



**Request for Proposals**  
*for*  
**Marketing and Branding Consultant**



**City Hall**  
**600 Elm Street**  
**San Carlos, CA 94070**  
**[www.cityofsancarlos.org](http://www.cityofsancarlos.org)**



## The City of San Carlos

San Carlos is located on the San Francisco peninsula, in San Mateo County. It is approximately 25 miles south of San Francisco and 26 miles north of San Jose. The city is 6 square miles and has a population of 28,000 people. San Carlos is a thriving community, with an emphasis on families, recreation, and good quality of life. The 2008 median household income was \$123,000 and the median home value is \$1,000,000. Highway 101 runs through the eastern portion of the city, near to an assortment of industrial and commercial uses, including a small airport, as well as some residential uses. The west side extends into the Santa Cruz Mountains and is largely residential with the exception of the El Camino Real corridor and the Laurel Street downtown district.

## Economic Development and Marketing Efforts

The City of San Carlos (“City”) is implementing an Economic Development Plan, first adopted in 2007 to foster a healthy business community. The subsequent 2008 Economic Development Plan Update included the development of a marketing strategy to promote increased patronage of San Carlos businesses and attract new businesses as well. At the direction of the City Council, a draft marketing study was recently completed.

The City is seeking a branding and marketing consultant to refine its draft marketing strategy and assist with community marketing efforts. In concert with the business community, the City has developed the San Carlos Draft Marketing Strategy (“Strategy”) to bolster the local business climate. The Draft Strategy outlines the following key marketing targets:

- Resident consumers,
- Non-resident consumers,
- Existing San Carlos businesses (retention and expansion), and
- New businesses (recruitment).

For each of these targets, the Draft Strategy identifies a series of marketing tactics and implementation initiatives.

The City is now seeking a marketing consultant to finalize the Draft Strategy and begin efforts to create a San Carlos brand and launch an identity and brand awareness campaign. The marketing consultant must have experience with developing a public sector brand, and with community marketing campaigns. In order to gain insights from San Carlos residents regarding their consumer behavior, the marketing consultant must also be experienced with community outreach in order to assess current consumer attitudes and perceptions.

## Project Requirements and Scope of Services

### REVIEW AND FINALIZE THE MARKETING STRATEGY:

The marketing consultant shall review/analyze the Strategy and provide recommendations regarding the most effective implementation tactics and tools. Specific focus shall include:

- The four target areas,
- The marketing tactics and implementation tools,
- The marketing priorities,
- Prioritizing the tools and tactics to most effectively implement a Strategy that fits San Carlos,
- Other marketing and branding strategies the City should consider,
- Preparing cost estimates, budgets and realistic timeframes for each task, and
- Identifying the best practices for marketing and branding.

### PROPOSE A BUDGET:

The marketing consultant shall develop a budget for the marketing program that outlines implementation actions and their associated cost. The City anticipates commencement the community branding effort, finalization of the Draft Strategy, and completion of any other key early stage marketing initiatives during fiscal year 2009-10. Other implementation efforts, including the launch of the brand campaign, would commence in fiscal year 2010-11.

### MONITORING SYSTEM:

The marketing consultant shall develop a monitoring system and performance measures to assess the effectiveness of the various marketing methods.

### EVALUATE CITY'S IMAGE AND BRAND:

The marketing consultant shall evaluate the City's image and brand, conduct an assessment of community attitudes and perceptions, and provide recommendations regarding whether or not a new or updated image and brand is needed for the City's marketing initiatives. To the extent needed, the marketing consultant will craft a new brand and themes for City consideration.

### DEVELOP AN IDENTITY/BRANDING AWARENESS PROGRAM:

The marketing consultant shall propose a well-defined identity/branding awareness program to persuade resident and non-resident consumers to patronize San Carlos businesses. The branding programs must also be applicable for business retention and recruitment strategies. The consultant shall also launch the first year marketing program for San Carlos.



## Consultant Expertise and Proposal Format

Interested firms are encouraged to keep their proposals brief and relevant to the Scope of Services. All proposals should include the following:

- Cover letter with name, address, phone number, and e-mail address of the contact person; identify the capacity this person has to manage and execute a marketing strategy and branding campaign of this magnitude.
- Identify the project manager and the personnel to be assigned to this engagement (including names, addresses, current phone numbers, and e-mail addresses). Please include resumes for all team members, identify how many years this team has worked together, and a list of projects this team has completed or is currently working on.
- Identify all sub-consultants (including names, addresses, current phone numbers, and e-mail addresses) and include a resume of related experience, how long the sub-consultant has worked with the marketing consultant, and how many projects the sub-consultant has completed, or is currently working on, with the marketing consultant.
- Background on the firm and its experience in preparing comprehensive and strategic marketing programs and campaigns, especially for cities and public agencies. Preference shall be given to firms that have a local presence and knowledge of the Silicon Valley, the greater Bay Area and the City of San Carlos.
- A narrative that presents the services a firm would provide detailing the approach, methodology, deliverables, and client meetings.
- Description of overall knowledge of the City of San Carlos.
- A list of tools used to measure reach and frequency when purchasing media (television, radio) and tools used to measure effectiveness of print and online advertising and a branding awareness campaign. Experience in media negotiations and placement should be demonstrated.
- A summary of any suggested approaches the City should consider for this effort.
- A timeline for the preparation and implementation the tasks/activities being proposed per Scope of Services.
- At least three (3) public or private references for projects of similar nature to this engagement.
- List of billable rates for all personnel assigned to project, including hourly rate, media commission percentages, and any other charges that are proposed.
- Proof of financial soundness: financial statements, a balance sheet, and two years of federal tax returns. For confidentiality purposes, this information should be mailed separately to: Alexa Smittle, Rosenow Spevacek Group, Inc., 309 West 4th Street, Santa Ana CA 92701-4502.

