



**RethinkWaste**

South Bayside Waste Management Authority

**REQUEST FOR QUALIFICATIONS  
FOR ROLL-OUT OF NEW COLLECTION SERVICES  
EDUCATION & PROMOTION CAMPAIGN**

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San Carlos, CA 94070**

**Issued: April 24, 2009**

**Submittals Due:  
May 26, 2009  
3 pm**

## Request for Qualifications For Roll-Out of New Collection Services Education & Promotion Campaign

The South Bayside Waste Management Authority (SBWMA) is committed to environmental leadership in sustainable materials management practices to support livable communities.

We are soliciting interest from qualified firms (herein "Proposers") who share our vision and want to create a legacy of innovative and creative waste reduction and recycling programs that address all aspects of sustainability.

The SBWMA welcomes and encourages responses from communications and outreach firms who offer the following services: **strategic communications, public education, environmental marketing, media relations, and/or community engagement expertise.** Please note that submittals to the SBWMA are to be considered public records and will be available for public review.

Generally, the Authority is looking for assistance in promoting several ambitious environmental programs, including, but not limited to:

- Developing a public education and outreach campaign to promote the roll-out of new and improved garbage, recycling, yard trimmings and food scraps collection services that will start by January 1, 2011;
- Encouraging full participation of 90,000 residences and 10,000 businesses in the new programs;
- Achieving sustainable waste reduction programs for the SBWMA's residential, business, civic, school, and events sectors;
- Educating and engaging the public on the SBWMA's vision and goals.

Please refer to Section 3 for the specific scope of services being requested.

### **1. BACKGROUND**

The South Bayside Waste Management Authority is a joint powers authority in San Mateo County managing the collection and processing of garbage, recyclables and organic materials for the cities of Belmont, Burlingame, East Palo Alto, Foster City, Menlo Park, Redwood City, San Carlos and San Mateo; the towns of Atherton and Hillsborough; the County of San Mateo and the West Bay Sanitary District.

We have produced award-winning campaigns and programs, earned the distinction of Climate Action Leader™ through the California Climate Action registry, and are ClimateSmart™ partners with PG&E. The SBWMA is also committed to supporting organizations that promote resource conservation and sustainability in San Mateo County. We have community partnerships with

Acterra, IKEA, Sustainable San Mateo County, Bay Roc, San Mateo County Green Business Program and the U.S. Green Building Council.

Our mission is to design and implement sustainable waste reduction, recycling and facility operations services to achieve our Member Agencies' environmental goals and requirements. We are dedicated to providing a sustainable environment for our residents and businesses and to be a leader among all Bay Area cities and counties in conserving our natural resources

To that end, the SBWMA is planning for changes in the residential curbside, multi-family and commercial collection programs, which will take place in January 2011. The highlights of the future cost effective and innovative service offerings include:

- Weekly single stream (commingled) recyclables collection
- Weekly yard trimmings/food scrap collection
- New wheeled carts for all services
- Curbside collection of cell phones, household batteries, used motor oil and oil filters

For a more detailed description of future programs and services, please view our Future Collection Services video at [www.RethinkWaste.org](http://www.RethinkWaste.org). We strongly encourage all Proposers to learn about all of our programs and services by visiting our website.

## **2. INTRODUCTION**

This RFQ is Phase 1 of a three phase Design Competition. A panel comprised of SBWMA staff and Board members, environmental consultants and respected public education and outreach professionals will review all submitted Statements of Qualifications (SOQ). The panel will ultimately recommend 3 short-listed Proposers that will be paid a stipend to further develop and "flesh out" the concepts presented in their SOQ. The stipend is expected to be \$20,000 per proposer and will be awarded upon completion of Phase 2.

Phase 2 consists of the development and submission of proposed campaigns by the 3 short-listed Proposers. A panel will review these campaigns and make recommendations to the SBWMA Executive Director and Board of Directors based on a number of criteria, including originality of the design concept, level of community engagement, cost effectiveness, creating a strong sense of identity to the RethinkWaste brand, consistency or compatibility with other SBWMA communication tools (website, print materials) and sensitivity to the demographics of the SBWMA service area.

The winning Proposer will be chosen in November 2009 to fully develop the campaign, which is Phase 3. The preliminary budget for implementation is \$800,000 - \$900,000, which will include agency fees, campaign development, production, printing and distribution. The SBWMA reserves the right to award multiple contracts for services in the event the Authority determines Proposers are stronger in some areas than others.

