Request for Proposal (RFP) for Communications Assessment

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Organization Overview

Mission
The Mission of the Chinatown Community Development Center (CCDC) is to build community and enhance the quality of life for San Francisco residents. We are a place-based community development organization serving primarily the Chinatown neighborhood, and also serve other areas including North Beach and the Tenderloin. We are a community development organization with many roles - as neighborhood advocates, organizers and planners, and as developers and managers of affordable housing.

We believe in a comprehensive vision of community, a quality environment, a healthy neighborhood economy, and active voluntary associations. We are committed to the empowerment of low-income residents, diversity and coalition building, and social and economic justice.

Values
The values of respect, compassion, empowerment, and teamwork represent the core principles we stand for and believe in at Chinatown CDC. Ours is a place-based organization that treats each person with compassion and respect. We build a powerful coalition of advocates and supporters who contribute their own voices in the community. We strengthen community through teamwork and encourage people to learn, and to share ideas and knowledge across all communities and within Chinatown CDC.

Project Purpose and Goal
CCDC is seeking proposals from qualified consultants for the assessment of current communications infrastructure, including systems, tools, staffing, structures, policies, and processes.

The goal is for the assessment to strengthen CCDC’s communications efforts to improve its advocacy, marketing, branding, fundraising, and outreach.

Scope of Work
Summary
The successful proponent would perform and report on an in-depth assessment and analysis of the current communications infrastructure at CCDC. It is expected that the analysis will reflect best practices pertaining to the non-profit, social services sector and how best to integrate existing and new communications systems, tools, staffing, structures, policies, and processes.

The successful proponent would provide recommendations for improvements. The recommendations should be supported with comparison to other organizations (preferably non-profit, social service organizations) of similar complexities and size. Each recommendation should include viable options and pros and cons of each option. The plan must prioritize projects and estimate implementation costs and timeframes for recommended changes.

CCDC anticipates that, at minimum, the project will include the activities outlined in this scope of work. However, proponents should propose a project plan and activities they believe will most effectively meet the project purpose.

Communications Assessment
The successful proponent will conduct a communications assessment and offer preliminary recommendations to address immediate, short- and long-term vulnerabilities and needs. The successful proponent will then facilitate a process to review the recommendations with CCDC.

The successful proponent will conduct a communications assessment that includes but is not limited to the following areas:
a. An evaluation and review of current CCDC internal and external communications strategies, services, and methods including:
   i. Social media channels (i.e., Facebook, Twitter, LinkedIn, Instagram, WeChat, YouTube;  
   ii. Website, use of website technologies and observations on its web design;  
   iii. Marketing efforts and strategy such as earned and paid media, press releases, events;  
   iv. Branding and on brand representation through its communications;  
   v. Internal communications strategies;  
   vi. Crisis management strategy and procedures;  
   vii. All other communications tools, policies, handbooks and guidelines.

b. Assess organizational capacity and coordination for maintaining and enhancing communications efforts.
   i. Communications staffing structure and resources required to support the communications needs.

c. Comparisons with other comparable organizations and best practices, if applicable.

d. Conduct department level interviews with Directors and staff to discuss and document how each department approaches communications.

e. Conduct interviews with select external stakeholders on their viewpoints on CCDC communications with observations on CCDC’s strengths and weaknesses.

f. Develop a written report that includes:
   i. Observations on the effectiveness of current capabilities and practices;  
   ii. Analysis of Communications staffing structure and resources including strengths, gaps, and vulnerabilities;  
   iii. Analysis of Communications role in the organization and recommendations on future Communications strategy and Communications role;  
   iv. Recommendations for changes in current practices, organizational structure, mediums currently in use and new mediums to enhance overall communications efforts. Recommendations should maintain the responsiveness of CCDC messaging and address CCDC’s communications needs;  

g. Presentation to senior management on the findings of the assessment.

h. Presentation to the Board, if requested.

