

Communications and Marketing Consultant REQUEST FOR QUALIFICATIONS

BACKGROUND

Being “banked” isn’t just an adjective; it is, in fact, a critical component of financial stability. Having and using a basic transactional account both facilitates critical everyday transactions, and at the same time provides a core foundation for other financial successes. Barriers to accessing the financial mainstream often necessitate the use of alternative financial services—such as check cashers, payday lenders, and pawn shops— that usually are more expensive than banks and credit unions. Unbanked consumers who rely on alternative financial services must pay to access their own money, are charged for every transaction, and have limited opportunities to save for the acquisition of assets or financial emergencies.

Creating pathways towards greater financial security for all people, particularly people of color, must include sound, collaborative approaches as well as access to appropriate resources that allow for the implementation of long-term, sustainable policies and practices that eliminate the systematic barriers that leave room for discriminatory and predatory financial practices to prevail.

Based on demonstrated program need, the Bank On CLE Coalition was formed in 2021 and a committed group of community members representing a diverse group of individuals and organizations, focuses on the following objectives:

1) Build a coalition able to influence change of banking policies and products that impede the economic mobility of low-income and BIPOC households, using racial equity as our guiding framework.

- ❖ Awareness - Acknowledge and raise awareness of the historical and persistent disadvantages BIPOC individuals and small businesses have experienced establishing/building a banking relationship.
- ❖ Access - Drive the equitable access to banking, services and lending products that support asset building through savings, home ownership and business start-up and expansion.
- ❖ Metrics - Create metrics that organizations agree to track and measure success in serving LMI and historically underserved BIPOC individuals and communities.
- ❖ Membership - Solicit membership and convene a diverse group of cross-sector partners with the goal of breaking down silos and developing cross-sector integration partnerships.

2) Create a pathway for unbanked and underbanked households, in particular BIPOC individuals to gain access to a banking relationship beginning with a safe, appropriate, affordable checking account

- ❖ All FDIC banks in Cleveland will offer a CFE Certified Checking Account (Get Certified Here)

- ❖ Identify integration partners serving low-to-moderate income (LMI) and BIPOC individuals and nascent business owners to support the opening of Bank On certified accounts.
- ❖ Partners will leverage evidence-based best practices with the goal of creating pathways towards other financial products and services when needed
- ❖ Commit to seek out new or innovative solutions that meet the needs of LMI and BIPOC individuals
- ❖ Create a consumer/client and community focused affirmative marketing strategy

3) Establish data tracking and evaluation process with the goal of monitoring progress and informing decision-making

- ❖ Identify the tools, software, and systems necessary to track and measure success
- ❖ Identify gaps in data needed to increase equitable outcomes, who can fill and engage partners/consultants in closing those gaps.
- ❖ Create transparent and regular communication/distribution channels (e.g., reports, white papers, newsletter, social media posts, email) to share results, progress with the public.

STATEMENT OF WORK

The Bank On CLE coalition is seeking a consultant to create a comprehensive communications and marketing plan. This communications plan will begin with hosting client focus groups and then use the input and feedback provided to develop: 1) a public awareness campaign; and 2) an integrated advertising/marketing campaign that raises awareness that certified accounts are available and where possible, promote it with program integration opportunities.

PROPOSED SCHEDULE AND BUDGET

- Client focus groups: November/December 2023
- Collateral created to support Bank On and program integrations: January/February 2024
- Bank On awareness campaign: TBD
- Estimated budget including consulting time and direct advertising expenses: \$50,000

ENGAGEMENT DELIVERABLES

- **Bank On CLE Communication Plan**
 - Strategy for public awareness communication plan
 - Strategy for promoting safe, affordable bank account opening with program integration
 - Recommendations for launching a balanced approach to using multiple channels of promotion along with proposed timeline for each campaign
 - Branding guidelines
- **Consistent, Culturally Competent Messaging**
 - Messaging on access to safe, affordable bank accounts and other financial well-being and/or wealth-building programs
 - Identify and map if there are different perspectives for individuals who are unbanked vs underbanked
 - Create vehicles/tactical plans for effectively communicating with each audience
 - Translation of materials into other languages as identified

