



PUBLIC RELATIONS REQUEST FOR PROPOSAL

Release date: November 8, 2013

Due Date: December 6, 2013

I. Wilson Foundation Overview

The Marie C. and Joseph C. Wilson Foundation (Wilson Foundation) is a Rochester, New York based family philanthropic foundation founded in 1963 by Joseph C. Wilson, founder of the Xerox Corporation, and his wife, Peggy. The primary goal of the Wilson Foundation is to act as a catalyst for change. Our mission is to improve the quality of life through initiating and supporting projects that measurably demonstrate a means of creating a sense of belonging within the family and the community.

II. The SHIFT Study

In 2007 the Wilson Foundation partnered with the National Center on Family Homelessness to conduct The Services and Housing Interventions for Families in Transition (SHIFT) Study, comparing the characteristics and outcomes among families in three different types of housing programs: emergency shelters, transitional housing, and permanent supportive housing.

Baseline, 15-month and 30-month follow-up interviews were conducted with residents from each type of housing program in Buffalo, Rochester, Syracuse and Albany. The interviews addressed the following topics: housing, employment, income, health, trauma experiences, mental health and substance abuse issues, services and children.

The overall goal of the SHIFT study was to document the needs of program participants, and understand the effectiveness and costs of different housing programs and related services for various subgroups of families. The report can be found at

<http://www.familyhomelessness.org/shift.php?p=sm>

III. Scope of Work

The Board of the Foundation seeks to partner with a communications firm that can help us plan and execute a multi-tiered dissemination strategy to promote the findings of the SHIFT study. No study of this longitudinal nature has ever been conducted in the Family Homelessness space and we feel the findings are tremendously important in effecting near term change both at a local application and national policy level.



We are looking for a top rate PR partner who will help us lead efforts to reach target audiences and achieve specific, measurable goals [to be] outlined in the SHIFT Study dissemination strategy.

Three Main Communication Objectives:

- **LOCAL / ON THE GROUND:**
 - **OBJECTIVE:** To develop a communications strategy in EACH of the four cities involved in the SHIFT Study – *Buffalo, Rochester, Syracuse and Albany* - to generate awareness of and gain feedback from targeted audience groups (providers; stakeholders; funders) about the SHIFT Study. Public Forums were held in each city in May 2013.
 - **Goal** = Recruit public forum participants to partake in feedback focus groups which will help guide a new funding/target strategy for the Wilson Foundation
 - **Goal** = Create advisory groups in each city to continue the work on their own
 - **OBJECTIVE:** Pitch local media outlets, e.g., TV, Radio, Blog, Newspaper, in the four cities for press about the study and the focus groups (to be determined together, i.e., create a local PR target list)
 - **Goal** = Gain media exposure on a local level in relevant outlets regarding SHIFT study results and community needs
 - **Target Audience:** Local providers, stakeholders, public officials, funders
- **NATIONAL / PARTNERSHIPS / PRESENTATIONS / MEDIA PLACEMENTS:**
 - **OBJECTIVE:** To engage funders and affiliate groups in conversations about the data.
 - **Goal** = Raise awareness among national level funders and organizations
 - **OBJECTIVE:** To create partnerships with other organizations with strong national connections
 - **Goal** = Establish national level partnerships with a wide reach to continue to disseminate the study's data/findings
 - **OBJECTIVE:** To present and/or participate at national conferences and other relevant conferences,
 - **Goal** = Expose policy makers, funders, stakeholders, and providers to the SHIFT study data and establish new connections and grow our network to which we can make aware of the Study
 - **OBJECTIVE:** Pitch the SHIFT Study results / Wilson Foundation to relevant national media outlets, e.g., blogs, online outlets, magazines and newspapers (to be determined together, i.e., create a national PR target list)
 - **Goal** = Gain media exposure on a national level in relevant outlets



