

**Castaic Lake Water Agency
Public Relations Consultant**

**Request for Proposal
February 2010**



Proposals will be received until 3:00 p.m., Thursday March 18, 2010

**Castaic Lake Water Agency – Administration Building
27234 Bouquet Canyon Road, Santa Clarita, CA 91350**

CLWA

REQUEST FOR PROPOSAL

Public Relations Consultant

Firm: _____

Contact Person: _____

Address: _____

Phone: _____

Fax: _____

E-mail Address: _____

CLWA

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1. DESCRIPTION OF CLWA AND PROJECT:

ABOUT CLWA

The Castaic Lake Water Agency (CLWA) is a public water agency that serves an area of 195 square miles in Los Angeles and Ventura Counties. CLWA is a water wholesaler that provides over half of the water used by Santa Clarita Valley (SCV) households and businesses. The stated mission of CLWA is to provide reliable, quality water at a reasonable price to the Santa Clarita Valley. CLWA operates two treatment plants, two pump stations, two storage facilities and over 17 miles of transmission pipelines. CLWA supplements local groundwater supplies with State Water Project water from northern California and other sources. This water is treated and delivered to the local water retailers. The four retail purveyors served by CLWA are: Los Angeles County Waterworks District #36, Newhall County Water District, Valencia Water Company and a division of CLWA, the Santa Clarita Water Division. More information can be found on the current web site www.clwa.org.

The Santa Clarita Water Division (SCWD) of the CLWA provides retail water services to households and businesses in Saugus, parts of Canyon Country and parts of Newhall. The SCWD provides retail service 24/7 which includes customer account service, maintenance and emergency repairs. There are currently 28,175 connections being served by the Santa Clarita Water Division. SCWD has recently developed a website (www.scwater.org) to help disperse information about their retail services.

CURRENT PUBLIC RELATIONS ENVIRONMENT

CLWA participates in high profile public events in the SCV (Emergency Expo, Lexus Jazz and Blues Concert Series, annual Open House, Arbor Day, etc.). CLWA holds a very popular open house during Water Awareness Month (May) each year that highlights water issues and includes the local retail water purveyors and other organizations. CLWA has recently prepared a Facebook page (www.facebook.com/castaiclakewateragency) to provide customers with more timely information from numerous sources related to water supply.

Additional programs run by staff include organizing and attending events offsite and at CLWA facilities; coordinating marketing booth schedules for CLWA employees; maintaining mailing lists, drafting content for outreach materials, implementing water conservation programs and administering the CLWA bottled water donation program.

All of CLWA's employees are committed to providing safe and quality water to the Santa Clarita Valley. However, when people see CLWA in the news, it tends to be regarding water shortage threats, "no-growth" litigation or rate increases. The residents don't always connect the good work that the employees do throughout the Valley with the organization they see in the news. There is currently a management-level position of Water Resources Manager who, among other duties, serves as the Public Information Officer and oversees the School Education Program. Additionally, an Event Coordinator is responsible for coordinating, organizing, and attending community and CLWA events; representing CLWA to public and external organizations; coordinating the use of CLWA facilities; overseeing the landscape education program; and assisting with CLWA's public outreach and education activities. CLWA has a separate agreement with an independent contractor for the local branding of the Agency.

For the past two years, CLWA has used a consulting firm to prepare a public relations plan, analyze the public's perception of CLWA and implement the outreach and public relations plan. CLWA now seeks consultant help to design and implement a redefined outreach program with an emphasis on the social marketing of a water use efficiency theme for 2010.

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2. SCOPE OF SERVICES

INTRODUCTION TO THE PROJECT

CLWA is requesting proposals from experienced public relations consultants to provide social marketing services for a minimum one-year public outreach campaign that highlights the benefits of water conservation and the public services CLWA and SCWD perform to meet water use efficiency goals. Emphasis will be on the need for and opportunities to conserve water and the availability of CLWA sponsored water conservation programs. The scope of work is a social marketing effort to complement the Agency's ongoing branding efforts. Proposals should be submitted as described in this document.

