



September 7, 2021

**REQUEST FOR PROPOSAL (RFP)
PROFESSIONAL SERVICES FOR**

**REGIONAL ECONOMIC DEVELOPMENT
MARKETING AND COMMUNICATIONS**

PROPOSALS DUE OCTOBER 1, 2021
LATE SUBMITTALS WILL NOT BE ACCEPTED

Respond to:
Michelle Geller
Economic Development Manager
City of Oceanside
300 N. Coast Highway
Oceanside, CA 92054

I. BACKGROUND AND INTRODUCTION

In 2012, the cities of Carlsbad, Escondido, Oceanside, San Marcos and Vista initiated a formal collaboration effort to bring prosperity to the North County region. From that collaboration, the economic development initiative called “Innovate78” was born.

Since 2014, the five cities have contracted with the San Diego Regional Economic Development Corporation to provide professional services to support Innovate78, including development and execution of regional marketing and economic development strategies to retain, expand and attract businesses along the 78 Corridor.

The Innovate78 cities are now exploring a new model for this regional effort, which will include services provided through a customized membership with the San Diego North Economic Development Council (SDNEDC). This membership will support the development and execution of regional economic development strategies and tactics to further support business retention, expansion and attraction efforts.

As part of this new model, the Innovate78 cities are seeking marketing and communications expertise to support these regional economic development efforts.

II. REGIONAL OVERVIEW AND PROJECT DESCRIPTION

Carlsbad, Escondido, Oceanside, San Marcos and Vista are flourishing, unique cities strategically located in the northern-most part of San Diego County, with a combined population of about 644,000; a median age of 38 years; and a median household income of \$82,958. The area boasts a range of housing from rental and starter homes to large lots and executive homes.

The five cities are connected by Highway 78, which runs between Interstate 15 on the eastern end and Interstate 5 on the western end. The 78 Corridor is also a transportation hub for the Sprinter, an east-west light rail line with stops in Escondido, San Marcos, Vista and Oceanside, in addition to connections to Carlsbad and San Diego to the south via the Coaster rail line.

With breakthrough technology companies and research organizations, a large population of military personnel and a strong tourism industry, the 78 Corridor has one of the most diverse, dynamic economies in the country. Key industries include: life sciences, higher education, specialty food and beverage manufacturing, information and communications technology, healthcare and a variety of manufacturing sectors including medical device, recreational equipment and pharmaceuticals.

The quality of life in North County San Diego, and specifically along the 78 Corridor, is unparalleled. The region boasts beautiful beaches, miles of hiking and biking trails, temperate year-round weather, great schools and quaint neighborhoods. Notable attractions include the LEGOLAND theme park, the San Diego Zoo Safari Park, the WAVE water park, Stone Brewing Co. and Stone World Bistro and Gardens. Historical and cultural amenities include the San Luis Rey Mission, the California Center for the Arts, the Oceanside Museum of Art and the Moonlight Amphitheater. The 78 Corridor is also home to Cal State San Marcos, Palomar Medical Center, Tri-City Medical Center and McClellan-Palomar Airport. Combined, the Innovate78 cities are home to 8 beaches, 19 golf courses, 51 craft breweries and over 175 miles of recreational trails.

III. SCOPE OF WORK

A. KEY ACTIVITIES AND DELIVERABLES TO BE PROVIDED

The following activities and deliverables are required:

- **Kick-off meeting with project leadership:** Review roles and responsibilities, establish workflow for project management and key points of contact.
- **Key performance indicators:** Establish key performance indicators (KPIs) that correspond to approved goals and can be regularly monitored to influence optimization opportunities.
- **Audit of existing assets:** Assessment of images and video in the Innovate78 catalog with recommendations for what images or videos should be added to fully represent the 78 Corridor's innovation economy.
- **Strategy:** Using recent audience analysis and brand identification research, develop a marketing and communications strategy for Innovate78 to develop a marketing and communications strategy for Innovate78 to implement a comprehensive marketing plan to achieve strategic goals
- **Website and social media management:** Manage website hosting and create branded, dynamic content for existing Innovate78 website and social media channels.
- **E-Newsletters:** Continue Innovate78 e-newsletter and give consideration to how city-developed newsletters can cross promote Innovate78 opt-ins, and vice versa.
- **Marketing collateral:** In partnership with Innovate78 data and research consultants, produce branded research reports, infographics, fact sheets and other collateral.