Tasks undertaken by the consultant will include but are not limited to the following:

- Read and understand CCDC’s Mission and Goals.
- Interview key CCDC staff and management, Executive Team, and other stakeholders.
- Research, compare and provide examples of Communication systems, structures, processes and strategies of organizations similar to CCDC.
- Review and validate information on infrastructure and systems from sources such as previously completed Communications assessments.
- Regular updates on work progress.

The successful consultant will support CCDC in reviewing and understanding the findings from the assessment as well as the recommendations. The consultant will facilitate discussions with the CCDC staff, Director of Operations, and the CCDC Executive Team in order to agree upon the key recommendations.

RFP Timelines

The RFP process will be implemented according to the following schedule. Although every attempt will be made to adhere to the schedule, CCDC reserves the right to modify or alter any or all of the dates at its sole discretion.

<table>
<thead>
<tr>
<th>RFP Issue Date</th>
<th>June 23, 2023</th>
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<tbody>
<tr>
<td>Last Day for Questions from Proponents</td>
<td>July 17, 2023</td>
</tr>
<tr>
<td>RFP Close Date</td>
<td>5:00PM PST on July 28, 2023</td>
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</table>
Interviews and Presentations  Week of August 7, 2023
Selection  August 18, 2023
Desired Project Start Date  September 1, 2023

All questions and requests for additional information regarding this RFP must be received in writing by CCDC via email before 5 p.m. PT on July 17, 2023. CCDC reserves the sole right to determine the timing and content of the responses to all questions and requests for additional information.

Responses will be posted on the RFP web page. Please note that it is the responsibility of the Applicant to periodically check the web page for updates.

Questions and requests for additional information must be submitted in writing to:
Jamie Noh, Communications Specialist
E-mail: rfp@chinatowncdc.org

Proposer must submit all required documents to rfp@chinatowncdc.org by 5:00 PST on July 28, 2023.

Summary Of Desired Qualifications
The ideal proposer will meet the following qualifications:

- Experience with performing similar work described for organizations of similar size, scope (business lines), technology, and complexity as CCDC.
- Adequate staff capacity to effectively complete the project.
- Demonstrated experience completing deliverables on budget and on time.
- Demonstrated experience in communication strategy development.
- Experience with facilitating discussions about communications.
- Experience with implementing an communications strategy at an agency similar to CCDC in size, scope, technology and complexity.
- Demonstrated experience in communications assessment efforts.
- Experience in identifying vulnerabilities, risks, and solutions for agencies similar to CCDC in size, scope, technology and complexity.

Proposal Evaluation Criteria
CCDC reserves the right to evaluate, in its absolute discretion, the total proposal of each proponent so as to select the services which best serve the needs of the organization.

The following are CCDC’s criteria for selection of a proponent:

- Understanding of requirements and needs of CCDC based on submitted response including workplan, methods, and timeline.
- Experience in completing projects of similar scope and complexity, particularly for non-profit organizations, on time and on budget.
- Resources assigned to the project.
- Cost for the services proposed.
- Alignment with CCDC’s values and mission.

Selection Process and Review Criteria
CCDC will review the proposers based on the multi-stage review process detailed below. Proposals must score satisfactorily in each level of review, as applicable.
Level 1 Internal Review:
CCDC will evaluate all proposals for completeness and minimum requirements. Basic requirements include the following: timely receipt of proposal, submission of all required attachments and adherence to eligibility requirements. Proposals with omissions of any required documentation are subject to disqualification.

Level 2 Proposal Review:
Proposers that pass Level 1 review will proceed to Level 2 review. Internal reviewers will review and score proposals using the review tool listed as Appendix A and sign a Conflict-of-Interest form (Appendix B). Highly scoring proposers in Level 2 Review will proceed to Level 3 Review. Please refer to Appendix A for specific Scoring Criteria that will be used during Level 2 review.