**Timeline:**

PHASE	ITEM	DATE
<b>PHASE 1 - RFQ</b>	Request for Qualifications (RFQ) released	April 24, 2009
	Contact Name: Monica Devincenzi  Address: 610 Elm Street, #202 San Carlos, CA 94070  Telephone: 650.802.3509 E-Mail: mdevincenzi@RethinkWaste.org	
	Deadline for submitting questions to SBWMA by 3 pm	May 11, 2009
	RFQ due by 3 pm	May 26, 2009
	Interviews	Week of June 8 <sup>th</sup> , 2009
	Short List of Proposers released to Board of Directors for Phase 2 Design Competition	July 18, 2009
	Board decision on selection of Short-Listed Proposers and approval of contract template	June 25, 2009
<b>PHASE 2 - DESIGN COMPETITION</b>		
	Design Competition guidelines released to Short-Listed Proposers	July 27, 2009
	Design Competition campaigns due	September 9, 2009
	Campaign presentations to Selection Panel	TBD
	Final firm(s) for Phase 3 released to Board of Directors	October 15, 2009
	Board decision on selection of final firm(s)	October 22, 2009
<b>PHASE 3 - CONTRACT AWARD</b>		
	Contract negotiations with final firm(s)	October 23- November 11, 2009
	Contract approval by Board of Directors and commencement of campaign development	November 19, 2009

**Phase 1 – RFQ Evaluation Criteria**

DESCRIPTION	WEIGHT
Proposal Responsiveness	Pass/Fail
Proposer Experience	40%
Work Samples	40%
References	20%

### **3. SCOPE OF SERVICES**

Proposer shall provide to the SBWMA comprehensive communication services for various environmental programs, including but not limited to, the rollout of new collection and recycling services to residents and businesses in the SBWMA service area.

The Proposer's services shall also be provided as requested by the Recycling Outreach and Sustainability Manager on an as-needed basis as set forth in a specific project service order.

The Proposer shall provide strategic communications planning, public relations, community engagement, and other services for the SBWMA as outlined below:

#### **A. Strategic Communications Planning**

Assist with the development of a strategic communications plan related to implementation of a public outreach/education campaign for the SBWMA's environmental programs. This includes outreach strategies for affecting behavior change, or social-based marketing. This would include assistance with audience identification, key messages, development of goals and measurable objectives, cost effective public relations, and advertising tactics, community engagement methods, opportunities for free media coverage and partnerships with other business or public agencies to disseminate messages, and evaluation of outreach effectiveness.

#### **B. Creative Development Services**

Provide creative development to SBWMA staff for the production of outreach such as broadcast, print, and electronic (e.g. web, e-mail) advertising, brochures, fact sheets, direct mail, outdoor media, signage, video, displays or promotional items.

This may include providing services related to production of marketing materials including: copywriting, illustration, photography, art direction, graphic design/production, television and radio production, video production, and media planning services. Consultant will provide all final art to the SBWMA on disk, as well as in accessible PDF format.

#### **C. Media Relations**

Assist the SBWMA in promoting the new services by identifying news media opportunities, timing and preparation of press releases and media packets, key messages for the media, identifying appropriate media outlets, pitching of news stories, dissemination of press releases, video news releases, video footage (b-roll), and logistics and coordination of press events as needed. This may also include writing of news stories for print media such as newspapers, websites, and newsletters.

#### **D. Multi-Cultural Outreach**

Develop and implement outreach strategies and tactics for reaching non-English speakers, including developing different outreach campaign concepts from points of view that would resonate better with non-English speaking audiences as opposed to

straight translation of the English-language campaign materials. Translate and produce as requested, advertising and collateral material into designated foreign languages.

**E. Community Engagement Methods**

Assist with the development of public engagement strategies that encourage public input and involvement in the implementation of the SBWMA's environmental policies and programs. This may include publicizing opportunities for public input, meeting facilitation, agenda development, contacting interested parties and encouraging ongoing dialogue with the intention of reaching mutually beneficial resolution and outcomes with the public, community leaders and decision-makers.

**F. Presentation Materials**

Assist with preparation of presentations and written materials for meetings with the public, media, civic officials, business community, neighborhood associations, public officials, local government staff and other specific audiences.

**G. Electronic Media**

Assist with development of electronic media opportunities. This can include advertising on the Internet, email blasts, webinars, and blogs. All electronic media must meet appropriate Americans with Disabilities Act requirements.