- A summary of the professional liability and errors and omissions insurance coverage the firm maintains.
- Identification of any concerns related to the City of San Carlos’s standard professional services agreement.
- Submit the cost proposal in a separate sealed package entitled “City of San Carlos Marketing and Branding Consultant Cost Proposals”.

Respondents should submit 5 bound copies and 1 unbound reproducible copy by mail or courier. Submittals should not exceed 25 pages, inclusive of any graphic renderings or marketing materials. All hard copy submittals should be directed to the below contact no later than **5:00 p.m. on Monday, May 11:**

Mark Sawicki  
Economic Development and Housing Manager  
City of San Carlos  
600 Elm Street  
San Carlos, CA 94070

## Materials Available

For the consultant’s convenience, the City has provided a series of applicable and related documents at [http://www.cityofsancarlos.org/ed/marketing\\_and\\_branding\\_consultant\\_\\_\\_request\\_for\\_proposals/default.asp](http://www.cityofsancarlos.org/ed/marketing_and_branding_consultant___request_for_proposals/default.asp) including:

- Draft Marketing Strategy
- Economic Development Plan 2007 and Update 2008
- “Shop San Carlos” brochure prepared by the San Carlos Chamber of Commerce
- Professional Services Agreement

For further information, please contact Mark Sawicki, Economic Development and Housing Manager at (650) 802-4220 or [msawicki@cityofsancarlos.org](mailto:msawicki@cityofsancarlos.org). Questions on this RFP should be submitted in writing solely to Mr. Sawicki, preferably by email. All responses from staff will be shared with all interested parties via posting to the project web page at:

[http://www.cityofsancarlos.org/ed/marketing\\_and\\_branding\\_consultant\\_\\_\\_request\\_for\\_proposals/default.asp](http://www.cityofsancarlos.org/ed/marketing_and_branding_consultant___request_for_proposals/default.asp)

Contact with other City officials or staff may result in disqualification of the submittal.

## Selection Criteria

Factors to be considered in the selection process include:

- The completeness of the submittal.
- Relevant experience of the consultant in producing similar, high-quality campaigns.
- Prior experience developing and implementing successful identity and branding campaigns for cities or other “place” clients.
- Demonstrated success with community participation.
- The degree to which the branding consultant illustrates its understanding of San Carlos and the importance of an identity and branding campaign for the City.
- The quality of example materials and any presentations requested by the Selection Committee, Economic Development Advisory Commission, or City Council.

## Selection Process

All statements submitted in response to this RFP will be reviewed and evaluated based on the information contained in the respective responses, an investigation of the consultant’s past projects and performance, and other pertinent factors. The City will prepare an analysis of all statements. In addition, the City may form a selection committee and interview a limited number of finalists. The City reserves the right to request additional information as deemed necessary and appropriate. A recommendation will be made to the City Council for the selection of one marketing and branding consultant with whom the City will enter into a Professional Services Agreement.



This solicitation does not commit the City to award a contract, to pay any cost incurred with preparation of the proposal, or to procure or contract for services or supplies. The City reserves the right to accept or reject any or all submittals received in response to this request, to negotiate with any qualified source, or cancel in whole or in part this process in its sole and absolute discretion. Subsequent to negotiations, prospective marketing and branding consultants may be required to submit revisions to their proposals. All persons or entities responding to the RFP should note that any contract pursuant to this solicitation is dependent upon the recommendation of the City staff and the approval of the City Council after all legally required steps are taken.

The City reserves the right to postpone selection for its own convenience, to withdraw this Request for Proposals at any time, and to reject any and all submittals without indicating any reason for such rejection. As a function of the Request for Proposals process, the City reserves the right to remedy any technical errors in this Request for Proposals and modify the published scope of services. The City reserves the right to request that specific personnel with specific expertise be added to the team, if the City determines that specific expertise is lacking in the project team. Submittals and other information will not be returned.

The City reserves the right to abandon the Request for Proposals process and/or change its procurement process for the contract at any time if it is determined that abandonment and/or change would be in the City's best interest. The City will not be liable to any consultant for any costs or damage arising out of its response to the Request for Proposals.

The selection process is expected to take up to approximately 6 months as outlined below. Please note the schedule may be altered at the City's discretion.

<b>Activity</b>	<b>Anticipated Completion Date</b>
RFP Issued	Friday, April 10, 2009
Submittals Due	Monday, May 11, 2009
Review of Submittals	May 11—May 22, 2009
Interviews	May 26—June 5, 2009
Recommendation to City Council	July 2009
Contract awarded and Professional Services Agreement Executed	August 2009