

**The California Academy for Economic Development  
Outsmart Disaster Campaign  
Local Liaison and Implementation Partner (LLIP)**

**REQUEST FOR PROPOSAL**

**Issue date:** May 25, 2021

**Closing date and time:** June 8, 2021 by 5:00 pm

**Contact person:** Helen Schaubmayer, helen@caled.org

**A: OVERVIEW**

Getting back to work quickly after a natural disaster is not only critical to the survival of a business/organization, but also the communities in which they operate. With California's "new normal" of severe weather and the ever-present risk of earthquakes, fires, floods and mudslides, mitigation and resiliency are particularly important.

The [Outsmart Disaster Campaign](#) was designed by California's Business, Consumer Services and Housing Agency (BCSH) to communicate risks, provide resources, and call to action businesses and organizations with the goal of collectively becoming more prepared to reduce damages and speed up business recovery in California. To assist interested participants in their endeavor to become resilient, the Campaign provides business toolkits, local government resources, and partner and media resources to help change the narrative around natural disasters.

The Campaign encourages businesses to act by developing a plan to be prepared, mitigate risks, increase response and recovery. We believe that a collaboration with local governments, chambers of commerce, business associations and community organizations will help to facilitate building local support and engagement so we can get more businesses engaging in good resiliency practices.

The California Academy for Economic Development (also referred to as The Academy or the "Client"), managed by the California Association for Local Economic Development (CALED), has been designated as a Campaign partner and is responsible for overseeing successful implementation of this phase of Campaign deliverables. The Academy is a 501(c)3 non-profit with a mission focused on providing quality professional development training for economic development practitioners, supporting the profession and communities through technical assistance, and sponsoring the periodic release of key statewide economic information on emerging trends and policy issues.

With over 800 members, CALED is the largest economic development organization in California, and serves as the managing entity of The Academy. CALED is the premier statewide professional economic development

organization dedicated to advancing its members' ability to achieve excellence in delivering economic development services to their communities and business clients.

General information regarding CALED or The Academy can be found at [www.caled.org](http://www.caled.org) and [www.edacademy.org](http://www.edacademy.org), respectively.

The Academy received a grant from the United States Department of Commerce Economic Development Administration to expand upon the work initiated in the Outsmart Disaster Campaign to increase the reach to more communities statewide.

This Request for Proposal (RFP) is to select and contract with a Local Liaison and Implementation Partner (LLIP) to work with The Academy to implement the local outreach work of the Campaign and deliver on specific goals. The Statement of Work within Section E explains these in detail.

The successful consultant will be an independent contractor and will provide services for a fixed fee.

## **B: SUBMISSION REQUIREMENTS**

### **Confidentiality**

A consultant receiving this RFP may not use, disclose, or duplicate it for any purpose other than to prepare a response. The consultant shall keep the Client's data confidential and shall not disclose its content to any other party, other than to those internal employees or agents responsible for preparing a submission, without the prior written approval of the Client. Receipt of this RFP does not entitle the consultant to associate its services with the Client in any way, nor represents in any way that the Client has employed or endorsed the consultant's services. Any such association or endorsement being contemplated by the consultant must receive the prior written approval of the Client. The Client will not disclose or share one consultant's response to this RFP with other consultants or other organizations.

The submission of a proposal indicates acceptance by the respondent of all of the conditions contained in this Request for Proposal unless clearly and specifically noted in the proposal submitted and confirmed in the formal contract between the Client and the consultant. Deviations from the Request for Proposal must be clearly identified in the written submission. Proposals are subject to a formal contract being negotiated, prepared and executed. The Client reserves the right to negotiate the terms and conditions of the contract.

All documents submitted by consultants shall become the property of the Client.

## **Proposal Schedule**

All submissions must be received by 5:00 pm June 8, 2021. Submissions must not be directed to other Client employees. Clarification requests will be accepted by email.

## **Consultant Interviews**

The Client reserves the right to interview the top scoring consultants to assist in their evaluation of the proposals. If interviews are conducted, they may be conducted in person, using internet conferencing technology, or through teleconferencing at the discretion of the Client.

## **Inquiries**

Inquiries regarding this Request for Proposal are to be sent by e-mail no later than June 4, 2021 to Helen Schaubmayer, Program Manager at: [helen@caled.org](mailto:helen@caled.org).

## **RFP Submissions**

Consultants are required to submit their proposal via email clearly identified as **Proposal for Local Liaison and Implementation Partner (LLIP)** to: [helen@caled.org](mailto:helen@caled.org)

Proposals must be received at the above email by 5:00 p.m. **Tuesday, June 8, 2021** and must not be more than **7 pages**.

## **RFP Terms and Conditions**

Proposals received later than the specified closing time will be rejected by the Client and returned without review.

Final acceptance of the proposal will be subject to the successful negotiation and execution of a written contract meeting the expenditure limits and required terms and conditions acceptable to the Client. The acceptance or rejection of any proposal will be made pursuant to the policies of the Client.

