



**REQUEST FOR PROPOSALS
for
MARKETING AND PUBLIC RELATIONS**

RFP No.420

by

OPTIONS FOR YOUTH-SAN JUAN, INC.

SEND ALL PROPOSALS VIA EMAIL AS A SINGLE PDF DOCUMENT TO:

**Melissa Nelson
Assistant Principal of Instructional Operations
mnelson@ofy.org**

DUE DATE: March 25, 2022

**Notice of Request for Proposals
Marketing and Public Relations
RFP No. 420**

Notice is hereby given that Options for Youth-San Juan, Inc. (hereinafter referred to as “**OFY-SJ**”) is requesting proposals for one or more providers of Marketing and Public Relations (hereinafter referred to as “**Proposer[s]**”) to assist with OFY-SJ’s operation of its charter school programs in Sacramento, California.

OFY-SJ will accept all proposals received on or before March 25, 2022.

OFY-SJ will not accept proposals that are received after the deadline.

Proposers must submit written proposals **via email as a single PDF document** to Melissa Nelson, Assistant Principal of Instructional Operations, at mnelson@ofy.org.

Proposers do not have to submit a proposal covering the entire Scope of Work. OFY-SJ will accept proposals covering all or any portion of the services described in the Scope of Work. All proposals must clearly and specifically indicate which services are included in the proposal.

This RFP and any amendments are available on OFY-SJ’s website at <https://ofy-sj.org/notices/rfp/>. OFY-SJ will record and provide answers to any questions or requests for clarifying information about the RFP during the question and answer period.

OFY-SJ will hold an **Optional** Tour of our facilities on
Friday, March 11, 2022 at 10:00 a.m.
Location: 5825 Windmill Way Carmichael, CA 95608

Proposers should not construe from this RFP that OFY-SJ intends to enter into a contract with the Proposer unless, in the opinion of OFY-SJ, it is in the best interest of OFY-SJ to do so. OFY-SJ reserves the right to negotiate final contractual terms with the successful Proposer(s).

OFY-SJ also reserves the right to reject any or all proposals, and to waive any errors or corrections in a proposal or in the proposal process. OFY-SJ will award the contract based on a review and analysis of the proposals that determines which proposal best meets the needs of OFY-SJ. Following the review and analysis of all responsive proposals, OFY-SJ staff will make a recommendation to the OFY-SJ Board of Directors at a duly noticed Board meeting.

**Request for Proposals
Table of Contents**

INTRODUCTION/PURPOSE OF SOLICITATION	4
SCHEDULE OF EVENTS	6
GENERAL INSTRUCTIONS FOR PROPOSERS	7
PROPOSAL REQUIREMENTS	9
EVALUATION OF PROPOSALS	11
ATTACHMENTS	
ATTACHMENT A – OPTIONAL TOUR	12
ATTACHMENT B – ATTACHMENTS CHECKLIST	13
ATTACHMENT C – MINIMUM QUALIFICATIONS	14
ATTACHMENT D – PROPOSAL QUESTIONNAIRE	15
ATTACHMENT E – PROPOSER REFERENCES	16
ATTACHMENT F – AUTHORIZATION AGREEMENT	18
ATTACHMENT G – FEE PROPOSAL	19
EXHIBIT 1 - SCOPE OF WORK	20

Introduction/Purpose of Solicitation

The purpose of this RFP is to enter into a contract with one or more providers of Marketing and Public Relations that will provide OFY-SJ with assistance in the operation of its California public charter school located in Sacramento, California. The winning Proposer will provide services to OFY-SJ as described in RFP Exhibit 1, Scope of Work.

Through this RFP, OFY-SJ seeks to promote maximum open and free competition consistent with applicable federal and state laws and standards. Outlined below are examples of basic competitive bidding standards OFY-SJ will use in the issuance of this RFP:

- OFY-SJ is soliciting competitive proposals in order to secure public objectives in the most effective manner and avoid the possibilities of fraud, collusion, etc.
- OFY-SJ released this RFP to benefit OFY-SJ and not the Proposers.
- Fulfillment of RFP specifications is based on full and fair competition and acceptance by OFY-SJ of the Proposer who meets OFY-SJ's requirements, as determined by OFY-SJ when evaluating proposals, based on the criteria contained in the RFP.
- The RFP provides a basis for full and fair competition among Proposers to a common standard, free of restrictions that tend to stifle competition.

