

City of Carson

Strategic Communications and Marketing Implementation Plan

CITY'S REQUEST FOR PROPOSAL NO. 22-014 / JUNE 14, 2022





Diversity and inclusion are an integral part of Raftelis' core values.

We are committed to doing our part to fight prejudice, racism, and discrimination by becoming more informed, disengaging with business partners that do not share this commitment, and encouraging our employees to use their skills to work toward a more just society that has no barriers to opportunity.



Raftelis is registered with the U.S. Securities and Exchange Commission (SEC) and the Municipal Securities Rulemaking Board (MSRB) as a Municipal Advisor.

Registration as a Municipal Advisor is a requirement under the Dodd-Frank Wall Street Reform and Consumer Protection Act. All firms that provide financial forecasts that include assumptions about the size, timing, and terms for possible future debt issues, as well as debt issuance support services for specific proposed bond issues, including bond feasibility studies and coverage forecasts, must be registered with the SEC and MSRB to legally provide financial opinions and advice. Raftelis' registration as a Municipal Advisor means our clients can be confident that Raftelis is fully qualified and capable of providing financial advice related to all aspects of financial planning in compliance with the applicable regulations of the SEC and the MSRB.

Table of Contents

01

Company Certification and Personnel Verification

31

Subcontractor List

32

Cost Proposal

33

Client Reference List

35

Modification, Changes or Exceptions to the City Contract of Service Agreement Template

37

Affidavit of Non-Collusion and Non-Discrimination

38

Federal Lobbyist Requirements

39

Debarment and Suspension Certificate

40

Certificate of Compliance with Labor Code Section 3700

41

Appendix: Project Approach

June 14, 2022



Ms. Rita McCullum
Purchasing Manager
City of Carson, 701 E. Carson Street, Carson, CA 90745

Subject: Proposal for Strategic Communications and Marketing Implementation Plan (Proposal # 22-014)

Dear Ms. McCullum:

Raftelis is pleased to submit the enclosed proposal for Strategic Communications and Marketing Implementation Plan for the City of Carson. Communicating the value, purpose, and accessibility of City services can be complicated and complex considering our evolving post-pandemic environment, diverse constituency, and crowded Los Angeles metropolitan area. Carson is competing to be heard, seen, experienced, and selected for economic development opportunities.

With a team of senior accredited public relations professionals, Raftelis is experienced in planning and implementing strategic and creative public involvement efforts for local governments that reach all constituents and engages them in a meaningful way. We will support you by designing communication and marketing implementation strategies and tactics that build broader awareness and acceptance for City programs and services. An integrated plan that incorporates research; clear and consistent communications and branding; stakeholder engagement; market understanding; and sector-specific insights will set you up for success.

Raftelis helps local governments and agencies thrive. Advantages our team brings include:

Direct Experience: Our team offers direct experience working for and with local governments. Gina DePinto, APR, who will serve as Project Manager, led award-winning communications for the Port of Long Beach Gerald Desmond Bridge Replacement Project, Orange County Water District, and City of Phoenix prior to serving as Communications Manager for the County of Santa Barbara. In addition, Gina's broad and unique career in communication includes marketing, branding, trade shows, promotions and advertising for consumer products and a touring arena show. I will join Gina as the Project Director. I bring 30 years of experience conducting communication and engagement strategies for communities across the U.S. that raised awareness of issues and programs, changed behaviors and attitudes, and built trust in public organizations.

Specialized Expertise: Our strategic communications team members are accredited in public relations and hold certificates in public participation. We're committed to lifelong learning, ethical practice, and the application of best practices by the leaders in our field. We are excited for the opportunity to bring our experience to bear for the City of Carson and I am happy to talk through anything you see here for further clarification. Raftelis is in good standing with the California Secretary of State.

Sincerely,

A handwritten signature in black ink, appearing to read 'S Villegas'.

Samantha Villegas, APR

*Director of Strategic Communications Services
Authorized to contract on behalf of Raftelis
P: 571.336.8550 / E: svillegas@raftelis.com*

A handwritten signature in black ink, appearing to read 'Gina DePinto'.

Gina DePinto, APR

*Manager, Strategic Communications Services
P: 213.262.9314 / E: gdepinto@raftelis.com*



**State of California
Secretary of State**

**Statement of Information
(Foreign Corporation)**

FEES (Filing and Disclosure): \$25.00.

If this is an amendment, see instructions.

IMPORTANT – READ INSTRUCTIONS BEFORE COMPLETING THIS FORM

F

G920963

FILED

In the office of the Secretary of State
of the State of California

SEP-09 2019

1. CORPORATE NAME

RAFTELIS FINANCIAL CONSULTANTS, INC.

2. CALIFORNIA CORPORATE NUMBER

C2670972

This Space for Filing Use Only

No Change Statement (Not applicable if agent address of record is a P.O. Box address. See instructions.)

3. **If there have been any changes to the information contained in the last Statement of Information filed with the California Secretary of State, or no statement of information has been previously filed, this form must be completed in its entirety.**

If there has been no change in any of the information contained in the last Statement of Information filed with the California Secretary of State, check the box and proceed to **Item 13**.

Complete Addresses for the Following (Do not abbreviate the name of the city. Items 4 and 5 cannot be P.O. Boxes.)

4. STREET ADDRESS OF PRINCIPAL EXECUTIVE OFFICE	CITY	STATE	ZIP CODE
227 WEST TRADE STREET SUITE 1400, CHARLOTTE, NC 28202			
5. STREET ADDRESS OF PRINCIPAL BUSINESS OFFICE IN CALIFORNIA, IF ANY	CITY	STATE	ZIP CODE
445 S. FIGUEROA STREET SUITE 1925, LOS ANGELES, CA 90071			
6. MAILING ADDRESS OF THE CORPORATION, IF DIFFERENT THAN ITEM 4	CITY	STATE	ZIP CODE

Names and Complete Addresses of the Following Officers (The corporation must list these three officers. A comparable title for the specific officer may be added; however, the preprinted titles on this form must not be altered.)

7. CHIEF EXECUTIVE OFFICER/	ADDRESS	CITY	STATE	ZIP CODE
PEIFFER A BRANDT	227 WEST TRADE ST., STE 1400, CHARLOTTE, NC 28202			
8. SECRETARY	ADDRESS	CITY	STATE	ZIP CODE
MATTHEW R JACKSON	227 WEST TRADE ST., STE 1400, CHARLOTTE, NC 28202			
9. CHIEF FINANCIAL OFFICER/	ADDRESS	CITY	STATE	ZIP CODE
MATTHEW R JACKSON	227 WEST TRADE ST., STE 1400, CHARLOTTE, NC 28202			

Agent for Service of Process If the agent is an individual, the agent must reside in California and Item 11 must be completed with a California street address, a P.O. Box address is not acceptable. If the agent is another corporation, the agent must have on file with the California Secretary of State a certificate pursuant to California Corporations Code section 1505 and Item 11 must be left blank.

10. **NAME OF AGENT FOR SERVICE OF PROCESS** [Note: The person designated as the corporation's agent MUST have agreed to act in that capacity prior to the designation.]

STEVE GAGNON

11. **STREET ADDRESS OF AGENT FOR SERVICE OF PROCESS IN CALIFORNIA, IF AN INDIVIDUAL** CITY STATE ZIP CODE

17171 BOLSA CHICA ST., APT. 89, HUNTINGTON BEACH, CA 92649

Type of Business

12. DESCRIBE THE TYPE OF BUSINESS OF THE CORPORATION

WATER/STORMWATER CONSULTANTS

13. THE INFORMATION CONTAINED HEREIN IS TRUE AND CORRECT.

09/09/2019

MATTHEW R JACKSON

CORPORATE SECRETARY

DATE

TYPE/PRINT NAME OF PERSON COMPLETING FORM

TITLE

SIGNATURE

WHO IS

Raftelis

HELPING LOCAL GOVERNMENTS THRIVE

Local governments partner with Raftelis to transform their organizations by enhancing performance, planning for the future, identifying top talent, improving their financial condition, and telling their story. We've helped more than 600 organizations in the last year alone. We provide trusted advice, and our experts include former municipal leaders with decades of hands-on experience running successful organizations. People who lead local governments are innovators constantly seeking ways to provide better service to the communities that rely on them. Raftelis provides management consulting expertise, communication assessments, and insights that help bring about the change our clients seek.

+ VISIT [RAFTELIS.COM](https://www.raftelis.com) TO LEARN MORE



We believe that Raftelis is the *right fit* for this project. We provide several key factors that will benefit the City of Carson and help make your communications and marketing a success.



DIRECT EXPERIENCE - We've walked in your shoes. Most of our team members have led the public affairs program for local governments. We're familiar with a city's unique constraints and concerns. We've built and executed countless outreach programs and employed all aspects of strategic public relations to help cities, counties, special districts, and utilities reach their internal and external customers effectively.



MEASURABLE RESULTS - Success will be measured by outcomes, not just outputs. Many times, we see clients evaluating success by how many materials they distribute, how many hits they get to their website, or how many likes they get on Facebook. These are useful stats as leading indicators, but they alone are not a measure of success. You need real outcomes, and we can set up a plan to measure them.



RESOURCES & EXPERTISE - This project needs specialized expertise, and we bring it. All our communications staff are accredited in public relations by the Public Relations Society of America. This credential is a mark of distinction and very difficult to obtain. It assures you that we follow industry standard best practices, we commit to lifelong learning, and we adhere to a Code of Ethics. Our team regularly engages in professional development and also invests our time mentoring and coaching other professionals. In addition, members of our team are trained in public participation by the International Association of Public Participation (IAP2). We are each sought-after speakers within the public affairs and public relations fields, having spoken at various conferences and having been published in consumer and trade publications.



INDUSTRY BEST PRACTICES - We know what works for some, may not work for all. With so many marketing tools available today, it can be tempting to use as many as possible. However, not all of them are right for everyone. The best way to reach your audience is determined by your audience. This means what may work for one agency or organization may not work for you. Our team will apply best practices, as defined by the Public Relations Society of America and the Social Marketing Association of North America, to ensure the plan we implement is efficient, targeted, and effective.