## **Rights Reserved by the Client**

The Client is not liable for any costs incurred by interested parties in the preparation of their response to this Request for Proposal. Furthermore, the Client shall not be responsible for any liabilities, cost, loss or damage incurred, sustained or suffered by any interested party, prior or subsequent to, or by reason of the acceptance or nonacceptance by the Client of any response, or by reason of any delay in the acceptance of the response.

The Client reserves the right to request consultants provide additional information and address specific requirements not accurately or adequately covered in their initial submissions.

The Client reserves the right to modify any and all requirements stated in the Request for Proposal at any time prior to the possible awarding of a contract.

### **Conflict of Interest**

The consultant agrees to be bound by the following requirements. Except as identified in the proposal or as specified in the contract, the consultant must certify in its proposal:

- That no person either natural or body corporate, other than the consultant, has or will have any interest or share in this proposal or in the proposed contract.
- There is no collusion or arrangement between the consultant and any other consultant(s) in connection with this project.
- The consultant has no knowledge of the contents of other proposals and has made no comparison of figures or agreement or arrangement, express or implied, with any other party in connection with the making of the proposal.
- Consultants chosen to participate in this RFP process shall disclose prior to entering into an agreement any potential conflict of interest. If such conflict does exist, the Client may at its discretion withhold the award of a contract from the consultant until the matter is resolved.
- Neither the consultant, nor any employee of the consultant, shall offer or receive any entertainment, gifts, gratuities, donations, discounts, fees, payment, commission, reward, special service, incentive, or other remuneration or compensation of any kind (“inducement”), regardless of value, related to this RFP. The consultant agrees to inform the Client immediately upon being offered any such inducement.
- Consultant warrants and represents that it is familiar with the provisions of Assembly Bill 5 (AB5) passed by the California legislature in September 2019 and understands they will meet the definition of an independent contractor.

The successful consultant shall continue to be bound by the foregoing prohibitions after the execution of a contract agreement.

The intent of this requirement is to ensure that each party is able to perform its duties and responsibilities free and clear of any actual or potential conflict of

interest brought about by business or personal interest that might be in conflict with the best interest of the Client.

### **Future Agreement**

There shall be no implied term that the lowest proposal will be accepted nor that if any proposal is accepted, that it will be accepted and a contract entered into on the exact terms submitted. The Client shall be free to accept a proposal, if a proposal is accepted, that it deems to be in the overall best interest of the Client and shall also be free to negotiate with any or all consultant's amendments to the prescribed work for any reason whatsoever, including, but not limited to, seeking cost savings or improvements to the final product as required or requested by the Client.

Notwithstanding that, the Client retains the right to cancel the work; it is the intent of the Client to enter into a contract with the successful consultant to provide marketing support, local community outreach and education, and to help local leaders enroll businesses in the Outsmart Disaster Campaign.

Consultants agree to be bound by the terms and conditions of this RFP and to the services listed at the prices and rates quoted. If a contract is issued, the successful consultant will be bound by and comply with the terms and conditions contained in the contract and the RFP and any other terms or conditions negotiated by the parties which will constitute the full and complete agreement between the parties.

### **Budget**

The budget for the designated scope of work is \$60,000 from July 2021 through December 2021 (6 months).

### **C: PROPOSAL FORMAT**

The Client is seeking proposals from consultants who are both interested and capable of undertaking the project. The onus is on the consultant to show their knowledge, understanding, and capacity to conduct the work outlined in this Request for Proposal.

The responses will be assessed according to how well they assure the Client of success in relation to the submission requirements. The detail and clarity of the written submission will be considered indicative of the consultant's expertise and competence.

### **Section 1: Overview**

A narrative demonstrating the firm or individual's understanding of the full Scope of Project and services required by this Request for Proposals.

## **Section 2: Experience & Capability to Deliver**

Demonstrate that the consultant has the qualifications, capability, capacity, and experience to provide the services required of this RFP.

Describe your experience as it relates to this project. Provide resumes for all members of the project team, firm, or individuals working on the project, clearly indicating experience, education, qualifications, and professional affiliations.

The successful consultant should have experience in program/project management (including appropriate record-keeping and reporting); identifying and working collaboratively with stakeholders, businesses, and other community leaders; developing and managing multiple working groups concurrently; promotion and marketing of programs to gain community support and involvement; and running community engagement meetings or workshops.

Provide at least three references, including a description of the project or affiliation as well as the client/reference name and contact information.

## **Section 3: Fee**

Keeping our budget in mind, provide a fixed fee to complete all of the work noted in the RFP.

The consultant's fee should include the consultant's labor, travel, and administrative costs, but not include costs associated with supplies such as paper, files, etc.

Pricing should include a detailed summary of all fees and expenses. Please indicate the total hours each project member will commit to the project and the hourly rate for each.

## **D: PROPOSAL EVALUATION**

A committee will evaluate proposals. By responding to this RFP consultants agree to accept the recommendation of the committee as to the successful consultant and acknowledge and agree that the Client makes the final decision.