The above four points are for illustrative purposes only.

To respond to this RFP, interested Proposers must present evidence of experience, ability, and financial standing necessary to meet the requirements stated in this RFP. OFY-SJ will measure this evidence by scoring the proposals using a point system that will rank each proposal from highest to lowest, to determine which proposals they will consider for the award of a contract.

To be competitive in this solicitation, the Proposer must:

- Carefully read the entire RFP, attachments, exhibit, and OFY-SJ responses to questions before submitting a proposal.
- Ask appropriate questions or request clarification before the deadline in the RFP.
- Submit all required information by the required deadlines.
- Follow all instructions and requirements of the RFP thoroughly and appropriately.

If a Proposer discovers any ambiguity, conflict, discrepancy, omission, or other errors in this RFP, the Proposer shall immediately notify OFY-SJ of the error in writing and request clarification or a modification of the RFP. If the Proposer fails to notify OFY-SJ of the error prior to the date for submission of proposals, and is awarded the contract, the Proposer shall not be entitled to additional compensation or time by reason of the error or its later correction.

Background Information

OFY-SJ proudly serves 1,100 students and their families at its four sites. OFY-SJ is a year-round public charter school that serves 7th grade to 12th grade students, who range in age from 14 to 24 years old.

At OFY-SJ, our mission is to create an educational choice for all students. Our staff connects with students to empower and inspire them to achieve their goals and make their dreams a reality. Our students enroll with us to meet various unique needs. Some students enroll to accelerate their progress toward their high school diploma so that they are able to graduate sooner than they might in traditional school. Others are falling behind in a traditional setting and are seeking academic recovery. Additionally, some students attend OFY-SJ to eliminate some of the stressors associated with larger class sizes, increased student population and intimidating social demands of traditional high school settings. Our school offers both independent study courses and small group instruction. Independent studies provide students with the space to work at their own pace and develop a heightened sense of accountability. Our small group instruction courses offer a classroom setting with fewer students than a traditional school, in order to maximize support for access to rigorous common core content. In our blended model of independent study and small group instruction, students are encouraged to take ownership of their education while still receiving the one-on-one support they need to successfully progress toward earning a high school diploma.

OFY-SJ currently operates at four learning center locations:

Howe Center

1508 Howe Ave. Ste. 100
Sacramento, CA 95825

Carmichael Center

5825 Windmill Way
Carmichael, CA 95608

Arden Center

2125 Fulton Ave. Ste. 100
Sacramento, CA 95825

Orangevale Center

9470 Madison Ave.
Orangevale, CA 95662

**Schedule of Events
for
RFP No. 420**

- Release of RFP_____Feb 28, 2022
- Optional Tour_____Mar 11, 2022
- Proposer Question Submission Deadline_____Mar 11, 2022
- OFY-SJ Provides Answers_____On or before March 21, 2022
- Deadline for Submission of Proposal_____March 25, 2022
- Board Meeting – Proposal Approval_____On or about May 2022
- Anticipated Contract Effective Date_____July 1, 2022

OFY-SJ will make every effort to adhere to the schedule. However, OFY-SJ staff reserves the right to amend the schedule, as necessary, and will post a notice of said amendment at <https://ofy.sj.org/notices/rfp/>.