The following optional activities and deliverables may be included as part of a proposed action plan to enhance the required activities above, as resources allow:

- **Content creation:** Develop a robust content schedule for Innovate78's blog with short, frequent posts. Posts should be a mix of fun, specific, helpful and general posts that hit our targets on a variety of points, as well as reinforce Innovate78's personality. Posts should be influenced by keyword volume trends, as well as emphasize Innovate78 services and data/reports to boost search engine rankings and establish Innovate78 as an extensive business resource.
- **Photo and video asset creation and acquisition:** To support content creation and marketing collateral, organize, manage and complete photo and video shoots to gather b-roll and stock photography that aligns with the brand, including original photos and videos for ongoing website and social media use. These assets should be in a format and hosted on a platform that is accessible by the city communications teams.
- **Sharable social stories:** Establish social media campaigns and assets that businesses and employees can repost, including badges, stats, testimonials and spotlights.
- **Engagement mapping:** Outline all of the ways and places that target audiences could and should interact with the Innovate78 brand. A special focus should be placed on current businesses.

- **Communications audit:** Since the five cities execute their own communications, it is important to note the many ways a target audience member could be exposed to the Innovate78 brand. This audit will document things like social media posts and followers; e-newsletter distribution lists and schedule; collateral review; council presentations; website content, etc. With this complete picture, the ecosystem of communication touchpoints and potential synergies will be clear.
- **Brand style guides:** Revisit existing style guides and update them to reflect evolutions in branding as necessary.
- **Brand personification:** Create a detailed personality guide that outlines the tone, diction and personality traits to exemplify Innovate78.
- **Video campaign:** Translate Innovate78 assets and assistance into video vignettes featuring 78 Corridor companies and or data to enable Innovate78 to reach a new batch of businesses that might be hesitant to ask for help directly. Short form content for use on social media is preferred.
- **Trainings and webinars:** Host and record topical trainings of varied lengths to post on Innovate78's website. Topics should range in business savvy and build Innovate78's opt-in email lists.
- **Communication briefs:** Create short briefs with key messaging and talking points that can be shared with the SDNEDC, city staff and possibly the media surrounding key events and report findings for unified messaging across agencies.
- **Press kit creation and maintenance:** create and maintain a package of downloadable files on the website that contains the logo, key statistics, images and reports for press and media outlets as well as brokers and site selectors.
- **Branded marketing promotional items:** suggest, create and order branded items as necessary for events; examples may include items such as: t-shirts, water bottles, notebooks, pens, folders to hold marketing collateral documents etc.

B. CONTRACT PERIOD

Any resultant contract shall be effective from the date of contract execution, and shall remain in full force and effect for a period of two years, pending funding availability.

C. BUDGET

Respondent shall provide proposal for cost of proposed program, not to exceed \$100,000 per contract year. Please provide detailed pricing information on proposed tasks, staff hours, and related costs.

IV. SUBMITTAL FORMAT

All submittals shall be from a qualified organization that has demonstrated experience working on economic development marketing and communications projects. Please include the following:

1. **Cover Letter** – The letter must convey an understanding of the prospective project and its key objectives and an overview of the project team. The letter should be signed by the principal contact and the letter's signatory must be the person authorized to bind the organization to any subsequent contract with the City.