THE PROJECT

CLWA would like a one-year public relations campaign that highlights the need for conservation and the availability of conservation programs. Secondly, the work scope would complement the outreach effort describing the services and benefits the CLWA provides through the Valley. This campaign would "link" the various public information work that is currently being done with the social marketing effort. This campaign would aggressively notify the public of conservation programs and rebates, plan out the quarterly newsletters, help in preparing the annual water quality report, and other related items as well as seeking creative new ways to get these messages to the customers.

Themes that CLWA wants to highlight include:

- CLWA is aggressively pursuing water use efficiency.
- CLWA is required by recently passed state law to achieve a ten percent reduction in per capita water use by 2015 and a twenty percent reduction by 2020.
- CLWA is generously offering rebates and educational assistance to achieve water use efficiency goals.
- CLWA's reputation in the community is one of high integrity.
- CLWA is a good neighbor and is committed to enhancing the community's quality of life and protecting the local urban environment.
- CLWA is protective of natural resources.
- In concert with the local retail purveyors, CLWA provides highly reliable and safe water for the Valley.
- In concert with the local retail purveyors, CLWA is committed to water use efficiency.
- In concert with the local retail purveyors, CLWA has generous water conservation programs.
- In concert with the local retail purveyors, CLWA protects the water quality of the Santa Clara River and local groundwater basins.
- CLWA proactively works with the retail purveyors to accomplish integrated regional water management.
- CLWA is a premier partner with other government agencies in planning for the Valley's future.

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A qualified public relations firm will be hired through a proposal process to perform the one-year PR campaign. The tasks would include, but not be limited to:

- Survey the Board of Directors and approximately five employees about the conservation message they want to portray.
- Plan for the year, compile possible article topics and assist staff in editing final content and preparing the graphic design for *Water Currents*, the quarterly CLWA public newsletter.
- Review CLWA's approach to press releases to ensure that impacts to the Santa Clarita Valley are effectively communicated.
- Review CLWA's current informational brochures and promotional materials. Update and suggest new materials as appropriate.
- Review, update and prepare CLWA's Annual Water Quality report, perhaps in a new format.
- Review CLWA's annual Open House, participation in public and community events and provide suggested changes, as appropriate, to enhance a conservation message.
- Verify that CLWA's website, Facebook page and SCWD's website effectively complement the social marketing campaign, accentuate CLWA's conservation programs and provide suggested changes as appropriate.
- Suggest other outreach activities that could help CLWA's campaign – public access television, movie theater ads, etc.
- Develop a media and public events campaign for water use efficiency and effectively promote water conservation programs offered to the public.
- Develop an outreach campaign for the implementation measures in the Santa Clarita Valley Water Use Efficiency Plan.
- Develop performance measures to gauge effectiveness of the above efforts.
- Develop an outreach campaign to educate the public on the 2010 State Water Bond Initiative.
- Develop radio ads and tags that are a part of CLWA sponsorship of local radio station KHTS' Non-Profit Spotlight program.

3. COST PROPOSAL BID

COST PROPOSAL

Each proposer shall clearly state the total cost as well as appropriate subtotals. Clearly define costs for individual elements, such as printed materials, advertising, marketing and other such items. Do not submit more than one cost proposal. The cost proposal shall include all general costs associated with the work required under this RFP. The cost proposal shall include a summary of costs by major task or project phase, including subtotals and totals. In the event of any unforeseen additional tasks all proposers shall include a schedule and fees including but not necessarily limited to hourly rates, service charges and expense charges.

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4. SUBMITTALS

PROPOSAL INFORMATION

The information to be covered in your proposal is described in detail in this section.

EXECUTIVE SUMMARY

This should include a brief description of the proposer's program approach and an introduction of the program team.

FUNCTIONAL REQUIREMENTS

This section shall include the technical information about the proposer's program approach. Clearly define the scope of work and approach to accomplish the work. This section should discuss all technical information, including media utilized, graphic design and printing schemes. This section should discuss any and all information that will be required from CLWA and SCWD. Items to be covered include:

- ◆ The overall scope and approach to implement the public outreach program.
- ◆ The process by which CLWA staff would participate in the development of outreach materials.
- ◆ Descriptions of various marketing tools to be utilized in the program.
- ◆ The generation of statistical information on market penetration.
- ◆ The documentation of the program, such as progress reports.