General Instructions for Proposers

1. Prepare proposals simply and economically. Provide a straightforward concise description of the Proposer's capability to satisfy OFY-SJ's requirements. Emphasis should be placed on completeness and clarity of content.
2. Submit proposals for the performance of all or any portion of the services described within this RFP. All proposals must clearly and specifically indicate which services are included in the proposal.
3. OFY-SJ may reject a proposal if the proposal is conditional or incomplete, deemed non responsive, or if it contains any alterations of form or other irregularities of any kind. OFY-SJ may reject any or all proposals or waive any immaterial deviation in a proposal. OFY-SJ's waiver of an immaterial deviation shall in no way modify the RFP or excuse the Proposer from full compliance with all other requirements if awarded the contract.
4. Proposers are responsible for the costs of developing proposals, and shall not charge OFY-SJ for any preparation costs.
5. Proposers may modify their proposal after submission by withdrawing the original proposal and resubmitting a new proposal prior to the submission deadline.
6. Proposers may withdraw their proposal by submitting a written withdrawal request to OFY-SJ, signed by the Proposer or their authorized agent, through the contact person named in the "Contact Information" provided in response to this RFP. Thereafter, a Proposer may submit a new proposal prior to the proposal submission deadline. Proposers may not withdraw their proposal without cause after the proposal submission deadline.
7. OFY-SJ may modify the RFP prior to the date given for submission of proposals by posting an amendment on <https://ofy-sj.org/notices/rfp/>. OFY-SJ will notify Proposers so they can obtain any amendment from OFY-SJ's Web site, or request it by e-mail.
8. OFY-SJ reserves the right to reject all proposals for any reason and at OFY-SJ's discretion. OFY-SJ is not required to award a contract.
9. Any proposals and resulting contract(s) will be public documents reviewed by the OFY-SJ Board of Directors at a public meeting. Proposers understand that such documents will not be kept confidential.
10. OFY-SJ will not consider more than one proposal from an individual, firm, partnership, corporation, or association under the same or different names. Reasonable grounds for believing that any Proposer has submitted more than one proposal for work contemplated herein will cause OFY-SJ to reject all proposals submitted by the Proposer. If there is reason to believe that collusion exists among the Proposers, OFY-SJ will not consider any of the participants of such collusion in this or future solicitations.
11. OFY-SJ will not consider a joint proposal submitted by two or more entities.
12. Additional charges for regular or express delivery, parcel post, packing, cartage, insurance, license fees, permits, or for any other purpose shall be included (and separately identified) in the proposal.

13. All proposals shall include the forms provided as attachments to this RFP, except that Proposers may provide cost information in an alternative format that better suits the type of services and pricing structure in the proposal, as long as it provides a description and breakdown of all costs included in the proposal. Proposers may copy these forms. A proposal is considered responsive if it follows the required format, includes all attachments, and meets all deadlines and other requirements outlined in this RFP.
14. Unless the deadline is extended at OFY-SJ's discretion, OFY-SJ shall not accept proposals after the submission deadline specified in the RFP.
15. Proposers are responsible for examining the entire RFP, seeking clarification for any item or requirement that may not be clear to them, and checking all responses in their proposal for accuracy before submitting it.
16. Proposers may submit their questions regarding the information presented in this RFP to Melissa Nelson by e-mail to mnelson@ofy.org, no later than 5pm on the date set forth above. OFY-SJ will answer all questions received by the deadline in writing without exposing the query source. Proposers may not contact any other OFY-SJ employees directly to ask questions.
17. OFY-SJ representatives reserve the right to inspect a Proposer's operations prior to any award of a contract.
18. OFY-SJ reserves the right to negotiate the final terms and conditions of the contract, including the Scope of Work, which may differ from those contained in the proposal, provided OFY-SJ considers such negotiation to be in its best interest. OFY-SJ may award the full contract to any one Proposer, or may choose to split up the contract between multiple Proposers if in OFY-SJ's best interest.
19. Interested Proposers are invited to inspect OFY-SJ's premises during the Optional Tour prior to submitting a proposal.
20. Proposers shall submit one copy of the proposal via email as a single PDF document to mnelson@ofy.org. Proposers must ensure that the proposal is complete and inclusive of all materials required under this RFP, including any required signatures. Digital signatures are acceptable as long as the signatory intended it to have the same effect as a handwritten signature.