Inform and engage with your stakeholders to build understanding and support

There has never been a more critical time for local governments to communicate the value of the services they provide.

Well-crafted strategic communications can build trust, reputation, influence, and brand equity. We specialize in strategic communication counsel, public engagement, and community involvement, and can provide the guidance, structure, strategies, and tactics to help make your program, infrastructure project, or revenue request successful and avoid costly delays and reputational crises.



Our Strategic Communications Services

- + Strategic communication planning
- + Public involvement and community outreach
- + Public meeting facilitation
- + Graphic design and marketing materials
- + Media and spokesperson training
- + Risk and crisis communication
- + Social media strategy
- + Technical writing and content development
- + Visual facilitation
- + Virtual engagement

Recent Communications Clients

- + Boulder, City of
- + Corpus Christi, City of
- + Newport Beach, City of
- + Oklahoma City, City of
- + Pinellas County
- + Port Hueneme, City of
- + Reno, City of
- + Richmond, City of
- + Santa Cruz, City of
- + St. Helena, City of
- + Tucson, City of
- + Carpinteria Water District
- + Metropolitan Water District
- + Municipal Water District of Orange County
- + Montecito Water District

“Brand is the sum total of how someone perceives a particular organization. Branding is about shaping that perception.”

--Ashley Friedlein

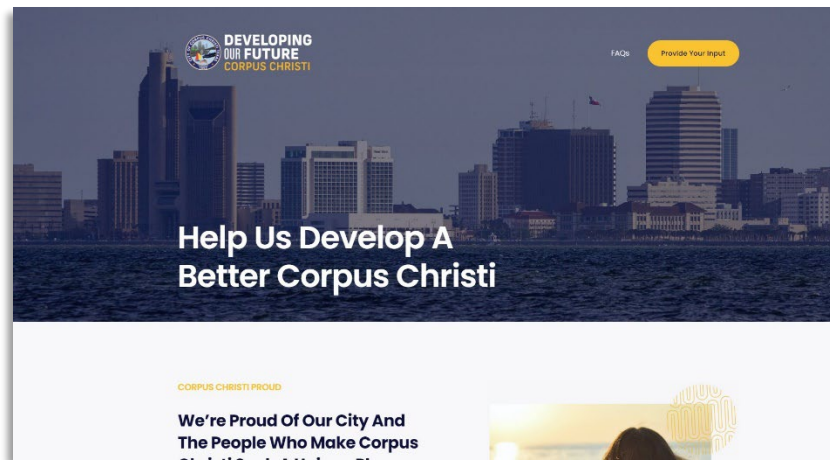
Experience

RAFTELIS' STRATEGIC COMMUNICATIONS TEAM HAS MORE THAN 100 YEARS OF COMBINED EXPERIENCE IN PUBLIC SECTOR STRATEGIC COMMUNICATIONS AND SPECIALIZED EXPERIENCE IN CONSUMER MARKETING AND BRANDING.

Our communications staff has assisted dozens of public agencies and utilities across the U.S., including some of the largest and most complex agencies in the nation. In the past year alone, Raftelis' communications team worked on strategic communications projects for more than 40 agencies across the United States and in Canada. Below, we have provided descriptions of projects we have worked on that are similar in scope to the City's strategic communications and marketing implementation plan. We urge you to contact our references provided in the Client Reference List section to better understand our capabilities and the quality of service that we provide.

City of Corpus Christi TX

Corpus Christi currently uses a Trust Fund for funding the extension of infrastructure to new developments. Raftelis developed a year-long campaign, Developing Our Future: Corpus Christi, to help the City raise awareness and support for creating master plans and adopting impact fees to enable more intentional planned development, funded in a more appropriate way. Sam is leading the team to assist the City with the campaign. Strategies include paid and earned media, social media, and affiliate marketing through allied community groups. Marketing tactics include logo development, messaging, bilingual materials, a project website, presentation deck, media training, and development of a Capital Improvement Advisory Committee.



County of Santa Barbara CA

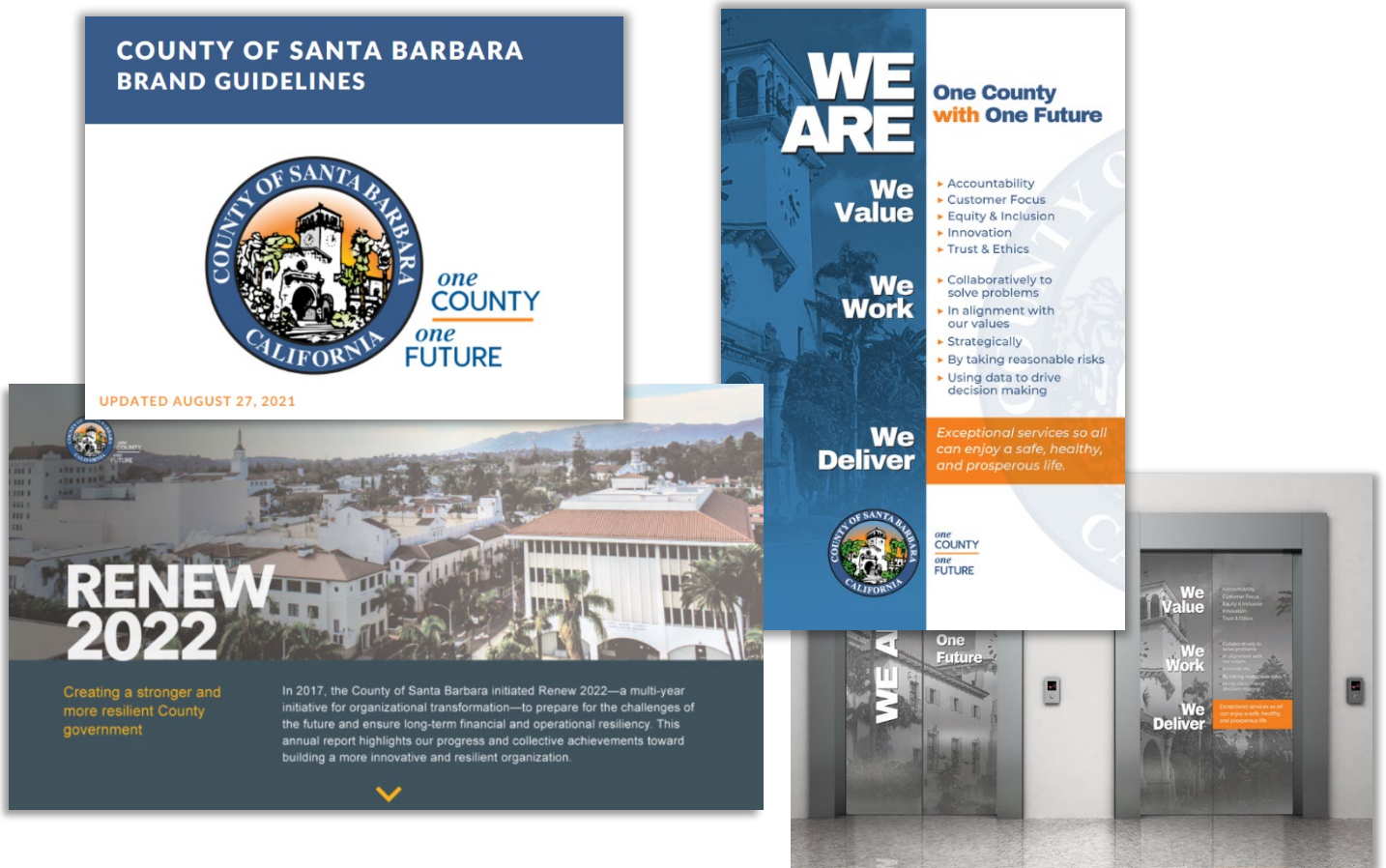
NOTE: The County is not a Raftelis client; this is an example of work led by Gina in her previous role for the County.

The County of Santa Barbara embarked on a five-year initiative to transform how County government does its work. The Renew 2022 initiative originated with an internal strategic organizational plan, followed by the Budget Rebalance effort, which was intended to address significant increases to pension costs. Recognizing that the pressures and challenges the County faced were unlikely to abate in the near term, Renew '22 sought to build the County's capacity for innovation and continuous improvement through organizational transformation. The importance of this need was fortified after significant natural disasters and the COVID-19 pandemic greatly impacted the county.

Quarterly and annual reporting to the Board, employees and the public provides an overview of the County's continuing progress toward achieving "big picture goals" and other Renew '22 initiatives. The transformation is not limited to a re-evaluation and re-tooling of how and what the County does; it seeks to empower change, improve operations, develop sustainable revenue strategies, prepare the next generation of leaders, and refocus on customer service including multicultural and equitable public outreach – all in alignment with the priorities set by the community and the Board of Supervisors.

In her role at the County, Gina was a member of the executive decision-making team and developed a comprehensive Communications and Engagement Plan, along with a "mission-vision-values" campaign to communicate the County's commitment to Renew '22 and its core values and behaviors that were defined and honed through the strategic planning process, employee surveys, and department leadership workshops.

Deliverables included a messaging platform, fact sheets, video presentations, employee and public presentations, employee feedback surveys, logo development and branding guide, and four sessions of a one-day custom leadership development seminar designed by Gina that was offered to 300 middle managers. Wayfinding signage is underway.




Montecito Water District CA

Montecito Water District’s current water sources cannot meet the future water needs of the community it serves. The district gets its water from three main sources—local surface water, groundwater, and supplemental water purchases.

The impacts of climate change are evident in the region the district serves. Droughts are increasing in intensity and impacting all their main water sources. In the most recent drought, surface supplies dwindled, groundwater was relied on heavily, and high-risk supplemental water had to be purchased to cover our community’s needs. Customers were still paying surcharges related to emergency water purchases, and the district’s groundwater basin is still in recovery. The district currently relies heavily on State Water Project infrastructure for allocation deliveries and supplemental water purchases. The solution was a long-term water supply agreement with the City of Santa Barbara to receive water from that city’s recommissioned desalination plant.

As our colleagues in Raftelis’ financial consulting group drew closer to completing a comprehensive rate study to fund the District’s move to a new water supply, we were engaged to support stakeholder engagement, strategic communications, and efforts to comply with California’s Proposition 218 requirements.

