

The Cities of
Carlsbad, Escondido, Oceanside, San Marcos
and Vista

Request for Proposals

For a

Branding Consultant

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SECTION 1: NOTICE OF REQUEST FOR PROPOSALS

1.1 Notice

The cities of Carlsbad, Escondido, Oceanside, San Marcos and Vista (Collectively "Cities") are collaborating to bring prosperity to the North County region through economic development. Part of that process is to develop a comprehensive brand identity that will define North County to appropriate economic development targets.

The work to be done is described in Section 3, Specifications for Branding. Copies of the Request for Proposals (RFP) are available from the Carlsbad, Escondido, Oceanside, San Marcos and Vista Economic Development websites and offices.

1.2 Due Dates

The response to this RFP must be received no later than 5 p.m., Thursday, January 10, 2013. The proposal must be mailed or delivered to the City of Vista, Attention: Kevin Ham, Economic Development Director, 200 Civic Center Drive, Vista, California 92084. The outside of the envelope should identify it as RFP-Branding. The CITIES reserves the right to reject any and all proposals, and to waive any irregularity.

SECTION 2: DESCRIPTION OF ORGANIZATION

2.1 Overview

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 617,000, an average age of 36.8 years, and an average household income of about \$80,000. The area boasts a range of housing from rental and starter homes to large lots and executive homes.

With regard to major transportation systems with freeway access, the Cities have: to the east - north-south bound Interstate 15; to the west - north-south bound Interstate 5; and to the east-west - Highway 78 which travels from Escondido west to San Marcos, Vista, Oceanside and Carlsbad. The North County region is also a light rail transportation hub with the Sprinter, an east-west light rail with stops in Escondido, San Marcos, Vista, and Oceanside and connections to Carlsbad and San Diego to the south; and the Coaster which travels south from the Oceanside Transit Center to the Carlsbad Transit Center all the way to San Diego.

The amenities in the region are varied and appeal to a variety of people of all ages. Some of the most notable are: LegoLand (Carlsbad); San Diego Zoo Safari Park (Escondido); San Luis Rey Mission (Oceanside); The Vista Craft Brewing Cluster of eight craft brewing establishments and tasting rooms; California Center for the Arts

(Escondido); Oceanside Museum of Art; Moonlight Amphitheater (Vista); San Marcos Restaurant Row; Stone Brewing Company (Escondido); The WAVE water park (Vista); Cal State San Marcos; 1,000 slip boat harbor and marina; 1,946 foot fishing pier; regional airport, McClellan-Palomar Airport (Carlsbad); Oceanside Municipal Airport; 13 golf courses; 6,000 hotel rooms; day spas and resorts; many regional and local parks; six lakes; skate parks; lake and beach camping areas and 10.5 miles of beaches; hiking trails; biking trails including the coastal rail trail and San Luis Rey bike path; regional car dealerships; regional shopping malls; and a range of museums.

2.2 Specific City Details

CARLSBAD

The City of Carlsbad, incorporated in 1952, is a scenic coastal community located in North San Diego County, 35 miles north of downtown San Diego and 54 miles south of the John Wayne Airport in Orange County. The city's population is 107,000 and covers 39 square miles, 40 percent of which is dedicated to open space, including three lagoons, 46 miles of hiking trails and nearly seven miles of coastline.

The City of Carlsbad offers its residents an enviable range of opportunities for living and working in a community acknowledged for its high quality of life. Its economy is based on a diverse set of industries that offer a range of career opportunities. Important industry clusters in Carlsbad are: life sciences, information and communications technology, action sports manufacturing and clean technology.

