identity process** with justification for each. Include a project timeline to complete the project with the minimum steps required.

B. **Provide regular monthly reports** and negotiated benchmarks to the District's tracking of the branding process to ensure timely completion of the project.

C. **Design, Conduct and Analyze Research (as needed only)**: Determine the best approach to solicit input for baseline data (surveys, workshops, private in-person or phone discussion). Design appropriate research instruments, conduct the research, and analyze findings to help inform next steps. Note, significant research was recently conducted and included in the SCP.

D. **Develop Brand Platform:** Using the data collected from Step C, develop an identity platform that clearly articulates the District's purpose, values and key messages in a compelling way. The platform should be a comprehensive summary of Western and will be used as the language staff uses in every communication about the District. Again, this platform must align with the SCP's Master Narrative. An update to Western's mission statement to more closely align with the SCP and its key messages should be included as part of the project.

E. **Develop Strapline/Tagline:** Working from the identity platform language, develop one main strapline for Western that will be used as its main corporate identity message. An audit of local/regional water agencies should be completed to uniquely position Western and avoid visual overlap to agencies that provide similar services.

F. **Develop Visual System:** Create a visual system that expresses the brand platform, including a new logo and typography recommendations.

G. **Develop Prototypical Deliverables**: Create an identity implementation plan with several potential deliverables (not for production) that can be used to illustrate the power of the new brand. Project prototypical deliverables must include district promotional materials, uniforms/merchandise, business cards, stationary suite, vehicle decal, signage, pull-up banners, and e-news template. Other prototypical deliverables may include social media assets, website home page sample, advertisement sets, etc.

H. **Prepare and Present Final Report**: Once steps A through G are complete, Consultant will prepare a final report and visual presentation (electronic) to show at a meeting of Western's leadership group. Western staff will introduce the Consultant and guide discussion after the presentation. If requested, a similar presentation may be made to the Community and Government Affairs Board and Board of Directors during two public meetings.

Anticipated Staff Interaction

The summary below outlines anticipated touch points between the Consultant and district staff during the process. This will be refined and agreed upon during the initial kickoff meeting.

1. Initial kickoff meeting to review scope and establish project timeline
2. Meeting to review and approve recommended research methods
3. Meeting to review analyzed data from research and discuss next steps
4. Meeting to review and approve brand platform, master strapline and companion taglines
5. Discuss creative ideas prior to moving into the creative process
6. Meeting to review proposed visual system(s) ideas, discuss testing concepts
7. Secure necessary approvals on visuals

8. Dry run for leadership group presentation (with Strategic Communications Director and District project staff)
9. Executive Management Team group presentation
10. Community and Government Affairs Presentation (public meeting)
11. Board of Directors Presentation (public meeting)

3.0 RFP PROCESS

Process and Timeline

Delivery of proposals are to be made to the following address:

Western Municipal Water District
14205 Meridian Parkway, Riverside, CA 92518
Attn: Sarah Macdonald, Strategic Communications Department

Questions about this RFP should also be directed to Ms. Macdonald at smacdonald@wmwd.com.

All communication should reference **RFP SC-001**.

Western reserves the right to modify the content or schedule of these events at any time, for any reason. No proposal will be received unless it follows the format outlined by Western for this project. Please review the entire proposal request before submitting your proposal. Incomplete submissions may be rejected as nonresponsive.

Requests for Clarification

Interested vendors may provide requests for clarification in email or writing through the contact information above. Verbal questions/requests will not be accepted. Western will compile all requests and provide responses in written format to all vendors that request copies of questions/responses. If vendors do not provide such a request, they will not be provided with this information.

Proposal Delivery

Proposals are due to Western no later than **Friday, Jan. 3 at 10 a.m.** Proposals received after that date may be accepted or rejected by Western as non-responsive. In all cases, the vendor is responsible for ensuring that Western received the proposal. Vendors are encouraged to use electronic means for delivering proposals via .pdf. All proposals are to be clearly marked in the email subject line “Response to RFP for Western Municipal Water District Identity Initiative.”

Western is not responsible for late deliveries or postmarks. Proposals received in the mail after the deadline will not be accepted regardless of their postmarked date. Proposals cannot be accepted by facsimile.

No proposal will be accepted unless it follows the format outlined by Western for this project. Please review the entire proposal request before submitting your proposal. Incomplete submissions may be rejected as non-responsive.

Proposal Evaluations

The proposals will be evaluated by Western in accordance with the Evaluation Criteria Section below.

Validity

Vendor proposal must be valid for a period of at least 90 days upon delivery of the proposal. The proposal will explicitly state that validity.

Award of Contract

The Contract will be a time and materials; expected date of award is within fiscal year 2019-20 with anticipated, ongoing work through fiscal year 2020-21.

Purchase Order

Any Purchase Order for specific work under the Contract will be based on the Scope of Work in this RFP as modified during the negotiation process is subject to approval by Western's General Manager and/or the Board of Directors.