We developed a comprehensive Strategic Communications and Stakeholder Engagement Plan to guide the District through what would potentially become a contentious public process. Our strategies, tactics, and messaging worked together to build awareness for the need for higher rates to fund critical water supply and infrastructure investment. In the end, the rate change recommendation that supported the move to a new water supply portfolio earned favorable media coverage, the unanimous support of the Board, and no effective opposition.



MONTECITO WATER DISTRICT HAS PLANS FOR DELIVERING A SECURE WATER FUTURE

We've heard from our customers, who want their drink water to come from local, reliable supplies with stable, predictable, and affordable rates.

THE CHALLENGES

- Our current water sources are projected to be insufficient to meet our community's future needs.
- In the most recent drought surface supplies dwindled, groundwater was relied on and became severely depleted. High-risk supplemental water had to be purchased to cover our community's needs, even though customers cut their water use. Future drought forecast to last longer and be more severe. Climate change is one factor.
- State Water Project deliveries are increasingly unreliable due to climate change, and depend on distant and costly infrastructure.
- Environmental and regulatory restrictions are expanding, which further limits supply from the State Water Project and Lake Cachuma.
- Water storage is an ongoing concern. Capacity in Jameson Lake and Lake Cachuma has been permanently reduced as a result of silt and fires, which also impacts water quality.
- Many parts of Montecito and Summerland rely on water infrastructure that is almost 50 years old and becomes less reliable each day.

OUR SOLUTION INCLUDES

- A comprehensive plan to provide for water needs moving forward.
- Negotiating a long-term Water Supply Agreement (WSA) with the City of Santa Barbara. The City's desalination plant provides the foundation for the WSA, which will cement a regional partnership in water management and provide our customers with a local, drought resilient supply at a guaranteed cost for the next 50 years.
- Continuing to modernize our water system to better ensure reliability, with planned investments of more than \$11.7 million over the next five years.

While we do everything we can to maximize efficiencies to keep costs low...

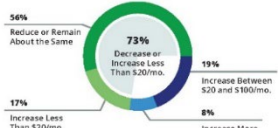
- Costs are increasing about 2% annually due to inflation as tracked by the consumer price index in our region.
- Costs for imported water and capital needs are increasing as much as 6%.

MONTECITO WATER DISTRICT IS CONSIDERING CHANGES TO HOW IT CHARGES FOR WATER SERVICE

The rate study determined that the District requires 2.8% more revenue each year for five years, beginning July 1, 2020 to fund operating and capital costs, maintain adequate reserve balances, and meet existing debt service obligations. The results of the rate study allowed us to develop a proposed rate structure that:

- Keeps things simple and transparent, making it easy for our customers to monitor their water use to encourage water efficiency
- Adjusts tiered volumetric rates to more accurately reflect how customers use water today, and to reinforce our commitment to conservation
- Funds critical water supply investments and infrastructure improvements to ensure water supply availability long term and prevent/reduce service disruptions and associated water loss
- Adjusts rates to be aligned with total District consumption and include drought related expenses to avoid the need for a surcharge
- Solidifies MWD's long-term financial plan and builds responsible reserve funds that will help maintain gradual, predictable future rate increases

MONTHLY CUSTOMER BILL IMPACTS 2020



PROPOSED TIERED VOLUMETRIC RATES	TYPICAL RESIDENTIAL CUSTOMERS	BILL IMPACT IF NEW RATES ARE ADOPTED
TIER 1: UP TO 9 HCF / \$6.56/HCF <i>CA indoor water efficiency standard for family of four</i>	CUSTOMER 1 12 hundred cubic feet/mo.	Monthly Bill Decreases by \$11.47
TIER 2: 10-35 HCF / \$11.14/HCF <i>Average summer water demand beyond indoor needs</i>	CUSTOMER 2 23 hundred cubic feet/mo.	Monthly Bill Decreases by \$13.72
TIER 3: >35 HCF / \$12.31/HCF <i>Water use beyond efficient indoor and average summer outdoor</i>	CUSTOMER 3 36 hundred cubic feet/mo.	Monthly Bill Increases by \$37.11

Note: 1 hundred cubic feet (hcf) = 748 gallons

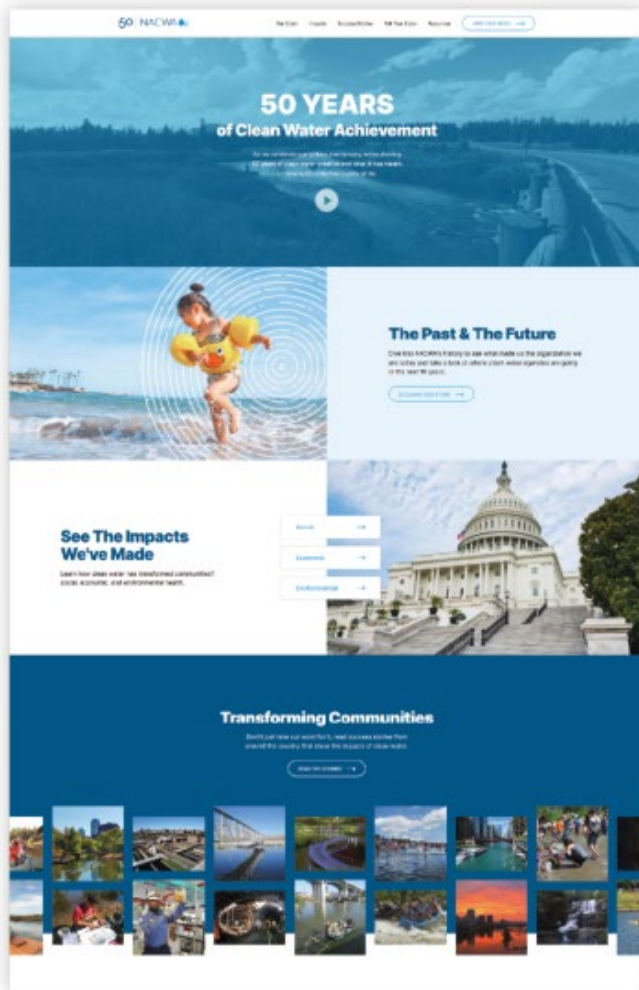
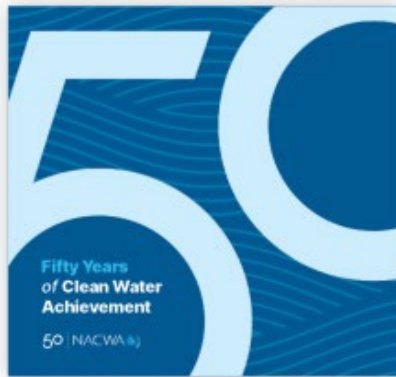
LEARN MORE!
For more information, to discuss future plans or share how we can better serve you, please contact us:

www.montecitowater.com | 805-969-2271 | customerservice@montecitowater.com

ADDITIONAL INFORMATION: Portfolio

Here, we have included more samples of recent work that we have performed for local government agencies across the country. For brevity, we included screenshots of these deliverables; however, you can view our more comprehensive digital portfolio here:

bit.ly/3Jxe5zO.



Willard Sherwood Health and Community Center
Feedback Summary



The City of Fairfax and Fairfax County have joined together on a unique project to redevelop the Willard Health Center site.

A new facility will be built in its place, offering the same services provided there today, plus child care. It will include recreation, child care, the Green Acres Center. The project is an opp with the Sherwood Center. It will enable more smoother traffic flow in, out, and through the Gold certification, which means lower energy systems and equipment. This full campus red destination for health services, wellness, fitness



Gathering Input

An opportunity like this to rebuild an important community amenity is quite rare, and we wanted to make sure residents of the area and potential users of the new facilities had opportunities to provide their input into the new design. This document shares major themes of what we heard.

- Jan 76
- Jan 55
- Feb 21
- On Jan 1,4
- Nin
- C
- Parks and Rec Advisory Board
- Fairfax Police Youth Club
- Mt. Calvary Baptist Church
- Senior Center
- Nearby Churches and Schools
- Board of Architectural Review
- Neighborhood Associations
- Environmental Sustainability Committee

Provide Your Input for a New Health and Wellness Facility Coming to Fairfax

An exciting project is underway in Fairfax that will benefit both city and county residents. A new community and health and human service facility will be built in place of the Willard Health Center. It will offer the same services that are provided there today, plus child care, and include relocated programs from the Green Acres Center. A full campus redesign will connect this facility with the Sherwood Center and both city and county residents will have one destination for health services, wellness, fitness, child care, recreation and the arts in Fairfax City.

Scan QR code for more details



How We Promoted

We reached City and County residents over a 6-week period a variety of ways:

- 13 Facebook posts reached 4042 people
- 11 Twitter posts reached > 1000 people
- 10 Videos with >1,500 views
- 14 Mass emails sent to >40,000 people
- Bus ads and fliers distributed



- Emails, fliers, and invitations to schedule presentations sent to:
- FACETS Non Profit
 - Britepaths Non Profit
 - Salvation Army
 - The Arc of Northern Virginia
 - Mount Calvary Baptist Church
 - The House of Wood Non-Profit

The Fairfax County Health Department also did the following:

- Shared fliers with clients
- Made posts to social media
- Promoted on digital displays at offices



Materials were translated into Spanish and fliers mentioned the project and offered translation and interpretation of information in six languages.

OPA Newsletter article



JAN 14 promotional video
328 impressions

JAN 19 Email blast to:
 Members of City Boards and Commissions and City Civic Associations
 Direct email to: **2,300** Senior Center Members



Fliers posted at Sherwood, Green Acres, & City Hall Parks, plus...

Meeting fliers posted at various locations around Fairfax City:

- Indian Bazaar grocery
- Americana grocery
- Kokee Tea
- Duck Donuts
- Pot-belly restaurant
- Panera restaurant
- Starbucks
- Ace Hardware
- West Wood Oaks Apartments
- Layton Hall Apartments
- City of Fairfax Regional Library



Both the County and the City posted websites dedicated to the project.

