

Request for Proposals

Marketing and Communications Review



The Community Action Partnership of Oregon (CAPO) invites you to submit a proposal to conduct a marketing/communications audit to start **on or before June 15, 2021**.

CAPO seeks a consultant or consulting firm (Consultant) to assist CAPO and its network of member agencies with strategic marketing and communications. The Consultant will report to CAPO's Executive Director. We have earmarked \$10,000 for the review phase of the network's marketing and communications needs. The review will provide the network with the information we need to move to the second phase and create a marketing/communications plan for CAPO and the network.

About CAPO and Community Action

CAPO's mission is:

To magnify the impact of Community Action to serve low-income Oregonians by advocating for resources with a unified voice, strengthening partnerships, and building capacity.

Community Action is a nationwide network of nonprofit and public agencies funded by the Community Services Block Grant (CSBG), a federal program that allocates funding to states to fight poverty and connect Americans to greater opportunity. CAPO is a 501(c)(3) non-profit organization serving a network of 18 Community Action Agencies (CAAs) as the State Association for these agencies in Oregon. Our member agencies vary in size and scope, from 300+ employees and annual budgets of \$50 million+ to fewer than 20 employees and \$5 million - \$10 million annual budgets.

CAAs deliver a broad range of human services to the most vulnerable Oregonians to every corner of the state. Federal, state, foundation grants and community fundraising provide support for homeless services, energy and weatherization assistance, reducing food insecurity, Head Start, and services targeted specifically for youth and families, seniors, farmworkers, and much more. See the included CAPO network territory map and service matrix for more detail.

CAPO has twelve (12) employees based virtually and in a veteran services field office in Klamath Falls. CAPO's annual revenue in fiscal year 2020-21 is budgeted at \$2.9 million. CAPO's work is funded by several federal and state grants, along with annual member contributions for general network services. Our services comprise:

Advocacy – CAPO brings our network together to create a unified voice throughout Oregon for the interests of member agencies. CAPO has direct relationships with state agencies such as Oregon Housing and Community Services (OHCS), and the Department of Human Services, as well as other statewide social service associations and organizations such as the Oregon Food Bank, Housing Authorities of Oregon, and Neighborhood Partnerships.

Supportive Services for Veteran Families – a U.S. Department of Veterans Affairs (VA)-funded program designed to end the homelessness of America's veterans. CAPO provides direct service in Klamath County and manages funding for five network members serving other rural counties.

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The Rural Oregon Continuum of Care (ROCC) – a U.S. Department of Housing and Urban Development (HUD)-funded program that provides coordination, training, and technical assistance to 28 Oregon counties serving clients with Continuum of Care (CoC) projects (i.e., projects that serve people who are homeless or housing insecure). CAPO also has two staff positions to coordinate and streamline data management for the ROCC.

Training and Technical Assistance (T&TA) – offered through free classes and consultation designed to provide Community Action network staff with program service and agency management best practices.

Our Challenge

As identified in our 2020-2023 Strategic Plan, one of our primary goals is to increase awareness of and resources to alleviate the causes and conditions of poverty. While CAAs provide services to every county in the state, the Community Action brand lacks recognition. CAAs operate independently with their own names and brands, increasing the difficulty in telling a coordinated, comprehensive story about the good work Community Action does. For example, we have identified our need to:

- communicate effectively to diverse audiences, increasing public awareness of the Community Action network.
- be recognized by funders, donors, and local and national partners as leaders and experts in understanding and effectively addressing the causes and conditions of poverty.

Project Deliverables

To address our goals and current challenges, we seek a Consultant who can conduct a review of our current communications environment that we can later use to inform the creation of a marketing/communications plan for CAPO and our member agencies.

We will rely on the experience and expertise of the Consultant to determine the full scope of the communications environmental audit. The overall goal of the audit is to collect and report the information needed to inform the creation of a communications plan that will help us address the challenges and achieve the goals listed above. By way of guidance, we consider the following items important elements to consider in creating the scope of the audit:

- Assess CAPO's marketing and communications work over the last 12 months.
- Assess the current marketing work and capacity of each of the 18 member agencies.
- Collect input from CAA leadership and staff, and other key stakeholders.
- SWOT analysis.