OCEANSIDE

Oceanside was incorporated on July 3, 1888, with a population of approximately 1,000. Today, Oceanside is a thriving community with 169,319 residents throughout its 42-square mile area. As the northernmost city in San Diego County along Interstate 5, Oceanside is centrally located between the cities of Los Angeles and San Diego, enjoying proximity to all major Southern California destinations, while maintaining its coastal beauty and autonomy. With 3.5 miles of beach, a 1,000 slip boat harbor, the largest of the California missions, several regional museums, and a 1,946 foot fishing pier, Oceanside offers year-round perfect weather and a perfect tourist destination. Oceanside is also home to Mira Costa College and the Mira Costa Bio-technology program training lab technicians and scientists of tomorrow. Oceanside is committed to providing exceptional services to the residents, visitors, and the business community.

VISTA

The City of Vista was incorporated in 1963 and currently operates as a Charter City. The City has a population of almost 100,000 and is centrally located with a convenient location seven miles from the Pacific Ocean. State Route Highway 78, which bisects the city, carries approximately 131,000 average daily vehicle trips through the city on a typical weekday.

The city is a dynamic and energetic community that complements its natural setting with many cultural, recreational, and shopping opportunities, including the Moonlight Amphitheatre, The WAVE water park, a 27-acre Vista Village complex in the downtown area which includes a creek side walk. The city's Business Park in the southeast portion of the city employs over 23,000 people and has over 14 million square feet of industrial space which includes many global, national, and local companies. Some of the companies that call Vista home include San Diego's largest privately held company, DJO Global, Solatube Daylighting and John Deere Water to name a few. Also, Vista is home to the largest Craft Brewing Cluster (per capita).

ESCONDIDO

Incorporated in 1888, The City of Escondido is located approximately 18 miles inland and 35 miles north of San Diego and is often referred to as the "Heart of North San Diego County." Origins of the City are directly traced to agricultural uses and production, which is evident in its abundance of orchards, nurseries and vineyards. Its close proximity to Interstate 15, the Highway 78 corridor, the Sprinter Light Rail Line and the McClellan-Palomar Airport make it ideally located as both a travel destination and an economic hub for the region.

Escondido is home to the new, state-of-the-art Palomar West regional hospital, the internationally renowned Stone Brewing Co., the world famous San Diego Zoo Safari Park and the California Center for the Arts entertainment and cultural facility.

Escondido boasts a unique, historic downtown, a wide variety of services, acres of open space, cultural amenities and family-oriented neighborhoods. The City offers all the benefits of Southern California while maintaining an authentic identity and affordable cost of living.

SAN MARCOS

The City of San Marcos, incorporated on January 28, 1963, is a progressive community of more than 80,000 residents. San Marcos has miles of trails in the local hills and unique dining and shopping opportunities in its retail centers.

The City is 35-miles south of downtown San Diego, and 12 miles west of the beautiful Pacific Ocean. Although San Marcos has experienced rapid growth over the last decade, it continues to maintain the small town atmosphere and values that attracted many new residents.

San Marcos is home to Palomar College and California State University San Marcos, the City has also become the heart of education in San Diego North.

A dedication to parks and community services is a top priority for the City of San Marcos. In addition to its recreational and cultural programs, the City has constructed 60 miles of trails, 29 new parks and 11 recreation centers over the past 25 years.

Quality community development such as: Creekside Marketplace; Nordahl Center; and Grand Plaza are popular shopping and dining destinations. Plans for thoughtful future developments like the San Marcos Downtown Creek District, Palomar Station and University Village has put San Marcos on the map as a regional shopping, dining and entertainment destination.

2.3 Resources

City's

Carlsbad:

<http://www.carlsbadca.gov/econdev>

Escondido: <http://www.escondido.org/economic-development.aspx>

Oceanside: <http://www.ci.oceanside.ca.us/gov/ecd/overview.asp>

San Marcos: <http://www.san-marcos.net/business>

Vista: <http://www.cityofvista.com/departments/econdev/>

SECTION 3: SPECIFICATIONS FOR BRANDING CONSULTANT

3.1 Scope of Work

The cities of Carlsbad, Escondido, Oceanside, San Marcos and Vista are collaborating to bring prosperity to the North County region through economic development. Part of that process is to develop a regional brand identity that will define North County to appropriate economic development targets.