The proposal will be evaluated against the following criteria:

Section 1: Overview 20 points

Section 2: Experience & Capability to Deliver 30 points

Section 3: Fee 25 points

Total possible: 75 points

## **E: SCOPE OF WORK**

### **Contracting**

- In the initial contracting phase, selected consultant must create a strategy for outreach with metrics to include items not identified in this scope of work.
- As funds are available through the budget in this grant, support The Academy in the drafting of Statements of Work to secure any contracted services or support.

### **Campaign Content**

The Academy is contracting with an agency to further develop branding, marketing, and appropriate communications (Creative & Digital Partner) to support the LLIP's outreach efforts. The LLIP will be responsible to:

- Work with The Academy to determine order and timeline for outreach and trainings. The Campaign will be organized by creating geographical region areas with focus on counties which have not yet been targeted in previous Campaign outreach and group into specific CEDS areas.
- Create an outreach strategy and timeline to connect with key trusted communication contacts at the local level across the state. Some of these items can include:
  - Determine format of trainings with particular focus on developing "train the trainer" events.
  - Distribute electronic curriculum to regional partners/leaders (businesses, local networks, local partners) at the frequency established by Creative & Digital Partner.
  - Distribute regular emails written by Creative & Digital Partner to regional partners/leaders and listservs.
  - Promote and amplify regular monthly social media posts written by Creative & Digital Partner for a statewide audience, focused regions, and listservs.
  - Reach out to local/regional public and regional transit agencies to determine how they provide Public Service Announcements (PSAs) in their communities. Check for feasibility to include the Outsmart Disaster Campaign in local/regional PSAs.
  - Determine needs for additional software licenses, listservs, and programs based on identified technological upgrades.
  - Create content for curriculum that will be rolled out to each geographic region partners/leaders.

- Participate in scheduled meetings with Partners, Donors, Advisory Council Members or other key stakeholders.
- Plan and budget for calls/meetings with The Academy and Creative & Digital Partner on project status, strategy and implementation.
- Identify additional features, tool-sets, and technological upgrades that would be helpful for the Campaign. Provide these solution ideas to The Academy who will determine if the work can be completed in the current funding cycle or if additional resources are required. [Technological upgrades may include items that facilitate increased user experience, offer real-time support features, set up data analytical features to capture data and use trends, and increase administrative efficiencies for campaign team members.]

### **Campaign Reporting**

- Create a reporting list that shows all information that will be collected as part of establishing local partnerships, networks and implementing the curriculum and training events.
- Provide monthly reports to The Academy for their use in continuously improving the Campaign. Information should include metrics gathered from direct implementation work as well as analysis on which techniques and strategies are supporting the Campaign goals.
- Provide summarized quarterly data (metrics, accomplishments, and lessons learned) to be used in the Progress Reports to EDA, annual report to Campaign Advisory Council, as well as the reporting requirements to Campaign Donors.

### **Campaign Implementation**

- Create final metrics and timeline for approved strategy under Campaign Content as well as implementation plan.
- Work with The Academy to identify the leaders of communities to engage with for train-the-trainer events.
- Establish the following relationships in each community:
  - Local Governments (as relevant): Mayor, City/County Council, Emergency Manager, Chief of Police, Economic Development Manager
  - Local Networks (goal of 4-5 partners per city): Economic Development Corporation, Economic Development District, Chamber of Commerce, Small Business Development Center (SBDC), Ethnic Chambers, Volunteer Organizations, Alternative

Business Lenders (Community Development Financial Institutions, Federal RLF Operators), Relevant Community Based Organizations, etc.

- Business Lead: Local company with established resiliency / business continuity practices that can host workshops, convene companies, serve as a peer mentor.
- As needed, conduct trainings in appropriate delivery format (virtual, in-person) with designated audiences. Engage The Academy in outreach and training efforts.
- Develop targets to reach the following-metrics each quarter:
  - Add 200 businesses to Outsmart Disaster listserv (those that have signed up for emails, downloaded toolkits, accessed training, or completed the resilient business challenge)
  - 20 of these businesses should have completed the resilient business challenge
- Manage the flow of communications created by the Creative & Digital Partner to the local networks. Field questions and support businesses as they engage with the curriculum.
- Monitor the progress and participation made by businesses and other organizations within the geographic focus area. Problem solve and adjust to reach target goals of numbers of business that sign up, stay engaged, complete the Resilient Business Challenge.
- Establish and add to a Listserv (excel format) of local contacts engaged, with their contact information and engagement outcomes. Maintain the listserv quality and appropriate contact information.

### **Deliverables Schedule**

- Upon being awarded the contract, develop a deliverables calendar that clearly shows completion dates of the deliverables outlined in the statement of work and strategy both to be included as addendums to the contract. This calendar will be approved by The Academy and will be used to facilitate monthly invoicing.

### **PERIOD OF PERFORMANCE**

- Base: 6 Months (July 1, 2021 – December 31, 2021)
- Additional 6 Months: May be added if expanded outreach and scope of work is confirmed (January 1, 2022 – June 30, 2022) A new contract would be executed and modified.