- **Collateral**
 - Tailored to promote safe, affordable bank accounts AND collateral tailored for grassroots, neighborhood-based promotion that includes door knocking scripts, brochures, flyers, and community meeting materials
- **Negotiate and Purchase Placement of Mass Marketing Advertisements**
 - Radio, television, print media, and direct marketing such as billboards, RTA bus signs, yard signs, neighborhood kiosks, postcards, posters, and community publications
- **Social Media Content**
 - Twitter, Instagram, Facebook, e-newsletters for Bank On channels
 - Sample posts for partners to use and distribute
- **Alternative Modes of Mass Communication**
 - Content creation for texting, letters, and robo-calls
- **Toolkit for Various Partners and Stakeholder Groups**
 - Using existing collateral and promotional items to preserve branding guidelines but allows for personalization by each program integration partner
- **Community Outreach**
 - Resident Focus groups– ensuring safe and inviting forums for residents to share their stories, delve deep in understanding perspectives and root causes of barriers and solicit resident recommendations on banking action and policies.
 - Outreach should be spread across city neighborhoods, specifically those that have been historically underserved:

Census Tracts

Greater Downtown

107101, 108201, 108400, 108301, 108701, 109301, 980100, 107701

Opportunity Corridor-Central-Hough

111202, 111500, 111600, 111700, 111902, 111800, 112100, 112200, 118602, 112301, 112400, 112500, 112600, 112800,
118900, 113101, 196500, 113500, 113600, 113801, 114100, 114700, 114300, 114501, 114600, 119300

Glenville-Collinwood

117700, 117600, 117800, 117201, 117202, 117101, 117102, 117400, 117300, 117500, 117900, 126100, 116900, 116700,
116800, 116300, 116600, 118400, 118200, 118101, 116500, 116400, 111401, 116100, 116200, 116300

Buckeye-Woodhill-Shaker Square

118500, 118301, 118700, 118800, 119100, 119202, 119401, 119402, 119502, 119501, 120200, 119600, 119702, 119701,
119800, 119900

Broadway-Slavic Village-Southeast

110901, 110801, 114900, 115200, 115100, 115400, 115700, 115800, 115900, 115300, 127501, 123100, 120400, 120500,
120600, 121100, 121401, 121403, 120701, 120702, 121200, 120802, 120801, 121500, 121700, 121800, 121900, 122100,
122200, 122300

Clark-Fulton – Cudell

102900, 102800, 102700, 103800, 104600, 104900, 105300, 104800, 104600, 101800, 101700, 101901, 102402, 101603, 101501, 101400, 103400

Old Brooklyn

105100, 105300, 105400, 105500, 105802, 106100, 106300, 105700, 106200, 106400, 106800, 106500, 106600, 105900, 106900, 107000

- With Coalition oversight, organize all aspects of focus group logistics, including providing incentives. Summarize findings from each focus group through comprehensive notes, which include raw notes of discussion such as participant quotes, summaries, and key policy recommendations. Minimal formatting or design would be required to complete this task.
- **Monthly Reporting**
 - Summaries of marketing and outreach, including frequency and audience reach to be included in coalition funding reports. The report should identify leading obstacles the unbanked and underbanked communities face in regards to financial prosperity and outlines suggestions the City of Cleveland, The Bank On Cleveland Coalition and community partners can take in order to help remove such challenges and improve the financial wellness of those we serve based on findings.

PREFERRED QUALIFICATIONS

The Bank On CLE coalition is looking to work in close collaboration with a human-centered consultant to ensure that the campaign resonates with individuals who currently do not have a relationship with a financial institution or if they had one, but their experience was not positive as they did not advance or have their financial needs adequately met.

The preferred firm will have:

- Proven experience in development and implementation of public awareness campaigns
- Cultural competency tailored to unbanked and unbanked individuals
- Content expertise in individual and community-level campaigns
- Experience in planning, developing, implementing, managing and evaluating comprehensive communication strategies and plans
- Highly skilled in graphic design, social media promotion, and website development
- An established ability to work in collaboration with multiple stakeholders, government partners and officials and community-based agencies and residents
- Experience working on highly visible, dynamic, fast-paced projects with multiple project deadlines occurring simultaneously

PROPOSAL REQUIREMENTS

In your response to this Request for Qualifications, please include the following elements:

- Agency philosophy and approach
- Management team and Organizational chart
- Biographies of assigned team members, with specification of account lead or day-to-day contact
- Full rate card and reference to nonprofit rates or pro bono/matching programs
- Detail the organization's experience relevant to this project and creating culturally competent messaging to varied target audiences – e.g. public education campaigns, working with coalitions and the public sector, etc.
- Include at least one case study of work and outcomes that specifically address the desired qualifications noted above.
- Provide samples of collateral that demonstrate graphic design capabilities
- Proposed budget and detailed plan of what agency would accomplish in that time
- Include two client references illustrating successful services provided within the last three years

REQUIREMENTS FOR SIGNING PROPOSAL

1. Each Vendor, by making a proposal, represents that this document has been read and is fully understood.
2. The proposal must be signed in ink by an individual authorized to legally bind the person, partnership, company, or corporation submitting the proposal.

REQUIRED DOCUMENTATION SUBMISSION

Each Proposal must contain the following:

1. *On letterhead, a description of the organization, including credentials and background of all key staff members, and a description of its history and relevant experience with;*
2. *A description of how you will complete the request above and meet deliverables.*
3. *Completed Office of Equal Opportunity Vendor Forms*

<https://cleveland.diversitycompliance.com/Vendor/Registration/VendorRegistrationStart.asp>

Vendor Certification - CSB/MBE/FBE/VSBE/LGBTBE and Section 3 Businesses

<https://cleveland.diversitycompliance.com/?TN=cleveland>

4. *Provide a "lump-sum" amount due for services.*

HOW TO APPLY

Responses should be emailed to Angelina Turner, Enterprise Community Partners at aturner@enterprisecommunity.org **no later than 5:00 PM September 29, 2023**. We would like to begin working with selected firm beginning in October 2023.

DISCLOSURES

Intent

It is the intent of the City through this RFQ to establish to the greatest possible extent complete clarity regarding the requirements of both parties to the agreement resulting from the RFQ.

Before submitting a proposal, the Vendor shall be thoroughly familiar with all conditions referred to in this document and any addenda issued before the proposal submission date. Such addenda shall form a part of the RFQ and shall be made a part of the contract. It shall be the Vendor's responsibility to ascertain that the proposal includes all addenda issued prior to the proposal submission date.

The Vendor shall determine by personal examination and by such other means as may be preferred the actual conditions and requirements under which the agreement must be performed.

Basis for Award, Evaluation Criteria and Questions

The City is not obligated to accept any proposal if deemed not in the best interest of the City to do so. The City shall make award to the qualified proposal responder based on fees submitted and response to this RFQ.

Failure to include in the proposal all information outlined herein may be cause for rejection of the proposal.

The City reserves the right to accept or reject any and all proposals, in whole or in part, that is deemed to be in the best interest of the City at its sole discretion.

The City reserves the right to waive any informalities or irregularities in proposals.

The City reserves the right to negotiate separately the terms and conditions or all or any part of the proposals as deemed to be in the City's best interest at its sole discretion.

Information and/or factors gathered during interviews, negotiations and any reference checks, and any other information or factors deemed relevant by the City, shall be used in the final award. The final award of a contract is subject to approval by the City of Cleveland, Board of Control.

The City assumes no liability for any costs incurred in preparing or submitting any proposals.

Award of Contract

Award of contract will be made to one or more Vendor(s) whose proposal provides the most favorable solution to the City. The Vendor shall be deemed as having been awarded a contract when the formal notice of acceptance of his proposal has been duly served upon the intended awardee by an authorized agent of the City.

Advice of Omission or Misstatement

In the event it is evident to a Vendor responding to this RFQ that the City has omitted or misstated a material requirement to this RFQ and/or the services required by this RFQ, the responding Vendor shall advise the Contact identified in the "RFQ Clarifications" section above of such omission or misstatement.

Confidential Information

Information contained in the Vendor's proposal that is company confidential must be clearly identified in the proposal itself. The City will be free to use all information in the Vendor's proposal for the City's purposes. The Vendor understands that any material supplied to the City may be subject to public disclosure under the Freedom of Information Act.

Confidentiality Statement

Any information, including materials, drawings, designs, documentation, and other property or data, disclosed to the proposal responder shall not be used, reproduced, appropriated, or otherwise disseminated to anyone other than the City.