Meetings calendar & Spotlight
 (Carousel on City of Fairfax home page)



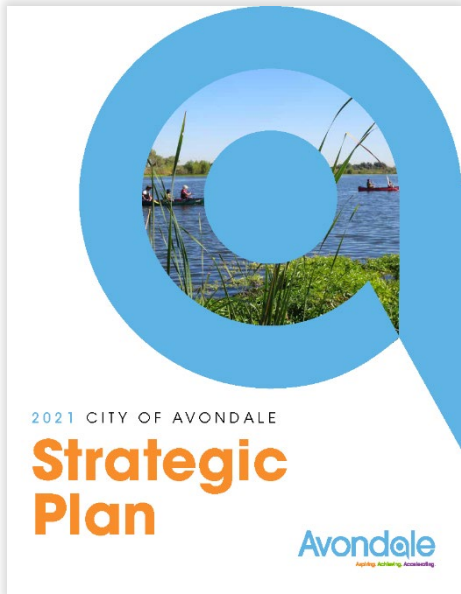
Join Us

Now that we've received your initial thoughts, please join us soon to review and provide input on some preliminary design alternatives. The next opportunities to provide input will be posted at: fairfaxcounty.gov/publicworks/capital-projects/willard-sherwood-health-community-center.

For More Information

To learn more about the project, visit:
fairfaxcounty.gov/publicworks/capital-projects/willard-sherwood-health-community-center
engage.fairfaxva.gov/willard-sherwood-health-and-community-center

If your questions aren't answered at either website, email the project team at willard-sherwoodproject@fairfaxcounty.gov



Strategic Planning Process

Avondale's strategic planning process was designed to assure:

- A shared vision of the city's ultimate goals. Organizations often by their position and interest release a greater capacity to succeed than those that do not.
- A collective understanding of the available resources, the environment, and the opportunities upon which strategies will be based.
- Acceptance of the direction and urgency of the strategic plan which will be integrated into the way the city is operated on a day-to-day basis.

To achieve these conditions for success, Avondale's strategic planning process involved input from a broad group of internal and external stakeholders. Key elements of the process included:

- Review of the progress made against the city's 2016 Strategic Plan
- Immersion and a work session with Avondale's Mayor and City Council
- Immersion and a work session with the City Manager, Deputy City Manager, Assistant City Manager, and Department leadership
- A virtual community summit with 25 participants

This input was used to update the outcome areas in the Strategic Plan, which were then reviewed and refined by the City Manager's Office.

City of Avondale Community Summit

WE RELY ON AVONDALE

- SAFE ON AVONDALE
- MAZE BOOKS LIBRARY
- SAFE FOODS
- PLAN FOR HOMELESS
- GROWTH PLAN
- FILED POLICE PROTECTION
- CRITICAL INFRASTRUCTURE
- WATER
- TRANSIT
- RECREATION AND ACTIVITIES
- SMALL TOWN FEEL
- NOVAK
- RAFTELIS

TRUE TODAY...

- SAFE
- GREAT COMMUNITY
- AVONDALE
- WATER
- OPEN SPACE
- RECREATION AND ACTIVITIES
- MASCAR
- SMALL TOWN FEEL
- NOVAK
- RAFTELIS

TRUE IN 10 YEARS

- MASS TRANSIT
- PLANS TO SOLVE HOMELESSNESS
- WATER
- CRITICAL INFRASTRUCTURE
- RECREATION AND ACTIVITIES
- SMALL TOWN FEEL
- NOVAK
- RAFTELIS

THE STRATEGIC INITIATIVES

- WATER
- TRANSIT
- RECREATION AND ACTIVITIES
- SMALL TOWN FEEL
- NOVAK
- RAFTELIS

August 21, 2020



Jeffco by the Numbers

According to the US Census

- 582,881** Population estimate July 1, 2019
- 4TH** Most populated of 66 counties in the state
- 245,121** Housing units 2019 estimate

Parks and Open Space

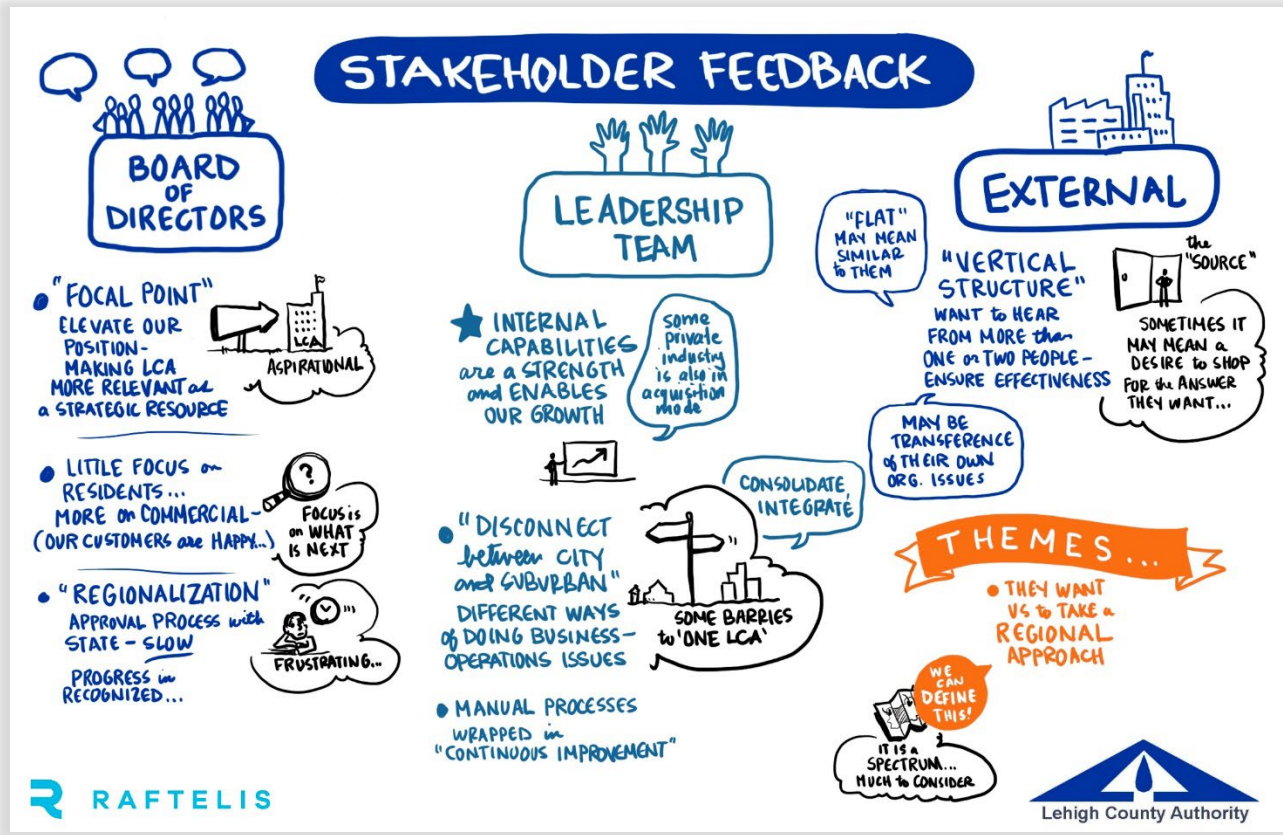
- 56,000** Acres preserved
- 252** Trail miles
- 27** Parks

Road and Bridge maintains more than

- 2,900** Paved lane miles
- 700** Gravel roadway lead miles

Land Area

- 774** Square miles
- 557** Square miles of mountain area
- 217** Square miles of plains area



Raftelis facilitated a series of community meetings in Corpus Christi, Texas in support of creating a new stormwater utility.



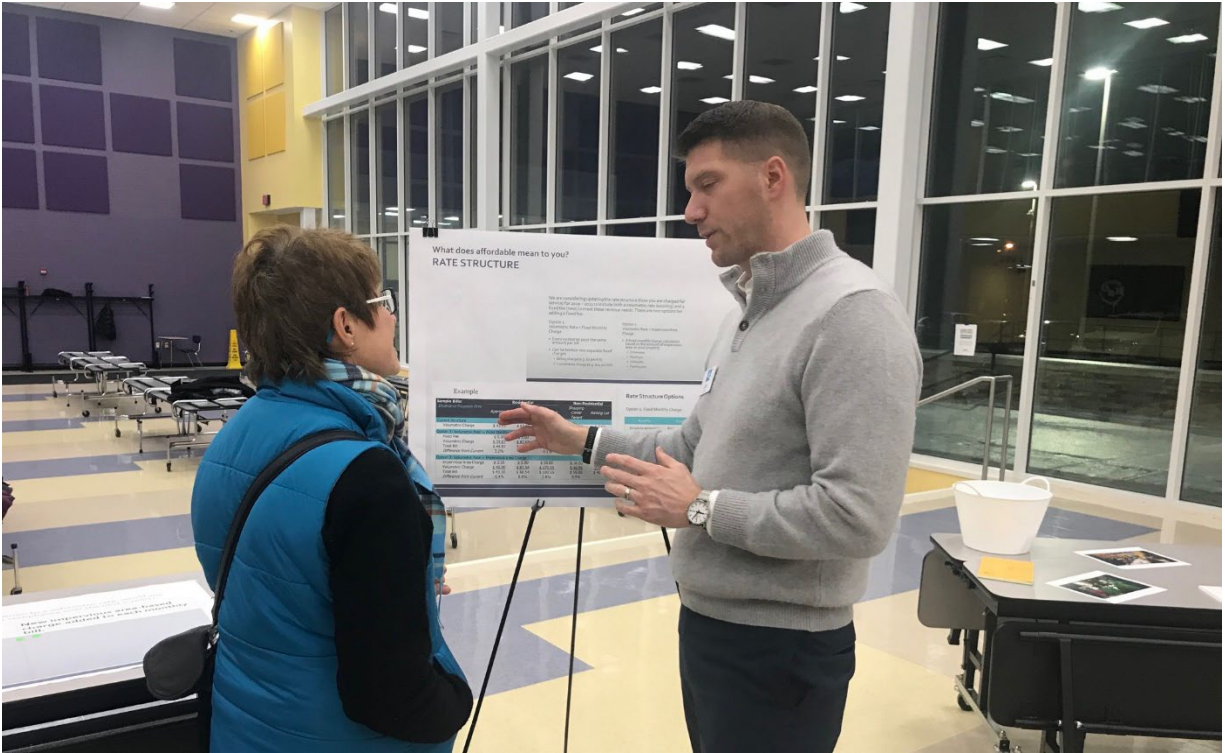
Raftelis facilitated a series of open houses for Sweetwater Authority rate increase.