#### 4. DESIRED QUALIFICATIONS

The South Bayside Waste Management Authority is seeking Proposers with expertise in environmental-related public outreach, education and promotion, strategic communications planning, media relations, and/or community engagement. The successful RFQ submittal shall demonstrate that the Proposer has the appropriate professional and technical background as well as access to adequate resources to fulfill the stated scope of services. **Any experience with outreach projects for cities with demographics similar to San Mateo County should be noted.**

Desirable experience, knowledge, and skills may include, but not be limited to the following:

- **Strategic communications** – Development and implementation of multifaceted public outreach campaigns that include clear objectives, audience identification, creative and cost-saving tactics; and methods of monitoring and evaluation.
- **Environmental communications** – Writing and designing audience-friendly communications on the complex topics of resource conservation, solid waste, recycling, composting, and other sustainability issues. An understanding of the programmatic and multi-agency framework associated with these issues is often important to effective communications. Skills with the following formats are needed: news releases, brochures, newsletters, advertisements, web pages, memos, reports, and digital forms of all of these.
- **Multi-cultural outreach** - Developing messages and materials that resonate with the intended audience, and having translation resources available.
- **Social-based marketing** - Developing strategies and tactics for creating behavior change such as conserving water, engaging in recycling, or using less toxic products.
- **Media relations** – Demonstration of existing media relations and networks; development of media plans; pitching news stories; developing PSAs; preparation of press kits, news releases or advisories, press kits; and planning for and handling of press events.
- **Community engagement strategies** – Outlining engagement strategies; sensitivity to political considerations; accommodating language needs of ethnic audiences; and planning for and handling of logistics for both small- and large-scale community meetings.
- **Collateral production** – Demonstrated capabilities for creative and cost-saving development of both hard and digital visually engaging materials

- such as brochures, newsletters, posters, signage, event displays, advertisements, and give-aways. **Use of environmentally friendly production techniques is required and should be emphasized.**
- **Broadcast production** – Demonstrated capabilities with traditional broadcast such as television, public access channels, and radio and video production.
- **Internet and e-media** – Demonstrated capabilities with digital media and communication channels such as websites, webinars, Internet advertising, email blasts, social networking, and pod casting.

## 5. TERM OF AGREEMENT – PHASE 3

It is anticipated that the SBWMA and the selected Proposer will enter into an agreement for a term of approximately 18 months with services and fees specifically set forth in the agreement. The SBWMA may decide to enter agreements with separate Proposers for different tasks.

## 6. FEE STRUCTURE

Submit one (1) copy of an hourly fee structure for all staff members who would be involved in the performance of the tasks outlined in the Scope of Services. Identify any work that will be subcontracted and include a list of the subcontractors' key personnel and hourly billing rates.

Please include sub-consultant costs (if any), markups and other pertinent costs in a sealed envelope clearly marked "**RFQ – Future Services Outreach.**" No other copies are to be provided.

## 7. PROCEDURE FOR SUBMITTING QUESTIONS AND INQUIRIES

7.1 All questions/inquiries must be directed to Monica Devincenz via e-mail at [mdevincenzi@rethinkwaste.org](mailto:mdevincenzi@rethinkwaste.org) by May 11 at 3 pm. The SBWMA will provide a written response to all questions in the form of an Addendum.

## 8. RFQ SUBMITTAL REQUIREMENTS

8.1 You must respond to this RFQ by May 26 by 3 pm as stated on the timeline of this document in order for your submittal to be considered. The submittal must be addressed to the attention of Monica Devincenzi, clearly labeled "**RFQ – Future Services Outreach.**"

8.2 All information contained in the Statement of Qualifications should be concise and responsive to the content of this request. Respondents are to:

8.2.1 Submit one (1) original and ten (10) copies of the response, and clearly label the outside of the box, package or envelope with "**RFQ – Future Services Outreach.**" The original signature version is to be clearly identified as "Original" and copies are to be clearly identified as such. **Please provide three (3) sets of work samples.**

8.2.2 Include one (1) electronic copy of the response on a CD in PDF format, including the Fee Schedule.

8.2.3 Copies shall be double-sided on 8-1/2" x 11" recycled paper.

8.2.4 All pages shall be sequentially numbered and a table of contents shall be provided.

8.2.5 The response, excluding the resume appendices, samples, sample descriptions and required attachments, **shall not exceed 30 pages maximum. (15 pages double-sided.)**

### 8.3 RFQ CONTENTS

Required documents include the following:

#### 8.3.1 COVER LETTER

A cover letter describing your firm, its history, number of years in business, and how your firm meets the desirable qualifications and has the ability to perform the scope of services shall not exceed two pages. The individual authorized to contractually bind the firm should sign the letter. Resumes for the proposed team and sub consultants, if any, should be provided as an appendix.