The brand identity will convey North County's economic strengths, superb quality of life, robust educational systems and other assets in a way that is authentic, succinct and memorable. It will describe who we are, who we are for, what we do, and why we do it.

A visual system is also needed to accompany the brand identity in order to graphically convey the brand message to promote the region.

The development of the brand will involve leaders of our strongest industry clusters and will engage them in our economic development future, enhancing regional economic development efforts by working with several other North County entities.

This effort aligns with the objectives of the Prosperity on Purpose (POP) and the new North County Comprehensive Economic Development Strategy CEDS, which calls for developing "a strong regional identity as a place where "you can do business here" because of the industries, educational system, infrastructure and quality of life that defines North County."

The Branding Initiative is anticipated to include several steps:

- The consultant will meet with the staff of the Cities to learn about the communities and industry clusters.
- The consultant will meet with elected officials and corporate stakeholders to begin developing the brand identity for North County. The consultant should expect to answer the following questions once the process is complete:
 - Who we are – what are the economic development assets of the Cities
 - Who we are for – what business clusters do we excel in and want to build on
 - What we do and why we do it – focusing on the values and future of the Cities
- Based on the input received, the consultant will develop a brand platform for the North County economic development effort.
- The consultant will invite industry and education leaders to give input on the branding. The CEOs of the largest and most innovative businesses in primary

industry clusters, leaders of our higher educational institutions and SDNEDC representatives will be involved in this process.

- A final brand will be created and related deliverables such as an official platform, visual system (name, tagline, logo and visual system) and communications plan will be delivered.

The initiative will be managed by the staffs of Carlsbad, Escondido, Oceanside, San Marcos and Vista.

Specific Tasks:

- A. Facilitation of branding discussions with corporate stakeholders and elected officials:
 1. Determine best alternative to solicit public input and hold meetings, workshops or have private in-person or phone discussions; maximum of five meetings.
 2. Follow-up meetings with staff and elected officials to review results of discussions; maximum of eight meetings
 3. Staff review of draft branding, image, identity; and
 4. Preparation of final report (See D below)
- B. Fully develop the brand, identity, strategy and a roadmap to move forward to include:
 1. Visual image and expression of brand, platform and promise;
 2. Message and tag line;
 3. Recommended website look and collateral material development but not production;
- C. It is the desire of the Cities to begin the project in Spring 2013.
- D. Consultant must summarize the results of meetings with the stakeholder and elected officials and prepare a document that provides a clear path to implement a branding and regional identity campaign.

3.2 Qualifications

The firm or individual responding to this RFP must provide the following:

- A. Evidence of substantial knowledge and experience in developing marketing plans, brands and identities. Please highlight any experience with regional, multi-area organizations and local governments.
- B. Evidence of substantial knowledge and experience in facilitating and developing brands-identities and marketing plans for regional areas or for regional governmental organizations.

3.3 Content and Format of Proposals

The proposals must contain the following information in order to be considered:

3.3.1 Cover Letter

A cover letter on firm letterhead must provide the name and title of the person(s) who are authorized to answer questions about this RFP. The cover letter should not exceed one (1) page in length and should summarize key elements of the proposal. The letter must include the telephone, fax number email address and physical address of your office.

3.3.2 References

Provide the name and contact information for three (3) regional groups, cities, counties, or economic development organizations where Branding plans have been completed and implemented. Provide a copy of up to three (3) completed projects that were similar in scope.

3.3.3 Project Team Description

Provide the names and qualifications of the key individuals who will be responsible for delivering these services, their respective roles and the organizational structure of the team. Technical support staff should be included if they will perform a significant role in the preparation of the work products. If the firm has multiple offices, the office of record for each team member shall be listed as well as the primary office location where the work is to be performed. Include the percent of time that each key individual will spend on the project.