Level 3 Interview
Highly scoring proposals from Level 2 Review will proceed to Level 3 Review. Only key personnel on the proposed RFP must attend the interview. Interviews are scheduled to be held on dates shown in the RFP Timeline. These dates are subject to change at CCDC’s sole discretion. Interviews will be held either at CCDC or via video conference. Further written materials may be requested prior to or after the interview. CCDC reserves the right to schedule additional interviews/meetings should additional questions arise. The interview panel will recommend a proposer from the interview process to be awarded the contract or recommended to the Executive Director for award of the contract.

Reference Checks
Reference checks will be completed. Information obtained through reference checks will complement the results from the other levels of review. CCDC must be able to contact a minimum of two (2) references provided by the proposer. If two (2) references cannot be reached, CCDC may deem the proposer ineligible for this RFP.

The highest scoring applicant from the Level 3 review process with successful references will be recommended for award of the contract.

Required Documentation
Proposers must submit the following required documents through the online application system in order to be eligible for this RFP. All narrative sections should be single-spaced, Arial, 11-point font with 1-inch margins.

1. Cover sheet
2. Proposal – (5 pages maximum) Describe the proposed work plan to accomplish the activities and complete the deliverables within the proposed timeframe proposed. It is expected that the proposer will use its expertise and offer suggestions to the scope of work to identify the required processes and methods to perform each project.
   a. If subcontractors are anticipated, describe what work will be subcontracted, experience with each potential subcontractor, and how the subcontracted work will be controlled and monitored to ensure that project goals are met.
3. Team Qualifications and Resumes – (15 pages maximum, not including resumes) Demonstrate staff and team qualifications by providing the following:
   a. Description of how the organization has adequate staff qualifications to complete the deliverables of this RFP and ensure that project goals are met. Please include information about lead personnel and key supporting personnel.
   b. List of all staff and subcontractors that will perform or is anticipated to perform work under this RFP and the anticipated task/role.
   c. Resumes for key personnel and subcontractors performing work for the project (resumes must clearly explain relevant background and qualifications of key personnel and subcontractors).
   d. Summary of Experience – (6 pages maximum) Describe two (2) relevant work experiences that specifically illustrate how proposer has been successful with previous projects of similar scope and scale.
4. **Cost Proposal** – (2 pages maximum) Provide a fixed fee cost proposal. Provide a cost breakdown for each of the proposed fixed fees and include an explanation of your proposed costs. Also provide the hourly rate per staff anticipated to perform work for this project, including any subcontractors. State each staff member’s name, title and rate.

5. **References** – Provide a list of three (3) current or former references for which the proposer has performed similar work. Please use the form provided as Appendix C.

**Terms Of Project**

A final budget for the assessment will be negotiated once a consultant has been selected. Funds will be paid upon submission of invoices based on incurred expenses.

CCDC anticipates that the contract will begin September 1, 2023. The selected consultant will enter into a fixed fee deliverables-based contract with a fixed price payment structure.

The final amount and length of the contract will be negotiated with the selected proposer and will be subject to final approval by the Executive Director.

The selected contractor is responsible for supplying all business equipment needed to carry out its duties (e.g., computer, printer, fax, internet access). The duration, extension, renewal, and amendment of the contract may be contingent upon the approval of the Executive Director.

**Appeals Policy**

CCDC reserves the right, without prejudice, to reject any or all submitted proposals. An appeal shall be permitted only on the grounds that the decision violated applicable law, CCDC policies and procedures, or the terms of this RFP. Appeals challenging CCDC’s decision on the merits or qualifications of proposers or the scoring of proposals shall not be permitted. An appeal of a CCDC decision shall be in writing and filed with the office of the Executive Director, or his or her designee, within five (5) business days following the date the notification of decision is made by CCDC.

**Appendices**

Appendix A: Internal Scoring Review Tool and Scoring Criteria

Appendix B: Conflict-of-Interest form

Appendix C: References