#### 8.3.2 QUALIFICATIONS QUESTIONNAIRE

To be considered for the communication support agreement(s), interested Proposers may respond to all of the following questions or only to the questions related to the services your agency specializes in. Proposers may submit on one, two or all three elements of the scope described in this document. Proposers will be scored on how they answer all questions that relate to the element on which they are proposing.

**For each element, responses must not exceed 10 pages total (5 pages double-sided) with a minimum 1.5 line spaces and not less than 10-point type.** Questions requesting samples and attached descriptions are excluded from this page limit.

#### Element #1 - Strategic Communications

To be considered for the strategic communications agreement, please complete the following questions.

1. Describe a strategic plan for an outreach campaign that your firm developed where your client had a defined budget, and wanted a campaign that was creative and reached a large audience. How were you able to meet the client's needs? Describe two cost-saving tactics that your firm has utilized on outreach campaigns.
2. Describe a campaign conducted by your firm where the goal was to change a behavior or habit. How did you evaluate the effectiveness of the campaign?
3. Describe a successful outreach campaign your firm developed to culturally appeal to a Spanish or non-English speaking audience.
4. What is your firm's experience with communicating to the general public on the following environmental issues? For each issue, please state the client, a one-line description of the issue, and the medium used to communicate the issue.

Environmental Issues:

- a) Solid waste reduction (e.g., composting or recycling)
- b) Resource conservation
- c) Climate change
- d) Energy conservation
- e) Other environmental issues (please list each separately.)

**For example:**

*City of Portland, Oregon- sustainability plan to reduce greenhouse gas emissions; brochures, ads, and PSAs.*

5. Describe your firm's experience and capability for using electronic media opportunities to promote customer programs or issues. This can include web design and content, advertising on the Internet, email blasts, webinars, and blogs. Please note any website links that can be visited to further evaluate your work.
6. Describe a campaign that involved a challenging timeframe and how your firm kept the project on time and within budget.
7. Please provide the following samples of your firm's work:
  - a) A sample of a strategic plan or outline
  - b) A sample of your firm's technical writing that demonstrates an ability to convey a complex subject into easily understood language
  - c) Two samples of creative collateral that helped to achieve desired outcomes
  - d) Up to two samples of any work listed under question #6

On each sample, attach a sheet entitled Element #1, indicate either by the letters above in question 7 or indicate the type of sample you're submitting, and include your firm's name. Then describe how your agency approached the project and the outcomes that relate to the piece.

**Element #2 - Media Relations**

To be considered for the media relations agreement, please complete the following questions.

1. Describe your existing network of media contacts in San Mateo County.
2. Describe how you developed a media plan for an outreach campaign that targeted a residential community. How did you evaluate the effectiveness of the plan?
3. Describe how you developed a media plan for an outreach campaign that targeted businesses. How did you evaluate the effectiveness of the plan?
4. Describe a media campaign aimed at one or more ethnic audiences. How did you evaluate the effectiveness of the plan?
5. Describe a campaign that was under a tight deadline and how you were able to execute quick placement in media channels.
6. Describe the media planning and placement tools that your firm employs.

7. Describe the largest press event that your firm has handled and include details on how you scheduled and handled associated logistics.

8. What is your firm's experience with preparing news releases and press kits on the following environmental issues? For each issue, please simply state the client, a one-line description of the issue, and the resulting media coverage earned from your efforts.

Environmental Issues:

- a) Solid waste reduction (e.g., composting or recycling)
- b) Resource conservation
- c) Climate change
- d) Energy conservation
- e) Other environmental issues (please list each separately.)

**For example:**

*City of Santa Monica, California - sustainability plan to reduce greenhouse gas emissions; 3 articles, 1 Op-ed, radio news coverage.*

9. Please provide the following samples of your firm's work:

- a) A sample of a media plan or outline
- b) A sample of a press kit
- c) Two samples of creative press releases that achieved desired outcomes.
- d) Up to two samples of any work listed under question #8.

On each sample, attach a sheet entitled Element #2, indicate either by the letters above in question 9 or indicate the type of sample you're submitting, and include your firm's name. Then describe how your agency approached the project and the outcomes that relate to the piece.