3.3.4 Firm Experience

Provide a summary of projects that are similar in scope (limit to the three most applicable) to the type of study noted herein. The summary should include client name, description, project team, date completed and total project cost.

3.3.5 Process

- A. Describe how you would facilitate the input from local company executives, commissions and stakeholders.
- B. Describe how you would format and handle input from up to five City Councils.
- C. Describe the format for your final marketing plan and branding document.

- D. Provide a summary of the firm's proposed approach to the project. The approach should provide efficient and innovative ways to achieve the scope of work in a cost-effective, timely manner. Include a proposed schedule for the product delivery. Provide a statement of time commitment by the firm to this project that justifies the firm's ability to complete the project on schedule and on budget.

3.3.6 Cost

Please provide "not to exceed" costs for the following categories:

- A. Preparatory meetings with Mayors, Councilmembers, City Managers, and City Staff (Maximum of five days);
- B. Meetings with businesses and stakeholder groups (maximum of five days);
- C. Up to Six (6) meetings with staff to discuss outcomes and Branding Platform;
- D. One (1) follow-up meeting with the five City Mayors and City Councils to review results; and
- E. Preparation of final report.

The total amount available under this RFP will not exceed \$100,000.

3.4 Consultant's Responsibilities

3.4.1 Consultant is an Independent Contractor

The Consultant shall act under the agreement as an independent contractor and will not be an agent or employee of the Cities.

3.4.2 Compliance with the Law

The Consultant agrees that performance under the Agreement shall comply with applicable laws of the federal government and State of California, as well as all applicable policies and regulations of the Cities.

3.4.3 Insurance Requirements

Once the contract is awarded, the Consultant must show proof of insurance. A certificate of insurance and endorsement will be required indicating compliance with the following minimum insurance requirements and the contractor shall maintain such insurance in effect during the entire term of the Agreement with the Cities.

- A. Workers' Compensation Insurance to cover the contractor's employees as required by the California Labor Code. Before execution of an agreement by the Cities, contractor shall file with the Cities a signed Worker's Compensation Insurance Certification. In the event that the contractor has no employees, it will be required to file a certification that the contractor has no employees. The Cities and its officers, employees, and agents will not be responsible for any claims in the law or equity occasioned by failure of contractor to comply with its Agreement with the Cities.

- B. Commercial General Liability, personal injury and property damage liability, contractual liability, independent contractor's liability, and automobile liability insurance, with minimum combined liability limits of One Million Dollars (\$1,000,000) per occurrence, and a maximum of deductible of One Thousand Dollars (\$1,000) per occurrence. Each such policy of insurance shall:
 - 1. Be issued by companies that hold a current policy holder's alphabetic and financial size category rating of not less than A-VII, according to the current Best's Key Rating Guide or a company of equal financial stability that is approved by the Cities Risk Manager for all coverages except surety.
 - 2. Name and list as additional insureds the Cities, Cities's officers, employees, and agents. An endorsement shall accompany the insurance certificate naming such additional insureds.
 - 3. Specify it acts as primary insurance and that no insurance held or owned by the Cities shall be called upon to cover a loss under said policy.
 - 4. Contain a clause substantially in the following words: "it is hereby understood and agreed that this policy may not be canceled or materially changed except upon 30 days prior written notice to the Cities of such cancellation or material change as evidenced by a return receipt for a registered letter."
 - 5. Cover the operations of the contractor pursuant to the terms of this the Agreement; and
 - 6. Be written on an occurrence and not on a claims made basis.

3.4.4 Equal Employment Opportunity

The Consultant shall not discriminate against any employee or applicant for employment because of race, creed, color, sex, national origin, age or disability. The Contractor shall ensure that all employees and applicants for employment shall be treated with equality in all aspects of employment processes including, but not limited to, hiring, transfer, promotion, training, compensation and termination, regardless of their race, creed, color, sex, national origin, age or disability.