Pre-Contract Expenses

Western shall not, in any event, be liable for any pre-contractual expenses incurred by any proposing vendor in preparation of proposals, supporting materials, travel or incidental costs, or any other expenses. Proposing vendors shall not include any such expenses as part of the proposal.

Pre-contractual expenses are defined as expenses incurred in preparing the proposal in response to this RFP, preparing or presenting any information as part of the interview process, negotiating with Western in any matter related to the proposal, and any other expenses prior to the date of Award and execution of a Contract and Task Order.

Certificate of Insurance

Proposing vendor shall state its willingness and ability to comply with the required insurance coverage within seven days of notification of selection of award.

4.0 PROPOSAL REQUIREMENTS

The Proposal will be formatted as follows:

- Section 1: Introduction
- Section 2: Statement of Conformance with Requirements
- Section 3: Approach
- Section 4: Experience
- Section 5: Cost
- Section 6: Conflict of Interest

Proposals that do not follow this format or do not include all required information may be deemed non-responsive, and their proposal may be eliminated from consideration.

Proposals must be prepared simply and economically, providing a straightforward, concise description of what the vendor proposes to do, how they propose to do it, and what the cost of the effort will be. The proposal shall be clear, accurate and comprehensive. Brevity and clarity are valued over length.

Each of the requirements of these sections is described in more detail below.

4.1 Introduction

The vendor will describe the company/team, including an overview of subsequent sections. Benefits specific or unique to the proposing vendor should also be highlighted and discussed.

4.2 Statement of Conformance with Requirements

The vendor will state that it is able to meet all requirements of the RFP, or identify any exceptions/clarifications.

4.3 Approach

The vendor will describe their understanding of the project and document the proposed approach to be used to perform the required work. This should include experience/philosophy of what makes branding effective. The approach should expand to describe more detailed steps in the process.

4.4 Experience

Describe the consultant team and identify the specific personnel that will be assigned to the project and their roles, qualifications and relevant experience. Identify the supervisory and management staff. Identify and describe the roles of any sub-consultants and provide relevant qualifications and experience. Indicate how the quality of staff over the term of the agreement will be assured.

Key personnel assigned to the project may be changed. However, Western retains the right to approve or reject replacements.

Vendor shall detail their ability to provide services by describing the qualifications of their proposed project team, including:

- Name and title
- Proposed role on Western's project team
- Percentage of time available to work with Western
- Number of years of professional communication industry experience
- Experience if any working for Western or similar organizations handing activities listed in the scope of work.

- Contacts of at least three clients that are most similar to the project for work that was performed in the past three years.
- Items or services you are offering as an unspecified value-added, if any.

4.5 Cost

This section will provide all costs associated with your proposal. Please include the titles and hourly rates for all staff who could provide services under the contract.

4.6 Conflict of Interest

The vendor shall state that:

- It is able to legally conduct business in the state of California and the city of Riverside, California
- It has not colluded in any fashion with other respondents which would restrict or eliminate competition
- No employee or official of Western Municipal Water District shall have a material or monetary interest in this contract
- It is or is not aware of any other actual or potential conflict of interest related to this proposal and the projects being implemented.

5.0 EVALUATION CRITERIA

Proposals will be evaluated on the following criteria, not necessarily in order of priority. The vendor with the lowest responsive proposal may not be awarded the contract.

- **Project Understanding and Quality of Proposal (20 points)**: Response to the RFP and the attached appendices must be complete. Responses that do not include the proposal content requirement within this RFP will be considered incomplete.
- **Experience and Qualifications (25 points):** Experience relates to the thorough review of each company's written proposal for company experience developing and implementing brand programs similar in complexity to Western's requirements. Consideration will also be given for project management, implementation approach and history with developing public branding. Consultants are required to demonstrate a thorough understanding of the work and technical expertise.
- **Capability, Scope of Services and Approach (25 points):** The Consultant will develop a detailed scope of work to meet the requirements for completing a comprehensive rebrand to support Western's document goals and tasks within the RFP. Capability and scope of services should demonstrate direct experience with public sector clients launching and implementing effective brand programs with documented outcomes. A brand approach should be outlined in the proposal.
- **Cost Proposal (15 points):** The cost is reasonable for the effort proposed, is of sufficient detail to explain the cost drivers, and sufficient mechanisms are in place to control costs through the project.
- **Sustainability (10 points):** This scoring criteria considers the vendor's ability to provide a program that will last into the future, provide implementation schedule and support strategic brand guidance.

- **Local, Small Business Preference, Disadvantaged Business Enterprise (5 points):** A percentage of the total evaluation points are reserved for local, small business and/or disadvantaged business enterprise preference.

The successful vendor(s) will be expected to sign a contract. Western reserves the right to reject any or all bids or any part of the bid, to waive minor defects or technicalities, to award multiple contracts, or to solicit new bids on the same project or a modified project.