**Element #3 - Community Engagement**

The SBWMA requires stakeholder input in a variety of environmental programs. The following questions explore how your firm, or a sub consultant that you have overseen, has dealt with encouraging stakeholder input.

1. Describe a recent approach undertaken for engaging the residential community on a specific issue. How did you evaluate the effectiveness of this approach?

2. Describe a recent approach undertaken for engaging the business community on a specific issue. How did you evaluate the effectiveness of this approach?

3. Describe your firm's experience in facilitating public meetings. What is the largest sized audience your firm has facilitated? How do you handle public input in meetings that have more than 100 attendees?

4. Describe your firm's approach to capturing public input for use by decision-makers.
5. Describe your firm's capabilities for facilitating meetings that include attendees with foreign language needs.
6. What is your firm's experience with engaging a community on the following environmental issues? For each issue, please simply state the client, a one-line description of the issue, and the type of engagement and audience size that your firm handled.

Environmental Issues:

- a) Solid waste reduction (e.g., composting or recycling)
- b) Resource conservation
- c) Climate change
- d) Energy conservation
- e) Other environmental issues (please list each separately)

**For example:**

*City of San Francisco, California - sustainability plan to reduce greenhouse gas emissions; **facilitated 3 residential meetings over one year with attendance ranging from 7 to 35; facilitated 2 business meetings over one year with attendance ranging from 12 to 18.***

## **9. ATTACHMENTS**

Proposers are required to include one original and 10 copies of Attachments A-C.

**Attachment A: Proposal Certification**

FIRM NAME
ADDRESS
TELEPHONE #
FAX #
CONTACT NAME AND TITLE

**PROPOSER REPRESENTATIONS**

1. Proposer additionally certifies that neither proposer nor its principals are presently disbarred, suspended, proposed for disbarment, declared ineligible or voluntarily excluded from participation in this transaction by any federal department or agency, any California State agency, or any local governmental agency.
2. Proposer did not receive unauthorized information from any SBWMA staff member during the Proposal period except as provided for in the Request for Qualifications package, formal addenda issued by the SBWMA, or the pre-proposal conference.
3. Proposer hereby certifies that the information contained in the proposal and all accompanying documentation is true and correct.
4. Please check the appropriate box below:
  - If an individual submits the proposal, he or she shall sign it, and if he or she is doing business under a fictitious name, the proposal shall so state.
  - If the proposal is submitted by a partnership, the full names and addresses of all members and the address of the partnership shall be stated and the proposal shall be signed for all members by one or more members thereof.
  - If a corporation submits the proposal, an authorized officer of officers shall sign it in the corporate name.
  - If a limited liability company submits the proposal, an authorized officer or officers shall sign it in the corporate name.
  - If the proposal is signed by a joint venture, the full names and addresses of all members of the joint venture shall be stated and each individual shall sign it.

**Attachment A**

By signing below, the submission of a proposal with all accompanying documents shall be deemed a representation and certification by the Proposer that they have investigated all aspects of the RFQ, that they are aware of the applicable facts pertaining to the RFQ process, its procedures and requirements, and that they have read and understand the RFQ.

Authorized Representative Name (Sign name)
Authorized Representative Name (Print name)
Authorized Representative Title (Print title)
Complete additional signatures below as required per # 6 on the previous page.
Authorized Representative Name (Sign name)
Authorized Representative Name (Print name)
Authorized Representative Title (Print title)
Authorized Representative Name (Sign name)
Authorized Representative Name (Print name)
Authorized Representative Title (Print title)

**Attachment B: Reference Form- please specify any public agencies and solid waste companies that you have worked with.**

Provide reference information for the services you are proposing in a manner and environment similar in size and scope to the requirements of this proposal. Copy this form as appropriate.

**Previous Customer Reference Worksheet**

Name of Customer	
Customer Address	
Customer Contact Name(s), Address and Phone Numbers	
:	
Brief description of work performed for this client (use additional sheets if necessary):	

**Attachment C: Resumes of key account managers and personnel who would be involved in day-to-day activities. Also, please include hourly rates for each position.**

If your firm will be using subcontractors, please include a list of subcontractor's qualifications, key personnel and hourly billing rates. Describe any relevant (within the last three years) work experience of Consultant's firm with each subcontractor. Please also note any prior projects completed and/or employment history of members of your firm or subcontractors with solid waste and recycling companies.