We also expect the following meetings/calls will be necessary to a successful audit:

- One (1) kick-off meeting to discuss and better understand goals and priorities.
- Meet with CAPO Board of Directors, Executive Committee members, and other CAA staff as needed (especially when collecting input from these groups).
- Attend and present the final audit findings to the CAPO Board of Directors and the Marketing and Communications Committee members.

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Proposal Requirements and Scoring

A completed proposal should include the following documentation. Only complete proposals will be considered. CAPO strongly encourages applicants that are women owned, and emerging small business, veteran owned, or disadvantaged business enterprises. By submitting for this RFP, the respondent agrees it will comply with all federal, state, and local laws prohibiting discrimination on the basis of age, sex, gender, marital status, race, creed, color, national origin, ability, or familial status.

- **Cover Letter**
- **Relevant Experience (20 points)**
 - Proposer's experience (e.g., history of the consultant/firm, years in business, experience with communications audit and/or similar projects).
 - Proposer's understanding and experience with effective brand and communications strategies for non-profit organizations.
- **Qualifications of Personnel (30 points)**
 - List roles and responsibilities of each person assigned to the Project, including the estimated time commitment to this Project for all key personnel.
 - Provide resume for each personnel/staff assigned to the Project.
 - Provide statement that the Consultant is prepared to begin work immediately upon notification of award (or provide an alternative timeline for starting work).
- **Previous Performance (30 points)**
 - 2-3 samples of previous communications audit or similar project.
 - Proposer's ability to meet project deadlines.
 - List of relevant clients (past and present).
- **Detailed Fee Proposal (20 points)**
- You are welcome to include other pertinent information to address the selection criteria and assist the selection committee in evaluating your qualifications.

Proposal Format

- No more than ten (10) total pages of content at 8 ½ x 11 sheets, including the cover letter.
- No Covers, dividers, and tab sheets please.
- Content shall be presented no smaller than 12-point font size.

Please submit your proposal by email to:

Janet Merrell

Executive Director

Email: janet@caporegon.org

Subject: CAPO Marketing Consultant Proposal

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Proposal Timeline

Deadline for questions: April 24, 2021
Responses to questions issued: April 27, 2021
Submission deadline: April 30, 2021 5:00 p.m.
Submission review: May 5, 2021
Applicants notified: May 10, 2021

Additional Information and Requirements

CAPO encourages proposals from consortiums of small businesses, minority-owned firms, women's business enterprises, and labor surplus area firms when a contract is too large for one of these firms to handle individually.

CAPO reserves the right to modify the selection process or other aspects of this RFP at its sole discretion. CAPO reserves the exclusive right to modify the time for submission of proposals and interviews, and to issue amendments to this RFP.

Promotional activities or contact with CAPO personnel, including CAPO Board Members, is prohibited. Other than discussion with the CAPO staff designated in this RFP (which is encouraged for questions pertaining to the requirements of this RFP), proposers and their representatives are not permitted to make any direct or indirect (through others) contact with members of CAPO staff, or CAPO Board of Directors regarding this RFP. The designated staff contact is: **Janet Merrell, Executive Director, CAPO.**

Any and all costs or expenses associated with the preparation of a response to this request for proposal and participation in the selection process, including travel time and expenses, shall be the responsibility of the firm submitting the proposal, and CAPO shall not have any obligation to pay or reimburse any such cost of expense.

Proposals will be reviewed and scored, whereupon CAPO may invite one or more of the highest-ranking firms to interview in person and introduce their team personnel as well as present further qualifications as appropriate. CAPO intends to negotiate an agreement with the selected firm. If an agreement cannot be reached with the selected firm, CAPO reserves the right to negotiate with the runner-up.

If you have questions or would like further clarification on any aspect of this RFP, please contact me at 503-830-9969 or janet@caporegon.org. I look forward to your proposal.

Sincerely,


Janet Merrell
Executive Director

Enc: CAPO Service Map and Matrix
CAPO 2020-2023 Strategic Plan