Proposal Requirements

To be eligible for evaluation, a proposal must adhere strictly to the format set forth below; failure to do so may result in disqualification. Proposers must complete, label, and separate each section, and number all pages. The content and sequence of the proposal will be as follows:

Section	Title
1.	Cover Letter
2.	Table of Contents
3.	Attachments Checklist
4.	Minimum Qualifications
5.	Proposal Questionnaire
6.	Proposer References
7.	Authorization Agreement.
8.	Fee Proposal

1. Cover Letter

Only the individual(s) authorized to bind the Proposer contractually may sign the cover letter, which shall be a part of the proposal package. OFY-SJ may reject the proposal if the Proposer fails to include the following required information:

- Name and address of responding company;
- Organizational structure of the responding company (e.g., corporation, partnership, etc.);
- Proposer's Federal Employee Identification Number and Corporate Identification Number, if applicable;
- Name, title, phone number, fax number, and e-mail address of the representative who will be designated as the primary liaison to OFY-SJ;
- Name, title, phone number, and e-mail address of the representative(s) authorized to bind the Proposer in a contract if different from the primary liaison;
- A statement expressing the Proposer's willingness to perform all or some the services described in this RFP;
- A statement expressing the Proposer's ability to perform all or some the services required in the Scope of Work, including availability of staff and other required resources to meet all deliverables as described in this RFP; and
- The following certification:

By signing this cover letter, I (we) certify that the information contained in this proposal is accurate and that all attachments required to be submitted as part of the proposal are certified to be true and binding upon our company.

2. Table of Contents

Immediately following the cover letter, include a comprehensive Table of Contents that lists all submitted proposal sections, subsections, attachments, and materials.

3. Attachments Checklist

The Proposer shall include all documents identified in the Attachments Checklist (Attachment B). OFY-SJ may reject proposals that do not include the proper required attachments.

4. Minimum Qualifications

OFY-SJ will only consider Proposers that **meet all minimum qualifications** (as listed on Attachment C).

5. Proposal Questionnaire

The Proposal Questionnaire (Attachment E) is intended to provide OFY-SJ with specific information concerning the Proposer's capability to provide services as described in this RFP. Proposers should limit their responses to the number of pages noted in the questionnaire and answer each question in the same order.

6. Proposer References

Proposers must provide two references on the Proposer References form (Attachment F). OFY-SJ reserves the right to contact any of the references listed, and retains the right to conduct reference checks with individuals and entities beyond those listed.

7. Authorization Agreement

The Proposer or their authorized representative must sign the Authorization Agreement (Attachment G) and return it with the proposal package.

8. Fee Proposal

The Proposer must complete the Fee Proposal (Attachment H) and return it with the proposal package. Proposers may provide cost information in an alternative format that better suits the type of services and pricing structure in the proposal, as long as it provides a description and breakdown of all costs included in the proposal.

Evaluation of Proposals

Proposals will be opened on or after the date specified in the Schedule of Events. During the evaluation process, OFY-SJ may ask Proposers to clarify information in the proposals, but Proposers may not change their proposals.

An error in the proposal may cause OFY-SJ to reject that proposal; however, OFY-SJ may, at its sole discretion, retain the proposal and make certain corrections. When determining if a correction will be made, OFY-SJ will consider the conformance of the proposal to the format and content required by the RFP and that the Proposer's intent is clearly established based on review of the whole proposal.

OFY-SJ will open proposals to determine if they contain all the required information in accordance with this RFP. OFY-SJ will evaluate qualifying proposals using the following criteria:

CRITERIA	MAXIMUM POINTS
Administrative Requirements: did the Proposer include all required information in accordance with the General Instructions and Proposal Requirements?	5
Did the Proposer demonstrate experience with and an understanding of the Marketing and Public Relations that are included in the proposal?	10
Based on the Proposal Questionnaire responses and the Cover Letter, did the Proposer demonstrate a complete understanding of OFY-SJ's service requirements, as described in the RFP and the Scope of Work?	10
Does the Proposer have the requisite capability and experience to perform those services included in the proposal to OFY-SJ's satisfaction, as measured by performance record, years in the industry, relevant charter school experience, number of other schools served, client retention and satisfaction, and references?	15
Cost	10
TOTAL POINTS	50

OFY-SJ will score and rank selected proposals by assigning a score between zero and the maximum score to each proposal criterion. OFY-SJ will recommend awarding the contract to the Proposer with the highest total proposal score.