Raftelis facilitated a public engagement session in Lakewood, Ohio.

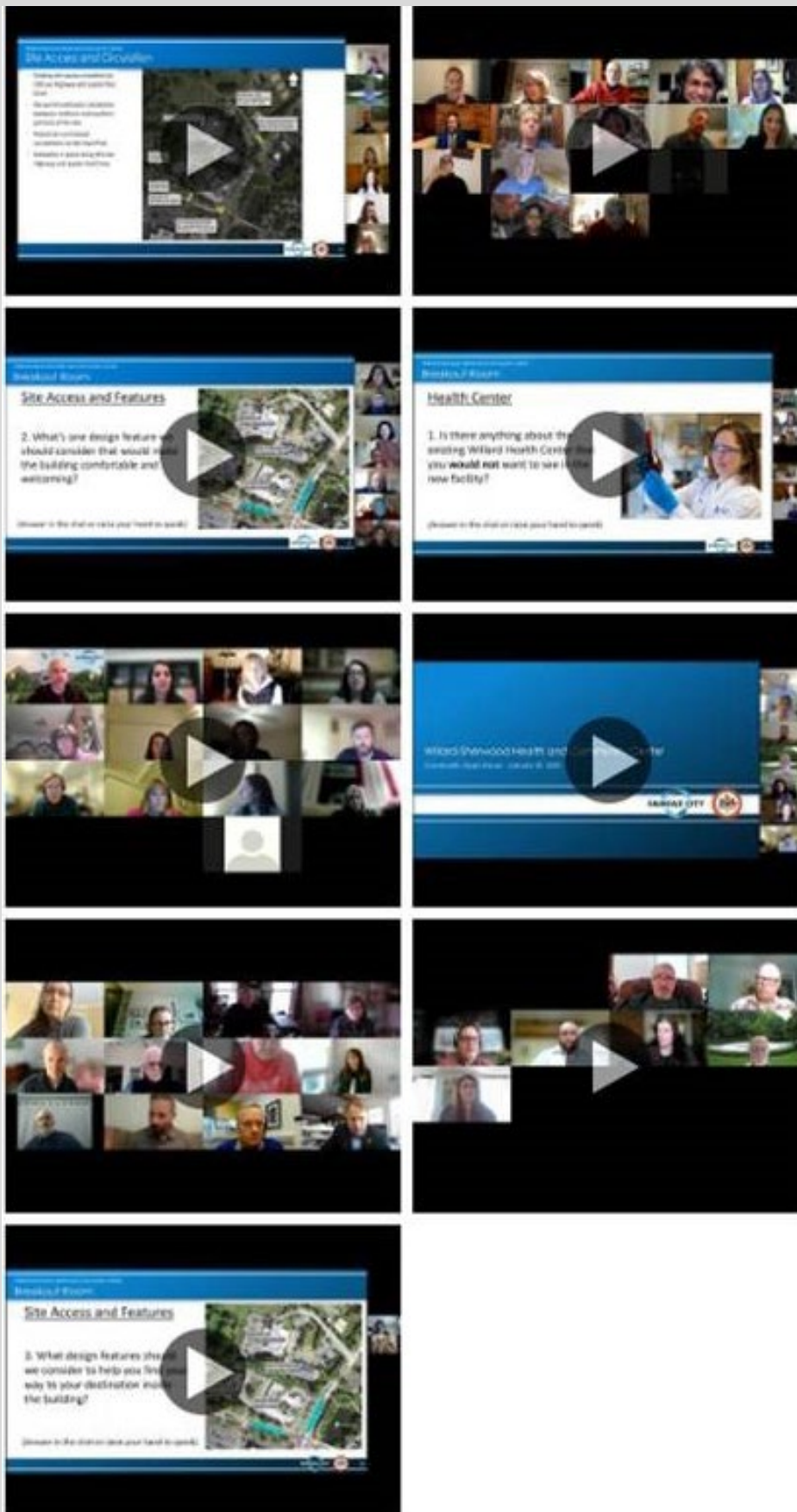


Raftelis coordinated a series of open houses in Lakewood, Ohio to help the City obtain resident input into a new water rate structure.



Lakewood, Ohio residents stopping at different stations to learn about a new water rate structure.





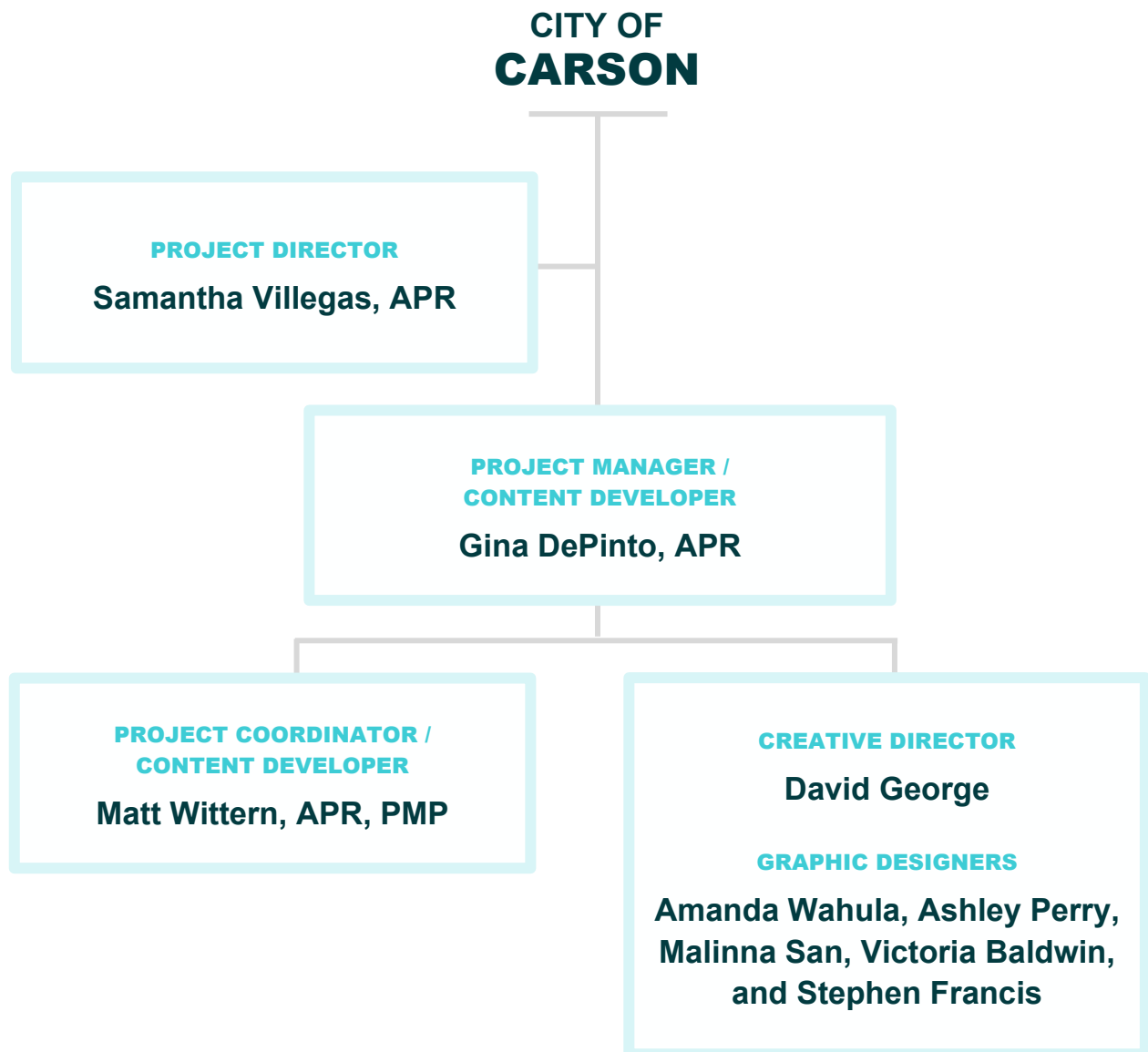
Raftelis hosted and facilitated a series of virtual open houses for a joint city and county redevelopment project in Fairfax, Virginia

Project Team

WE HAVE DEVELOPED A TEAM OF CONSULTANTS WHO SPECIALIZE IN THE SPECIFIC ELEMENTS THAT WILL BE CRITICAL TO THE SUCCESS OF THE CITY'S STRATEGIC COMMUNICATIONS.

Our team includes senior-level professionals to provide experienced project leadership with support from our talented in-house creative services and graphic design staff. This close-knit group has frequently collaborated on similar successful projects, providing the City with confidence in our capabilities.

Here, we have included an organizational chart showing the structure of our project team. On the following pages, we have included resumes for each of our team members as well as a description of their role on the project.



Sam Villegas APR

PROJECT DIRECTOR

Director of Strategic Communication Services



ROLE

Sam will be responsible for overall project accountability and will be available to provide quality assurance and control, industry perspective, and insights into the project.

PROFILE

Sam is an award-winning communications and outreach strategist, with nearly 30 years of experience conducting communication and public outreach for public agencies. Sam began her career helping municipalities and corporations increase their recycling rates. From there she worked on a national campaign to promote energy efficiency investments to small businesses. Sam then turned her focus to water and wastewater, helping utilities and public works agencies build support for rate increases and infrastructure investments. Sam has worked within public relations agencies, governments and nonprofits, and was owner and president of SaVi PR, a virtual agency based outside of Washington, DC. Sam led communications at two utilities (public and investor-owned), where she executed successful education and outreach campaigns that raised awareness of issues and programs, changed behaviors and attitudes, and built trust in the organization. Now Sam leads Raftelis' Strategic Communications practice. Sam is actively involved in the public relations sector, frequently speaking at conferences and authoring articles for trade publications. Sam was chapter president of the largest public relations chapter of the Public Relations Society of America in 2013 (the National Capitol Chapter). From there she served on the national board for PRSA for two consecutive terms. Sam has a Master of Science in environmental policy from Johns Hopkins University, she is accredited in public relations from PRSA and she holds certificates in public participation from the International Association of Public Participation.