- **Target Audience:** National providers, organizations, policy makers, and funders
(Funders Together To End Homelessness; Grantmakers for Effective Organizations; Grantmakers for Children, Youth and Families; Council on Foundations, MacArthur Foundation; Annie E. Casey; Butler Family Fund; Gates Foundation)
- INTERNAL / SOCIAL MEDIA CONSULTATION / PRESS KIT:
 - OBJECTIVE: To create and consult on a new social media strategy that supports and promotes the SHIFT Study dissemination efforts
 - **Goal** = Establish a stronger social media presence among the thought leaders and information seekers in the Family Homelessness space.
 - *How can we leverage Facebook, Twitter, and our New Blog to not only disseminate the SHIFT Study data BUT more importantly, continuously engage in the important conversations, create the conversations and connect with our target audience groups on an on-going basis?*
 - OBJECTIVE: To create a digital [and print friendly] press kit for the Wilson Foundation AND the SHIFT Study (study summary, quick stats, info graphics)
 - **Goal** = Have a digital press kit available for download on our new website, able to send to all inquiries and for PR firm to use to “pitch” outlets.
 - **We NEED a new, crisp “About Wilson Foundation” for all digital and print purposes. Work with ED and Executive Board to finalize this statement.**

Not in Scope at This Time:

- Social media activity – our Executive Director will perform social media outreach to support the PR plan. However, we do expect the *planning* of this to be done together
- Branding
- Website Audit – *We are currently undertaking a major website redesign process with a development firm; however, we may seek your feedback with regard to certain website information architecture features in order to support PR efforts.*
- Event planning (unless it is already in scope for your typical retainer)

III. Proposal

One of our top priorities in selecting a firm is to ensure that our expectations and the way we work meshes well together. We propose the following next steps to finalizing the right fit for both parties:



- 1) Provide a proposal that includes all requested information under “Company Information” as well as responses to the additional questions below
- 2) Have a call with the Wilson Foundation to talk through submitted proposal and to cover additional questions. We will structure this call much like an interview, as we look at hiring our PR firm as an extension of our Foundation, much like hiring an employee.

Company Information

- The company name, account point person, mailing address, telephone number, fax number, email address and website;
- A concise description of Respondent’s principal business including company background, characteristics of business strength, and products and services offered – *Your core business MUST include a strong non-profit focus.*
- A discussion of Respondent’s experience in providing deliverables similar in size, complexity and nature to those requested in this RFP.
- Links to examples of Respondent’s similar work in the non-profit sector.
- At least two (2) references for similar non-profit projects completed by the Respondent, including name of organization, name of contact person, address, telephone number and email.

Kickoff & Planning

- What are the first steps you take when bringing on a new client?
- What is your process for creating a mutually agreed upon plan?
- Is there a separate fee for planning?

Strategy

- We are looking to ramp up our PR efforts quickly. Describe how you would procure media placements and/or speaking engagement/panel opportunities in a 1 – 3 month time horizon?
- What would be your top 5 most important media targets for the Wilson Foundation / SHIFT Study based on the objectives above? Why?

Account Team

- Describe the members of our account team and who is doing what? Specifically who is on status calls? Who is actually doing the work? Who is developing strategy? Etc.
 - ***Provide bios / experience of those team members***

Management, Reporting & Communication

- How do you plan your monthly / weekly activities and ensure they are in alignment with the strategy?



- How do you communicate to your clients status and progress? Weekly calls? Daily emails?
- What do you do to help your clients build media and partner relationships?
- How do you coordinate with the client to ensure they are doing what they can internally? (e.g. social media outreach)

ROI / Performance Orientation

- What metrics do you put in your plan for us to mutually measure success?
- What metrics do you like to track to judge success of specific activities?

Financials & Contract

- What is included in your monthly fee?

Evaluation Criteria

The Respondent whose credentials, experience and proposal best meets the Wilson Foundation's needs will be selected.

- Thoroughness of proposal
- Demonstrated understanding of the purpose and desired outcomes of this project
- Experience and success in the non-profit sector
- Quality of samples provided
- Interviews will be required as part of the review and selection process

The Board reserves the right to reject all submittals.

VI. Contact Information

Megan Bell, Executive Director
Email: mbell@wilsonfdn.org
Phone: 585-461-4696

Restrictions and Additional Considerations

Proposal Binding - by signing and submitting its proposal, each respondent agrees that the contents of its proposal are available for establishment of final contractual obligations for a minimum of 30 calendar days from the application deadline for this RFP. A respondent's refusal to enter into a contract which reflects the terms and conditions of this notice of contract opportunity, at the Board's sole discretion, result in rejection of respondent's proposal or termination of any negotiations with the respondent.