SECTION 4: INSTRUCTIONS FOR SUBMITTING PROPOSALS

4.1 Delivery of Proposals

All Proposals shall be typewritten or printed in ink clearly and legibly in conformance with the Instruction for Submitting Proposals, in accordance with section 1.5, and submitted in a sealed envelope plainly marked on the outside, "**SEALED PROPOSAL FOR CARLSBAD, ESCONDIDO, OCEANSIDE, SAN MARCOS AND VISTA, BRANDING CONSULTANT – DO NOT OPEN WITH REGULAR MAIL.**" The Proposal shall be signed by an authorized agent of the Consultant. Ten original copies of the proposal shall be delivered along with one CD or thumb drive containing the proposal in electronic format.

Any proposals received by the City of Vista, Economic Development Office after the specified hour and date will not be accepted. Postmarks will not be acceptable in lieu of actual receipt prior to the prescribed hour and date.

4.2 Proposal Documents

The Proposal Documents must comply with this RFP and must respond to all requested information. The emphasis of the proposal should be on responding to the requirements set forth in this RFP.

4.3 Interpretations of the Request for Proposals

If the Consultant is in doubt as to the true meaning of any part of the RFP, or finds discrepancies in or omissions from the RFP, the Consultant can submit questions by email to Michelle Geller at mgeller@escondido.org. All questions and answers will be posted on the City of San Marcos website at www.san-marcos.net/rfps. The Consultants shall be responsible for the prompt delivery of questions and must comply with the specified due date.

The Cities shall not be responsible for any explanation or interpretations of the RFP other than by written notice. No oral interpretations of any provision in the RFP shall be binding upon the Cities.

4.4 Review of Proposals

All proposals shall be reviewed and evaluated for responsiveness to the RFP in order to determine whether the Consultant possesses the professional qualifications necessary for the satisfactory performance of the services required. Qualifications of all Consultants to whom the PSA is contemplated will be investigated. The staff of the Cities and the City Managers from Carlsbad, Escondido, Oceanside, San Marcos and Vista will be involved in the review of the proposals. It is anticipated that this review period will last approximately thirty (30) to sixty (60) days. The City Council's will ultimately select the consultant.

In reviewing the proposals, the Cities will consider the following:

- The experience and past performance of the Consultant, its agents, employees and subcontractors in completing projects of a similar type, size and complexity.
- The Cities shall consider Consultant's timely and accurate completion of similar projects within budget.
- The Consultant's understanding of the work to be completed based upon the clarity of the proposal and responsiveness to this RFP.
- Evaluation criteria include, but are not limited to, the understanding of the proposed requirements as evidenced by the quality of the proposal response, relevant experience conducting similar Branding efforts for economic development organizations, qualifications of staff to be assigned, project understanding, recent experience and proposal costs. The Cities may not select the lowest cost consultant.

4.5 Review Schedule

01-10-2013	RFP due date
01-16 / 01-17	Staff to review RFP's received
01-23-2013	Conduct consultant interviews - Vista City Hall, 11am to 4pm
01-24-2013	Conduct consultant interviews - Vista City Hall, 8am to 2pm
01-29-2013	Recommendation from staff on selected contractor

5. **Award of Professional Service Agreement**

Upon completion of the review period, Consultants whose proposals will be considered for further evaluation will be notified. All Consultants so notified will be required to make presentations and negotiate in good faith.

The Cities reserves the right to reject any or all proposals, and to waive any irregularities. The award of the Agreement, if made by the Cities, will be based upon a total review and analysis of each proposal and projected costs.

Once a Consultant has been selected, Consultant and the Cities will negotiate an Agreement. The Cities shall not be contractually obligated to any Consultant until duly authorized representatives of both the CONSULTANT and the Cities sign and approve and fully execute an agreement. The Agreement shall obligate the Consultant to defend, indemnify and hold the Cities of Carlsbad, Escondido, Oceanside, San Marcos and Vista its officials and employees harmless from and against any claims for damages arising from the work performed by the Consultant.