KEY PROJECT EXPERIENCE

Planning and Development Outreach and Communications (City of Corpus Christi, TX)

Corpus Christi currently uses a Trust Fund for funding the extension of infrastructure to new developments. Sam developed a year-long campaign, Build A Better Corpus Christi, to help the City raise awareness and support for adopting Impact Fees, which will enable more intentional, planned development, funded in a more appropriate way. Sam is leading the team to assist the City with the campaign. Deliverables include logo development, messaging, materials, a project website, presentation deck, media training, and development of a Capital Improvement Advisory Committee.

Regional Communications Campaign (Metropolitan Washington Council of Governments)

More than 15 different water and wastewater agencies serve the residents and businesses of the metropolitan Washington, DC region. Sam has been working with the group to elevate their communications and coordination efforts. For this

Specialties

- Stakeholder engagement
- Strategic communications planning
- Crisis & risk communications
- Community-based social marketing
- Program assessment & measurement
- Development & oversight of paid (advertising), earned (stories placed), shared (social) & owned media
- Writing & copyediting
- Public speaking

Professional History

- Raftelis: Director of Strategic Communication Services
- SaVi PR, LLC: Owner
- American Water: Vice President
- Loudoun Water: Manager of Communications
- CEC: Public Affairs Specialist
- Lisboa: Senior Account Manager
- Mitchell Petersen: Account Executive

Education

- Accredited in Public Relations - PRSA
- MS, Environmental Policy - Johns Hopkins University
- BS, Biology - PSU

Professional Memberships

- American Water Works Association Public Affairs Council
- International Association of Public Participation
- NACWA
- Public Relations Society of America
- Social Marketing Association of North America
- Water Environment Federation

project Sam oversaw deployment of the first regional digital survey on water and wastewater awareness and behaviors, as well as a series of in-depth interviews with utility leaders. Using this data, she developed a strategic communications plan, coordinated messaging on key focus areas, and a seasonal content calendar to ensure consistency among - and credibility for - the region's water and wastewater sector. Sam's work extends to the Anacostia Watershed Messaging Partnership with a comprehensive 3-year strategic outreach and messaging plan in support of raising awareness of and changing behaviors to protect the Anacostia River and its watershed.

50th Anniversary Communications (NACWA)

Raftelis was hired by the National Association of Clean Water Agencies (NACWA) to develop, as part of their 50th anniversary, an inspirational and aspirational story about how clean water has transformed communities over the last 50 years. Deliverables include a printed book and website, plus more than 20 case studies nationwide from NACWA members. Sam worked with the members to develop 22 case studies, she conducted research for the book and website, she is the book's primary author and Sam aided in the management of the deliverables.

Community Redevelopment Communications and Engagement (Fairfax County/City, VA)

Sam developed a strategic communications and engagement plan for the joint redevelopment of the Sherwood-Willard health and community center. Sam guided a large, multi-disciplinary team of city and county employees through a discovery and planning process to assure key stakeholders are informed of the project and opportunities to provide input into the design. Sam is also guiding and providing support to engagement techniques and guiding the production and dissemination of information about the project.

Energy Efficiency Communications for the U.S. Department of Energy

Sam was hired to support DOE's Office of Energy Efficiency and Renewable Energy (EERE). In this role, Sam ghost wrote blog posts on energy efficiency in manufacturing, she copyedited progress alerts, stakeholder emails, news releases, blog posts and web updates; she wrote talking points and prepared staff for media interviews; she oversaw all emailed requests from the media for information and interviews; she rewrote the content for the Technology to Market website and created a new navigational structure and content; she supported the development of a key message platform for Technology to Market group; and trained managers in public speaking and developing their elevator pitches.

National Education Campaign for the U.S. Environmental Protection Agency

Sam led a team that designed and launched a national education campaign to promote the benefits of energy efficiency, with a focus on the nation's 23 million small businesses. Sam wrote case studies, helped build the program's award-winning website, created public service advertising using celebrities Greg Germann and Peter MacNichol, and brokered partnerships with large trade organizations to help build support for the program.

Bilingual Payment Assistance Campaign (Charlotte Water, NC)

Sam and other team members worked with Charlotte Water over the course of nine months to raise awareness among customers of the myriad opportunities to get payment assistance. Following the pandemic, the number of past due accounts had soared and Charlotte Water sought help to make those customers whole, before they began shutoffs again. But Charlotte Water didn't know which customers, demographically, were past due or why. The Raftelis team conducted market research (surveys, focus groups, interviews) to determine exactly who needed help, so that the most direct and effective strategies could be used to reach them. Raftelis worked with nonprofits to reach key stakeholders, and promoted through transit ads, social media, radio interviews (Spanish and English), special events, Spotify ads, and printed and sent posters to a number of local merchants in key neighborhoods.

Communications Assessment and Strategic Planning (Howard County, MD)

Sam conducted a comprehensive analysis of the division of recycling's communications and outreach program. The assessment included conducting a Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis with the internal team; a countywide digital survey, three focus groups, and benchmarks with three similar communities. The Howard County Recycling Division's current communications plan and all its educational materials and outreach efforts were reviewed and assessed for effectiveness in meeting the Division's goals and all was captured in a detailed report, with specific recommendations for improvement.

Reimagining and Designing the Consumer Confidence Report for Success (Environmental Policy and Innovation Center)

Sam led a multi-disciplinary team of writers, graphic designers, and data visualists to develop an award-winning entry into the Environmental Policy and Innovation Center's contest to reimagine the Consumer Confidence Report. Sam's team created an online and print template for the CCR that improved its accessibility to all audiences, using the CDC Clear Communication Index, the Flesch-Kincaid reading scale, and best-in-class design. Raftelis was selected through a competitive process to also design a national template for the CCR. That project is underway now.

PUBLICATIONS

- "Time to Torch the Townhall Meeting," Think Tank, Raftelis, September 2021
- "Public Outreach Part II: More Cost Savings Than Cost Center," Waste Advantage, 2015
- "Public Outreach Part I: More Science Than Art," Waste Advantage, 2015
- "Eleven Myths About Social Media Every Water Utility Manager Should Know," AWWA Journal, 2013
- "Take the PR Pledge, Ragan Communications," The PR Daily, 2013
- "What Howard Stern Can Teach Us About PR," The PR Daily, 2012
- "Re-examining A Utility's Brand Image," AWWA Journal, 2007
- "A Brand-New Day - Things That Shocked Me While Rebranding," PRSA Tactics, 2007
- "Hydrant Use: Balancing Access and Protection," AWWA Opflow, 2006
- "Changing Behavior with Social Marketing Techniques," PRSA On the Environment Horizon, 2000

PRESENTATIONS

- "Trending in an Instant," ACE Virtual Summit, AWWA, online, September 2020
- "It's Scary Out There – How to Use Social Science in Communication to Decrease Fear and Build Trust," CAPIO Webinar, March 2020
- "Be a Trusted Source: How to Handle Communication During COVID-19," AWWA Webinar, March 2020
- "Trending in an Instant," Utility Management Conference, WEF, Anaheim, February 2020
- "Get Your (Communications) Assessment in Gear," Catalyst Conference, June 2019
- "So, Your Market's Been Disrupted, Now What?" Keynote, Virginia Recycling Association Conference, May 2019
- "Communications Guidance for Legionella in Building Water Systems," San Francisco Public Utilities Commission Workshop, November 2018
- "Communications on the Other Side of the Meter," AWWA ACE, Philadelphia, 2017
- "Media Myths and Magic," AWWA ACE, 2016
- "Public Outreach, It's More Science Than Art," WasteCon, 2015
- "Communicating About Lead Service Lines," AWWA ACE, 2014
- "Eleven Myths About Social Media," North Texas Water Symposium, 2013
- "The Power of Proactive Communications," VAAWWA/VAWEA JAM, 2013
- "Building a Sustainable Brand: How to Identify, Attract and Engage Stakeholders in Your Mission," Smart and Assessment of Communications and Outreach Program Sustainable Pre-Conference Workshop, 2013
- "The Importance of PR To A Water Utility," WLI Conference, 2012
- "Advocacy Communications," PLANET Annual Conference, 2011
- "Managing Demand for the Blue in a Green is Godly World," NAGC Conference, 2009
- "Web 2.0 Technology," VA AWWA/VWEA JAM, 2009
- "Communicating Your Value Through Branding," VAAWWA/VWEA JAM, 2007

Gina DePinto APR

PROJECT MANAGER/CONTENT DEVELOPER

Manager

ROLE

Gina will manage the day-to-day aspects of the project ensuring it is within budget, on schedule, and effectively meets the City's objectives. She will also lead the team in conducting analyses and preparing deliverables for the project. Gina will serve as the City's main point of contact for the project.

PROFILE

Gina is an award-winning and accredited public relations professional with more than 34 years of experience and leadership in crisis communications, community outreach, advocacy, stakeholder engagement, marketing, and media relations in the public and private sectors. Gina's leadership experience includes communications program management for \$2 billion in public transportation and water infrastructure projects, including the Port of Long Beach Gerald Desmond Bridge Replacement Project and the Orange County Groundwater Replenishment System. The GWRS has been covered by international media including National Geographic, Wall Street Journal, New York Times, BBC, CNN, and NPR to name a few. Prior to joining Raftelis, Gina served the residents of Santa Barbara County as the first executive Communications Manager in the County of Santa Barbara's 171-year history. She advised the County Executive Team on strategic communications programs, crisis communication, media relations, issues management, internal communications, branding and culture change. During her tenure, the County Emergency Operations Center was activated 19 times and included two federally declared disasters, a global pandemic, and two mass casualty incidents. Born and raised in Phoenix, Arizona, DePinto served as public information officer for the city of Phoenix, public relations director for Farnam Companies, Inc. (animal health and pet products), and coordinated publicity for Olympic and World Champion figure skater Dorothy Hamill prior to relocating to California. Gina has a bachelor's degree in organizational communication from Arizona State University and is accredited in public relations from the Public Relations Society of America. Gina is currently a member of the California Association of Public Information Officials (CAPIO), Public Relations Society of America (PRSA), and the California Gold Coast Chapter of PRSA.