Attachment A Optional Tour

The Optional Tour will include an escorted tour.

- The tour schedule includes the site listed below.
- Prospective Proposers may not contact any sites or employees outside of the scheduled visit.
- OFY-SJ requests that Proposers do not take pictures during the tour as OFY-SJ has not obtained releases from parents, students, and employees.

Please reach out to Melissa Nelson (mnelson@ofy.org) if you would like to attend the optional tour on March 11, 2022 at 10:00 am

Location: 5825 Windmill Way Carmichael, CA 95608

All potential Proposers are encouraged to attend before submitting a proposal. All individuals will be required to follow the school's COVID-19 guidelines, such as providing a vaccination card or proof of a negative test result 72 hours prior to visit.

OFY-SJ thanks all Proposers for abiding by our request to keep the disruption caused by the visit to a minimum.

Attachment B
Attachments Checklist

Proposer Company Name

Please complete this checklist to confirm that the items listed below have been included in your proposal. Place a checkmark or “x” next to each item submitted to OFY-SJ. For your proposal to be considered, all required attachments must be returned, including this checklist. Submit one copy of your proposal in a sealed package.

Section Title

- _____ 1 Cover Letter
- _____ 2 Table of Contents
- _____ 3 Attachments Checklist
- _____ 4 Minimum Qualifications
- _____ 5 Proposal Questionnaire
- _____ 6 Proposer References
- _____ 7 Authorization Agreement
- _____ 8 Fee Proposal

Attachment C
Minimum Qualifications

A Proposer must meet all of the following minimum qualifications to OFY-SJ's satisfaction to be given further consideration. Failure to satisfy any of the minimum qualifications may result in the immediate rejection of the proposal.

Both the Proposer's company and its key personnel currently meet all of the following minimum qualifications:

1. The Proposer has at least three years of experience with providing Marketing and Public Relations.

Yes _____ No _____

2. The Proposer has knowledge and experience working with California charter schools.

Yes _____ No _____

3. The Proposer has professional references that demonstrate and evidence the ability to perform the required services.

Yes _____ No _____

4. The Proposer is licensed to do business in the state of California.

Yes _____ No _____

Attachment D

Proposal Questionnaire

This proposal questionnaire is intended to provide OFY-SJ with specific information concerning the Proposer's capability to provide services as described in the RFP. Please be as concise as possible and limit your responses **to no more than two pages per question, unless instructed otherwise. Type each question in the same order as listed in the questionnaire.**

1. Provide a general description of your mission/vision.
2. Provide a statement indicating the year your company was founded; what the primary business(es) of the company is(are); the length of time the company has been providing Marketing and Public Relations as described in this RFP. In addition, provide the duration and extent of experience the company has with providing any similar services.
3. Provide a general description of your company's qualifications and experience relevant to the minimum qualifications in Attachment C, along with any necessary substantiating information. Limit your responses to information about your company's capabilities.
4. Provide a general description of your company's experience with California charter schools.
5. Provide a general description of how your company will be able to provide the experience, ability, and financial standing necessary to meet the requirements set forth in this RFP.
6. Are you able to agree to 100% of the scope of work? If not explain why?
7. Provide an organization chart for your company, a description of the lines of communication, and the responsibilities at each company level. In addition, please provide resumes of key staff members.
8. Provide a recommended transition plan that describes the steps the Proposer will take to begin providing the services described in this RFP.

Attachment E Proposer References

List at least two references to which the Proposer has provided Marketing and Public Relations within the past five year(s). Failure to complete and return this Attachment will cause your proposal to be rejected.