PROJECT TEAM EXPERIENCE

This section shall include a description of the proposer's company and key staff. Clearly state the organizational structure of the team, and include resumes for all key personnel assigned to the project. List the qualifications of the program manager, who will be the primary point of contact with CLWA during the life of the contract. Substitution by the successful proposer of key staff, including the program manager, shall not be allowed without prior written approval by CLWA.

PROJECT TASK SCHEDULE/APPROACH

Clearly define the scope of work and approach to accomplish the work. Proposers must define the tasks, resources, sequence, task durations, communications/feedback, customer approvals, and all other relevant steps, contingencies and milestones that would be followed to achieve the stated results of this RFP.

QUALIFICATIONS AND REFERENCES

Describe the experience and abilities in completing similar work, including at least three different client references from a minimum of three different projects within the past five years. Each reference should include the client name, number address, name and description of the project, date the project was accomplished, term of the project, the original project budget, the final project cost and a current phone number for the reference, as well as a list of example links to client websites, or a portfolio of materials produced for reference clients. Emphasis should be placed on work performed for agencies with similar responsibilities as CLWA.

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EVALUATION OF PROPOSERS

The proposal evaluation will commence following the RFP closing date. The evaluation process is expected to be completed within approximately 60 working days. Proposers will be notified via U.S. mail or e-mail regarding status of the proposal process.

The evaluation will include analysis of qualifications, experience, cost effectiveness, scope of work, project task schedule and references. CLWA may select the qualified proposer based solely on the submitted proposal. Following the submission of proposals, CLWA may develop a short list of the most qualified proposers, and may elect to hold interviews with those proposers. Such interviews would require the proposers to prepare an oral presentation or present materials to further clarify the proposals. CLWA would require that the Program Manager provide the oral presentation. Selected proposers would be notified in writing to appear for an interview.

A proposer may be selected for further negotiations regarding the agreement's terms and conditions. If satisfactory agreement provisions cannot be reached, then negotiations may be terminated. CLWA may then select another firm for agreement negotiation. This sequence may continue until an agreement is reached.

PROPOSAL AMENDMENTS AND CLARIFICATIONS

Proposers are encouraged to carefully review the RFP in its entirety prior to submitting a proposal. CLWA may amend the Request for Proposals (RFP), and would do so by issuing a Notice of Amendment to all proposers. Proposers may only modify proposals if the modifications are received before the deadline for submission of proposals.

Proposers requesting clarification pertaining to this RFP must submit all requests 3:00 p.m. on March 10, 2010, to Dirk Marks at dmarks@clwa.org or (661) 513-1297. CLWA reserves the right to choose whether or not to answer any questions related to this RFP. If CLWA responds to any questions, the information will be transmitted primarily by e-mail in the form of an amendment to the RFP. The information would be presented to all firms that received a copy of the RFP.

PROPOSAL FORMAT

Proposals must be clear, accurate and comprehensive. Excessive or irrelevant materials will not be favorably viewed.

Proposers must submit four (4) hard copies and one electronic copy (in a pdf file) of the proposal to CLWA, at the required address. Proposals shall be three-hole punched in a three-ring binder.

Proposals shall be organized, tabbed and numbered in the following order:

1. Cover letter
2. Executive summary
3. Functional requirements
4. Program team composition (including titles) and experience
5. Program task schedule/approach
6. Cost proposal
7. Qualifications and references
8. Work samples

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STANDARD CONTRACT AND INSURANCE PROVISIONS

The successful bidder will be required to enter into a contract with CLWA and provide proof of insurance as shown in the CLWA Standard Contract in Attachment A.

6. RESPONSE DEADLINE

PROPOSAL SUBMISSION

Proposals may be considered non-responsive if they are not complete, do not include all required materials or do not follow the required format. CLWA is not responsible for proposals that are lost, damaged, mislabeled or otherwise are not received at CLWA headquarters by the deadline.