KEY PROJECT EXPERIENCE

Crisis Communications and Disaster Response (Santa Barbara County, CA)

One month after being recruited by the County of Santa Barbara to serve as its first executive Communications Manager, a wildfire began on the Gaviota Coast. Without a central communications structure in place, Gina pulled together and led a team of employees through a nine-day activation of the County Emergency Operations Center/Joint Information Center to issue 24/7 critical timely and



Specialties

- Strategic communications planning
- Crisis & risk communications
- Reputation management
- Stakeholder engagement
- Media relations & media training
- Development & oversight of earned social and paid media
- Writing, copyediting, script writing
- Collateral development and art direction
- Branding and marketing
- Public speaking

Professional History

- Raftelis: Manager, Strategic Communications (2022-present)
- County of Santa Barbara: Communications Manager (2016-2022)
- Westbound Communications: Account Director (2013-2016)
- Orange County Water District: Communications Specialist (2006-2013)
- Bylines Public Relations & Marketing: Owner/Principle (1996-2006)
- Farnam Companies: Public Relations Director (2000-2003)
- City of Phoenix: Public Information Officer (1998-2000)
- Martz Goldwater Public Relations: Senior Account Executive (1996-1997)
- Dorothy Hamill's Ice Capades: Marketing Manager & Publicist (1993-1995)

Education

- Accredited in Public Relations – PRSA (2013)
- Bachelor of Arts in Organizational Communication - Arizona State University (1987)

Professional Memberships

- Public Relations Society of America
- California Association of Public Information Officials

accurate information. The fire forced evacuations for people, pets and livestock, and intermittent closures of Hwy 101, CA State Route 1, and regional and interstate passenger trains and freight service. Two months later, another fire burned near the Santa Ynez Valley and Cachuma Lake impacting a busy commuter route. Gina initiated custom bilingual emergency messaging across all communication channels, which is now the standard in California. Over nearly six years, Gina developed bilingual communication strategies for 15 extended emergencies including two federally declared disasters, a global pandemic, and two mass casualty incidents: the Montecito 1/9 debris flow and “Conception” dive boat tragedy, California’s worst maritime accident. The back-to-back fire and debris flow disasters in December 2017 and January 2018 necessitated staffing the JIC for seven continuous months to issue public information on preparedness, recovery and rebuilding; a 16-month Local Assistance Center; and long-term Recovery Strategic Plan for Montecito.

Reputation Management and Media Training (Santa Barbara County, CA)

Gina developed a crisis communication plan, key messaging, Q&A, and media spokesperson training for two separate high-profile issues at the County of Santa Barbara: a \$40 million pension rebalance and \$2 million embezzlement in the Public Works Department. For the media training, Gina and a media training consultant provided off and on-camera guidance where participants learned how to bridge, flag and deflect. Participants were filmed so they could apply what they learned in mock, on-camera interviews. For the pension rebalance, employees were engaged through a series of face-to-face meetings with the executive and budget teams to address questions and concerns. The pension rebalance program ultimately led the County to embark on a 5-year transformation initiative and strategic plan called Renew 2022. Following the embezzlement, process improvements were implemented, and Gina developed messaging and collateral for a whistleblower program overseen by the County Auditor’s Office.

Corporate Strategic Planning (Santa Barbara County, CA)

In 2017, the County of Santa Barbara embarked on a five-year initiative to transform how County government does its work. The Renew 2022 initiative originated with an internal strategic organizational plan in 2015, followed by the Budget Rebalance effort in 2016, which was intended to address significant pension costs increases. Recognizing that the pressures and challenges the County faces were unlikely to abate in the near term, Renew ‘22 seeks to build the County’s capacity for innovation and continuous improvement through organizational transformation. The importance of this need was fortified after the Thomas Fire and Montecito debris flow disasters and most recently the COVID-19 pandemic. Quarterly and annual reporting to the Board, employees and the public provided an overview of the County’s continuing progress toward achieving “big picture goals” and other Renew ‘22 initiatives. The transformation sought to empower change, improve operations, develop sustainable revenue strategies, prepare the next generation of leaders, and refocus on customer service including multicultural and equitable public outreach – all in alignment with the priorities set by the community and the Board of Supervisors. Gina was a member of the executive decision-making team and developed a comprehensive communications and engagement plan, along with a “mission-vision-values-behaviors” campaign to communicate the County’s commitment to Renew ‘22 and its core values and behaviors that were defined and honed through the strategic planning process, employee surveys, and department leadership workshops. Deliverables included a messaging platform, fact sheets, video presentations, employee and public presentations, employee feedback surveys, logo development and branding guide, and four sessions of a one-day custom leadership development seminar scripted by Gina that was offered to 300 middle managers. Key messaging was incorporated in building signage, elevator door wraps and in stairwells used by employees and the public.

Infrastructure Outreach and Communications (Port of Long Beach, CA)

As Account Director at Orange County-based Westbound Communications, Gina led a team of six practitioners to design and manage the communication strategy for the \$1.8 billion Port of Long Beach Gerald Desmond Bridge Replacement Project, one of the largest and most significant highway infrastructure projects in California. Roughly 15 percent of the nation’s waterborne cargo is trucked over it, and the bridge is a critical access route for commuters between the Port of Long Beach (Port), downtown Long Beach and surrounding communities. The new bridge supplants an old one in dire need of replacement and is the centerpiece of the Port’s \$4 billion capital improvement plan. At 205 feet above the shipping channel, the new cable-stayed bridge is 50 feet higher than the old bridge, thus enhancing the Port’s capacity to handle today’s larger cargo ships. The Port established a unique design-build project team headquarters where the contractor, traffic engineers, Caltrans inspectors, construction managers and communications worked side-by-side to enhance collaboration and decision making.

Infrastructure Outreach and Communications Mobile App (Port of Long Beach, CA)

The challenges of a seven-year transportation construction project replete with long-term road closures, detours and congestion required clear communication and solid relationships with a broad spectrum of audiences and media. The comprehensive outreach plan to update stakeholders at every phase of the project included development of a content-rich website and mobile application to deliver real-time information directly to app customers. The app provided traffic conditions, construction updates, links to social media and live cameras, and bilingual audio reports to deliver hands-free updates to professional truck drivers and commuters. The app quickly became an important tool to reach stakeholders and build loyalty by keeping them informed through this highly visual and easily accessible new media platform. Within months of launching the app it was featured as a successful communications case study in PR Week magazine.

Census 2020 Multicultural Outreach and Community Engagement (Santa Barbara County, CA)

The County of Santa Barbara was tasked with managing and implementing the 2020 U.S. Census for the county. A Complete Count Committee (CCC) was formed of more than 100 leaders from the public, private and nonprofit sectors to help conduct widespread outreach. Gina served as the Marketing Committee Co-Chair tasked to develop and implement effective outreach strategies and tactics while maximizing resources to ensure every resident was counted, regardless of age, gender, income, home ownership, permanent address, or immigration status. Gina designed the countywide bilingual outreach campaign logo, tagline, materials and website, and a communications toolkit for CCC member agencies. The toolkits included digital and print fact sheets targeted to specific audiences (ex: seniors, college students, parents of 0-5, LatinX), brochures and brochure racks, "I'm Counted" stickers, pens, coloring books, press releases, social media, banners, and display table skirting. Gina also designed, produced, and placed the transit, radio, and digital advertising. When COVID-19 forced the suspension of in-person outreach efforts, virtual events were held, and outreach materials were included in food deliveries to the most vulnerable. Representatives from Mixteco Indigena Community Organizing Project (MICOP) and promotoras were engaged to support outreach to Spanish and Indigenous speakers. Of those self-reporting to the Census online, by phone, or by mail, Santa Barbara County ranked 13 out of the 58 counties in California and exceeded its 2010 self-response rate by 3.3 percent.

Infrastructure Outreach and Communications Campaign (Orange County, CA)

Gina led communications and outreach for the world's largest advanced water purification system for potable reuse. While Orange County's Groundwater Replenishment System (GWRS) is one of the most celebrated civil engineering and water reuse projects in the world, its success is equally recognized for the robust strategic public engagement and outreach program. In the early 2000s, public opposition had prevented or shuttered similar water reuse projects in Los Angeles and San Diego, but Orange County's system earned the public's trust and overwhelming support. The strategic communications plan included a support letter campaign, citizens advisory group, multicultural outreach, media outreach, speaker's bureau, and facility tour program with technology demonstrations and water tasting. To date, the GWRS has never been publicly opposed. Initially producing 70 million gallons of purified water per day in 2012, the GWRS final expansion will increase capacity from 100 MGD to 130 MGD, enough to secure water reliability for more than 1 million people.

Education and Outreach Program Development (Orange County, CA)

Community engagement is important to educate and inform stakeholders about critical and emerging issues. While leading strategic communications at the Orange County Water District, Gina was engaged with planning and directing content, and engaging partners and sponsors for several signature events to engage generational audiences about regional and state water resources and supplies, water efficiency and environmental sustainability. Key partners and sponsors include The Walt Disney Company, National Geographic, Wyland Foundation, UC Irvine, UCLA, NASA JPL, USGS, National Water Research Institute, California Department of Water Resources, and others to support events like the annual O.C. Water Summit, Children's Water Education Festival, and the Groundwater Adventure Tour. The Water Summit brings together academics, business professionals, elected officials, and water industry representatives to talk about water issues, projects, and emerging technologies in a dynamic forum atmosphere. The Children's Water Education Festival is the largest of its kind in the U.S. reaching 7,000 elementary students annually with interactive presentations that complement or expand upon subject matter taught in California elementary schools and adhere to Next Generation Science Standards. OCWD's Groundwater Adventure Tour takes participants to its H2O Learning Center, Groundwater Replenishment System, Advanced Water Quality Assurance Laboratory, downstream Anaheim Recharge Basins, and upstream Prado Wetlands in Riverside County.