2. Scope of Work - The selected Contractor's proposed Work Plan and Schedule will form the basis for negotiations of a final Scope of Work for the Professional Services Agreement.
3. Team Qualifications, Experience, and References - Provide a clear description and qualifications of the Project Manager and the proposed team with names, program responsibilities and proposed staffing numbers. Please provide references to include client information and relevant services provided.
4. Portfolio of Sample Work – Showcase examples of previous social media posts, short-form videos, and or website blogs that resulted in an increase in target audience engagement.
5. Cost Proposal – Respondent shall provide a lump sum fee for the services identified in the scope of work. Respondents shall also provide a schedule of hourly rates for individuals assigned to this project, as well as any other fees associated with this work.
6. Insurance Requirements – Provide proof that Contractor can obtain the following minimum General Liability insurance coverages, among other insurance requirements listed in the Sample Professional Services Agreement attached:

Comprehensive General Liability Insurance

(Bodily injury and property damage)	
Combined Single Limit per Occurrence	\$ 2,000,000
General Aggregate	\$ 4,000,000*

Commercial General Liability Insurance

(Bodily injury and property damage)	
General limit per occurrence	\$ 2,000,000
General limit project specific aggregate	\$ 4,000,000

Automobile Liability Insurance \$ 2,000,000

*General aggregate per year, or part thereof, with respect to losses or other acts or omissions of Contractor under the Agreement.

REQUEST FOR PROPOSAL RESPONSES THAT DO NOT INCLUDE THE ABOVE REQUIRED ITEMS WILL BE DEEMED NON-RESPONSIVE AND WILL NOT BE CONSIDERED.

V. RFP AND EVALUATION SCHEDULE

The distribution, receipt, and evaluation of proposals, as well as selection of the Consultant, will conform to the following schedule:

Release of RFP:	September 7, 2021
Proposals Due:	October 1, 2021 by 5 p.m.
Finalization of Contract:	By December 31, 2021

VI. SUBMITTAL DATE AND DIRECTIONS

A PDF no larger than 10MB of the submittal shall be received at the email address below no later than 4 p.m. on October 1, 2021.

Michelle Geller
Economic Development Manager
mgeller@oceansideca.org
City of Oceanside
300 N. Coast Highway
Oceanside, CA 92054

VII. SUBMITTAL SELECTION PROCESS AND EVALUATION CRITERIA

Each proposal will be reviewed to determine if it meets the submittal requirements contained within this RFP. Failure to meet the requirements for the RFP can be cause for rejection of the proposal. The City may reject any proposal if it is conditional, incomplete, or contains irregularities. Incomplete submittals, incorrect information or late submittals shall be cause for immediate disqualification. A selection committee will review all proposals meeting the requirements outlined in this Request for Proposals.

VIII. PUBLIC DISCLOSURE

As a general rule, all documents received by the City of Oceanside are considered public record and will be made available for public inspection upon request.

IX. TERMS AND CONDITIONS

The City reserves the right to retain all proposals for a period of sixty (60) days for examination and comparison. The City also reserves the right to waive non-material irregularities in any proposal, to reject any or all proposals, to reject or delete one part of a proposal and accept the other, except to the extent that the proposals are qualified by specific limitations.

Once the proposal has been selected and all negotiations completed, the Contractor will be asked to execute the City's Standard Professional Services Agreement, attached hereto, and return it to the City with all necessary documentation including Certificate of Insurance. Once the City Attorney has reviewed and approved the agreement, a presentation may be scheduled for consideration of a contract by the Oceanside City Council, if the contract exceeds \$50,000.

All reports, documents, and other materials prepared by or in possession of the Contractor as part of work or services under any contract awarded pursuant to this RFP shall become the permanent property of the City and shall be delivered to the City upon demand.

X. EQUAL OPPORTUNITY PROGRAM REQUIREMENTS

The City of Oceanside is committed to equal opportunity in solicitation of professional service consultants doing business with, or receiving funds from the City. The City encourages candidates to share this commitment.

XI. CITY CONTACT

The City of Oceanside is managing the RFP process on behalf of Innovate78 and looks forward to receiving your proposal. If you have any questions regarding this RFP, please contact:

Michelle Geller
Economic Development Manager
City of Oceanside
300 N. Coast Highway

Oceanside, CA 92054
mgeller@oceansideca.org
(760) 435-3351

XII. RESOURCES

In submitting an RFP Package, it is recommended that a number of documents should be reviewed and analyzed, including but not limited to the following:

- Innovate78.com
- City of Oceanside Sample Professional Services Agreement – Attachment 1
- City of Oceanside Vendor Packet - see website:
<http://www.ci.oceanside.ca.us/civicax/filebank/blobdload.aspx?blobid=27470>