Reference 1		
Name of Reference		
Street Address		
City	State	Zip Code
Contact Person	Contact Title	Contact Phone Number
Brief Description of Services Provided		
Dates of Service		
School Size (if applicable)		
Reference 2		
Name of Reference		
Street Address		
City	State	Zip Code
Contact Person	Contact Title	Contact Phone Number
Brief Description of Services Provided		
Dates of Service		
School Size (if applicable)		
Reference 3 (optional)		
Name of Reference		
Street Address		
City	State	Zip Code
Contact Person	Contact Title	Contact Phone Number
Brief Description of Services Provided		
Dates of Service		

School Size (if applicable)

Attachment F
Authorization Agreement

Request for Proposal for Marketing and Public Relations
RFP No. 420

We, [*Enter Company Name*], by our signature on this document certify the following:

1. That we will operate in accordance with all applicable California state and federal laws and regulations.
2. That the terms, conditions, warranties, and representations made within this RFP and our proposal shall be binding upon us and shall be considered a part of the contract as if incorporated therein.
3. That the proposal submitted is a firm and irrevocable offer good for one year.
4. That we have made examinations and verifications, and are fully conversant with all conditions under which services are to be performed for OFY-SJ.
5. That negligence in the preparation or presentation of, errors in, or omissions from proposals shall not relieve us from fulfillment of any and all obligations and requirements in the resulting contract.

Company Name: _____

Address: _____

City: _____ State: _____ Zip: _____

E-mail Address: _____

Web Site Address: _____

Name of Authorized Representative: _____

Title of Authorized Representative: _____

Signature of Authorized Representative

Date Signed: _____

Attachment G
Fee Proposal

Proposer Instructions

- Provide a breakdown of all costs included in the fixed price, including personnel costs.
- Clearly identify all costs
- Proposer may provide cost information in an alternative format as long as it provides a description and breakdown of all costs included in the proposal

Item #	Description of Services	Annual Cost
1.		\$
2.		\$
3.		\$
4.		\$
5.		\$
6.		\$
7.		\$
8.		\$
GRAND TOTAL		

RFP EXHIBIT 1

Scope of Work

I. Marketing

A. Planning & Coordination

1. Consult with school personnel on marketing opportunities in the community
2. Creation and execution of marketing plans, proposals, and budgets on behalf of the school
3. Coordination of marketing plans and ad deployment approvals
4. Obtain vendor ad specifications
5. Source and recommend marketing materials as requested by school personnel
6. Maintain an organized school asset database (photos, logos, video clips, design files)

B. Advertising

1. Graphic design and copywriting for digital and print ads
2. Design and deployment of email campaigns
3. Creation and maintenance of logos and signage files
4. Live action script development, filming, and editing for video advertisements
5. Art and copy file submission to digital and print advertisers
6. Management of digital ad campaigns through Google, Bing, Facebook/Instagram, and other online platforms, including budgets and keyword performance
7. Ad performance reporting, analysis, and communication

C. Websites & Social Media

1. Maintain several social media accounts across various platforms
2. Regularly create, post, and share social media content
3. Build and update/ maintain charter and campus-level websites
4. Create and maintain digital lead forms and distribution routes and rules
5. Recommend web contractors and security solutions as appropriate

D. Student Recruitment

1. Assist with preparing student recruitment materials, such as flyers, print ads, social media materials, etc.
2. Consult with school personnel on student recruitment opportunities in the community

II. Public Relations

A. Press Releases

1. Write press release drafts and circulate to school personnel for approval
2. Distribute approved press releases to local media entities and follow-up as necessary
3. Create positive news coverage for the school and assist with building community support

B. Other Communications

1. Assist with drafting communications to staff, parents, students, and other stakeholders as requested by school personnel
2. Identify positive school events, activities, or news and assist with creating marketing content across various mediums
3. Approach media outlets to distribute materials related to school events, activities, or news
4. Monitor online activity about the school and consult with school personnel on strategies to maintain a positive online presence

III. Photography & Videography

A. Graduations

1. Film students at regional senior social events prior to graduation ceremonies
2. Edit senior social student footage for “reflections” video to be played as a part of each respective graduation ceremony
3. Film every graduation ceremony
4. Edit graduation ceremony footage for public distribution
5. Produce and ship hard copies as requested by the school
6. Maintain organized drives of all video footage collected with regular back-ups and archival standards
7. Maintain adequate video and audio equipment

B. Misc. Events

1. Film and/or photograph various events as requested by school personnel, such as senior signing nights and engineering challenges
2. Edit and distribute event footage and specifications as requested by school personnel