Tax Exempt Status

The City is exempt from Ohio State sales and use taxes on materials and equipment to be incorporated in the work. Tax Payer Id No. 34-6000646. Said taxes shall not be included in the RFQ.

Advertising

Vendor shall not advertise or publish the fact that the City has placed this order without prior written consent from the City, except as may be necessary to comply with a proper request for information from an authorized representative of a governmental unit or agency.

Trademarks

The City warrants that all trademarks the City requests the Vendor to affix to articles purchased are those owned by the City and it is understood that the Vendor shall not acquire or claim any rights, title, or interest therein, or use any of such trademarks on any articles produced for itself or anyone other than the City.

Right to Request Additional Information

The City reserves the right to request any additional information that might be deemed necessary after the completion of this document.

Right of Refusal

The City reserves the right to refuse any or all proposals in their entirety, or to select certain professional services, equipment or software products from various Vendor proposals, based on the best interests of the City.

Proposal Preparation Costs

The Vendor is responsible for any and all costs incurred by the Vendor or his/her subcontractors in responding to this RFQ.

Compliance with the Cleveland Area Business Code

The City of Cleveland is committed to providing opportunities for minority-owned businesses, female-owned businesses, and Cleveland-area small businesses to participate in City contracting. The City intends to contract with a Vendor that shares that commitment.

If the vendor has intention to subcontract a portion of their work; the standard subcontracting goal for professional services contracts is 10% Cleveland Area Small Business ("CSB") subcontractor participation. Please review any attached documents to review the goal for this contract. Proposers are required to make a good faith effort to subcontract with certified Minority Business Enterprise ("MBE"), Female Business Enterprise ("FBE") and CSB firms in line with the applicable subcontracting goals included in this request for proposal.

To document its good faith effort to use certified MBE, FBE and CSB sub-consultants each proposer must complete Schedules 1 through 4 found in the Cleveland Area Business Code Notice to Bidders and Schedules. These schedules document the use of MBE, FBE and CSB subcontractors on the project, as well as the good faith effort of the Vendor in seeking the participation of certified sub-consultants on the proposed work. The completed forms will be forwarded to the City for evaluation. Failure to submit complete schedules may result in the rejection of your proposal.

Proposers can obtain information on CSBs, MBEs and FBEs that are certified by the City by checking the City's website at <http://www.city.cleveland.oh.us>. From the home page, select Office of Equal Opportunity from the drop down box of City Departments. On the Office of Equal Opportunity page, you will find a selection in the left hand column for the CSB/MBE/FBE Registry.

Proposers are responsible for obtaining the most current list and for contacting potential CSB/MBE/FBE sub-consultants. The City assumes no responsibility for matching prime consultants with qualified MBE, FBE, and/or CSB sub-consultants.

The participation of MBE, FBE, and/or CSB sub-consultants will be monitored by the Community Development throughout the duration of the project. The successful Vendor will be responsible for providing Community Development with any and all information necessary to facilitate this monitoring.

The Cleveland Area Business Code, Chapter 187 of the Codified Ordinances Cleveland, Ohio, 1976, any Regulations promulgated under the Code, and the CD Notice to Bidders & Schedules are incorporated in and made part of this solicitation and any resulting contract, by this reference, as fully as if attached.

EQUAL OPPORTUNITY CLAUSE

No Proposer shall discriminate against any employee or applicant for employment because of race, religion, color, sex, sexual orientation, national origin, age, disability, ethnic group or Vietnam-era or disabled veteran status. Contractors shall take affirmative action to ensure that applicants are employed and that employees are treated during employment without regard to race, religion, color, sex, sexual orientation, national origin, age, Disability, ethnic group or Vietnam-era or disabled veteran status. As used in this chapter, "treated" means and includes without limitation the following: recruited whether by advertising or other means; compensated, whether in the form of rates of pay or other forms of compensation; selected for training, including apprenticeship, promoted, upgraded, demoted, transferred, laid off and terminated. Contractors shall post in conspicuous places available to employees and applicants for employment, notices to be provided by the hiring representative of contractors setting forth the provisions of this nondiscrimination clause.



This Request For Qualifications (RFQ) document is the property of the City of Cleveland Department of Community Development. It contains proprietary information about the business of the City of Cleveland.