All documents submitted in response to this RFP will become the property of CLWA. Only written proposals will be considered. The proposer must submit an original and three (3) copies of the proposal. The proposer should include a contact person and that person's e-mail address in the proposal. The original proposal along with three (3) complete copies and one electronic copy must be delivered no later than 3:00 p.m. on March 18, 2010 (PST) to the following address:

Castaic Lake Water Agency
27234 Bouquet Canyon Road
Santa Clarita, CA 91350-2173
Attn: Dirk S. Marks

Persons who hand deliver applications shall be issued a "Notice of Receipt of Application". All applications submitted will be marked with the time and date. Timely submission of proposals is the sole responsibility of the proposer. All proposals delivered after 3:00 p.m. on March 18, 2010 will be returned to the proposers. CLWA reserves the right to determine the timeliness of all applications submitted. CLWA reserves the right to reject all proposals.

Attachments

- ◆ Attachment A – Standard Contract and Insurance Provisions
- ◆ Quarterly Public Newsletter – Water Currents
- ◆ Landscape Education Program Brochure
- ◆ 2009 Annual Water Quality Report

Recommended Reading: See the CLWA Website (www.clwa.org) for additional information including the FY 2009/10 Budget and the Santa Clarita Valley Strategic Water Use Efficiency Plan.

CONTRACTOR/CONSULTANT REQUIREMENTS CASTAIC LAKE WATER AGENCY (CLWA)

General – CLWA may enter into agreements for services or supplies to accomplish the agency's work goals. The following requirements are required of contractors/consultants. "Contractor" may mean vendor, supplier, lessee, concessionaire, etc. The type of contract, term, amount, authority and responsibility is determined by Castaic Lake Water Agency.

Basic Contractors/Consultants Requirements (refer to specific Contract, RFP, RFQ, IFB for detail insurance requirements)

1. **Contractors** – Contractors working for Castaic Lake Water Agency, (CLWA), must provide a copy of a valid and applicable Contractors License; issued by the Contractors State License Board which has jurisdiction to investigate complaints against contractors if a complaint is filed. The applicable license will be subject to the Scope of Work.
2. **Consultants** – Consultants working for Castaic Lake Water Agency, (CLWA), must be duly licensed to practice in the State of California and must provide a copy of a valid California Business License.
3. **Certificate of Insurance** – Contractor/consultant must provide to (CLWA) an original "Certificate of Insurance" of not less than \$2,000,000 for General Liability coverage; \$1,000,000 for Automobile Liability Insurance if the use of an automobile is involved. Certificate shall name Castaic Lake Water Agency as additional insured using ISO endorsement CG2010, CG2033, or equivalent. CLWA requires 30 days (10 days for non-payment of premium) notice of cancellation to CLWA. Coverage is to be placed with a carrier with an A.M. Best rating of no less than A-:V11, or equivalent.
4. **Workers Compensation Insurance** – Contractor/consultant must provide to CLWA an original "Certificate of Insurance" for Workers' Compensation coverage, unless services are provided by a sole proprietor with no employees.
5. **Expiration of Insurance Coverage** - If any of the required coverages expire, original renewal certificate(s) including the General Liability additional insured endorsement shall be delivered to CLWA at least ten (10) days prior to the expiration date.
6. **Standard Contract and Risk Transfer Provision** - In addition to the above, contractor/consultant will be required to enter into a contract with CLWA.

Glossary of Insurance Terms

A.M. Best Company – a rating agency which reports on the financial condition of insurance companies. Best ratings can be obtained by accessing the A.M. Best website at: www.ambest.com

Additional Insured – a person or organization, other than the named insured, that is also protected under the terms of the insurance contract. Additional insured's are added by endorsement to general liability insurance policies.

Certificate of Insurance – a form which verifies that an insurance policy or policies have been written. It provides general coverage information but confers no rights. The Certificate of Insurance shows limits and types of coverage, policy numbers etc.