Stakeholder Engagement for Groundwater (Orange County Water District, CA)

The Orange County Water District initiated a program to detect the location, size and source of groundwater contamination after levels of volatile organic chemicals and perchlorate that exceeded the maximum contaminant level allowed by the California Department of Public Health were detected in drinking water wells. Orange County's groundwater basin is the source of 75 percent of the drinking water for 2.4 million people. To measure the direction and speed of the migrating contamination, OCWD planned to construct six new monitoring wells. Gina developed and managed the construction outreach plan to build support from municipal leaders and assure residents that while their drinking water was safe, construction of the monitoring wells was needed to protect the deep aquifer and assure future water supplies. Construction impacts to businesses and residents required an outreach plan to determine potential impacts, mitigation efforts, and methods to communicate with stakeholders. Outreach tactics included written materials, face-to-face communication, and community meetings with maps, pictures, visuals and experts to address questions. The successful outreach program achieved 100% support of the program from all municipal partners, no public opposition, 80% acceptance from businesses and residents, and laid the foundation for the construction phase of extraction wells, pipeline and treatment facility.

Family Entertainment Marketing and Communications (U.S. and Canada)

Before working heavily in the public sector, Gina was responsible for marketing, promotions, publicity and sales for Dorothy Hamill's Ice Capades North American tour, while coordinating national and local publicity for Olympic and World Champion Dorothy Hamill. In addition to tour marketing duties, Gina coordinated weekly phone interviews and press conferences for Olympic Champion Dorothy Hamill and responded to all national media requests. Marketing tactics and duties included creating promotions and charity events to generate awareness and ticket sales; interacting with local and national media, arena management, local business leaders and performers; determining ticket prices and seating capacities for performances; purchasing television, radio and print advertising; managing budgets; and coordinating trade agreements for media time/space, hotel rooms and car rentals.

Strategic Global Media Relations (Orange County, CA)

Gina drove media relations for Orange County's Groundwater Replenishment System (GWRS) interfacing with national and international broadcast, print and online journalists. As the world's largest water reuse project of its kind, the GWRS was covered extensively by broadcast and print media including The Wall Street Journal, New York Times, Time, National Geographic, USA Today, The Economist, Der Spiegel (Germany), Christian Science Monitor, Discovery Channel, CNN, NBC News and NPR. GWRS water was featured in the 2011 water documentary, "Last Call at the Oasis" written by Alex Prud'homme and directed by Oscar-winning documentarian Jessica Yu. In a National Geographic story about California's water supply crisis (April 2010), the GWRS opened and closed the article with the quote about the ultra-pure recycled water tasting like "California's future." Following the publication, a National Geographic Vice President of Communications said of Gina's efforts that, "Nobody pitches 'National Geographic,' but somehow you found a way." Gina also initiated relationships with National Geographic "Emerging Explorer" Alexandra Cousteau, and EarthEcho International founded by Philippe Cousteau. The GWRS is featured in EarthEcho's educational book series called "Going Blue."

PRESENTATIONS

- "Business Communications," County of Santa Barbara Employee University training and development curriculum (2019)
- "Elevate Your Leadership Communication Strategies," County of Santa Barbara Leadership Certificate Program curriculum (2018)
- "Front Line Crisis Communications: Are You Prepared?" 2019 Public Relations Society of America Western District Conference, Phoenix, Ariz.
- "Emergency Communications: Technical Solutions, Political Risks, Community Information and Lessons Learned" (panelist), 2019 League of California Cities City Manager Conference, San Diego, Calif.
- "Emergency Situations and Crisis Plans for PEG Channels" (panelist), National Association of Telecommunications Officers and Advisors (NATOA), Webinar
- "Communication Tools and Methods During Times of Crisis," 2018 California Association of Public Information Officials (CAPIO) Annual Conference, Santa Rosa, Calif.

- “California’s Year of Wildfires” (panelist), 2018 California Association of Public Information Officials (CAPIO) Annual Conference, Santa Rosa, Calif.
- “Emergency Communications and the Joint Information Center” (panelist), 2018 Summer Session, Municipal Managers Association of Southern California (MMASC), Pasadena, Calif.
- “Natural Disasters” panelist “Santa Barbara County Thomas Fire and 1/9 Montecito Debris Flow Communications,” 2018 National Information Officers Association (NIOA) Annual Conference, Clearwater Beach, Fla.

PUBLICATIONS

- “Customer Satisfaction Plunges As Rates Rise; What the Latest J.D. Power Study Report Tell Us and What You Can Do About It,” Think Tank, Raftelis, June 2022
- “Alisal Fire – Flood After Fire Threat Preparations,” consumer preparedness article, October 17, 2021
- “Behind the Scenes with the Emergency Public Information Communicators (EPIC),” guest editorial, Santa Barbara Noozhawk, April 13, 2017
- “Environmental Law Practice Grows,” guest editorial, Arizona Capitol Times, March 28, 1997
- “Build Brand Equity: A Race to the Finish,” guest editorial, Equestrian Retailer (B2B), September 2003
- “A New Way to Behave,” contributed feature article, Pet Business (B2B), February 2003

Matt Wittern APR, PMP

PROJECT COORDINATOR/CONTENT DEVELOPER

Senior Consultant



ROLE

Matt will support the team in conducting analyses and preparing deliverables for the project.

PROFILE

Matt has a 20+ year public relations career serving clients and customers in the public utility, engineering, and construction sectors. He excels at designing and implementing strategic communications campaigns that incorporate stakeholder input to inform, advocate, and achieve behavior change. His specialty is successfully translating complex subjects and concepts into messages that are easily understood by target audiences. Matt manages strategic communications planning and implementation, as well as stakeholder engagement initiatives. Prior to joining Raftelis, Matt managed a variety of public affairs efforts at Denver Water, which included designing the public engagement and public information strategies for nearly a billion dollars' worth of infrastructure projects, spearheading the public process for the utility's policy decision regarding Community Water Fluoridation, and led development of processes to gain stakeholder support for preventative maintenance on critical infrastructure. He earned a B.A. in journalism, is Accredited in Public Relations (APR) from the Public Relations Society of America (PRSA) and achieved status as a Project Management Professional (PMP) from the Project Management Institute. Matt has presented at national conferences including the American Water Works Association's ACE and the City-County Communications and Marketing Association's (3CMA) Annual Conference. Matt's work has earned prestigious Gold Pick Awards from the Colorado Chapter of PRSA and SAVVY Awards from 3CMA.

KEY PROJECT EXPERIENCE

Government and Stakeholder Relations (Denver Water, CO)

Matt served for many years in Denver Water's Public Affairs Division, where he managed community outreach and public information initiatives from small water main replacement projects impacting neighborhoods all the way up to strategic communications for the half billion-dollar project to raise Gross Reservoir Dam to increase the facility's storage capacity. Matt also spearheaded the public process to evaluate alternatives related to the Denver Water Board of Water Commissioners' Community Water Fluoridation policy.

Stakeholder Engagement and Communications (Town of Jackson, WY)

The Town of Jackson, located in Teton County, boasts among the highest incomes of any county in the United States. Juxtaposed against that is the thousands of hourly and service industry jobs that support the vibrant tourism industry, and Raftelis accepted the challenge to develop a water and wastewater

Specialties

- Strategic communication planning
- Stakeholder engagement
- Public involvement
- Community outreach
- Primary & secondary research
- Expert positioning
- Media relations
- Social media
- Art direction
- Reputation management
- Coalition building
- Advocacy campaigns

Professional History

- Raftelis: Senior Consultant (2019-present)
- Denver Water: Senior Community Relations Specialist/Communications Manager (2015-2019)
- Communication Infrastructure Group: Counselor (2006-2015)
- CollegInvest: Marketing Communications Manager (2005-2006)
- Transportation Expansion (T-REX) Project: Community Relations Manager (2002-2005)
- LawsComm: Client Service Coordinator (1998-2002)

Education

- Bachelor of Arts in Technical Journalism (Public Relations) - Colorado State University (1999)

Professional Memberships

- Public Relations Society of America: Accredited in Public Relations (APR)
- Project Management Institute - Project Management Professional (PMP)
- International Association of Public Participation (IAP2) - Certified in Public Participation
- WEF
- AWWA

rate structure that was fair and equitable, while pricing in complications such as the prevalence of seasonal homes that only had seasonal demand and impact on the system. Matt led the creation of a Citizen Review Committee made up of representatives from myriad stakeholder groups. Through a series of meetings facilitated by Matt, the CRC ensured that the recommendation ultimately delivered to the Town Council was representative of the community and included measures for affordability. In addition, Matt was the architect of a multi-pronged strategic communications program that helped raise awareness of, and support for, changes to the rate structure among town residents. This included developing a suite of communication tools including newsletter articles, website copy, bill stuffers, graphics, social media content, and a capstone printed piece that summarized the study process.

Stakeholder Engagement and Brand Identity Development (City of Wheat Ridge, CO)

Matt was the project manager on the team hired to design and implement a community-based brand identity development for the City of Wheat Ridge. The City's existing brand was designed by a high school student in the mid-1970s and despite the brand's age and dated nature, there were voices in the community opposed to the City's rebranding. Matt designed a process that brought together key community stakeholders using a variety of public engagement techniques to draw out from them their view of what was quintessentially Wheat Ridge. These elements were then distilled down to core themes that were woven into the City's new identity. While there was no consensus on what made Wheat Ridge Wheat Ridge, each group could literally point to an element of the brand and buy-in to the brand as a whole. The result was a process that City Council members praised as the model for how City staff should encourage public involvement. A post-project survey found that 70 percent of respondents agreed that the new identity represents the City as a positive, progressive community.

Expert Positioning (Western Municipal Water District, CA)

Following a successful water rate study and after defeating a court challenge, Western hired Raftelis to draft an article to share its story with other nearby providers on the tricky issue of water budgets. Working closely with the water district's General Manager and legal counsel, Matt authored a piece and developed accompanying graphics that were accepted for publication by editors at *Journal AWWA*.

Water Rate Change Communications and Proposition 218 Notice (City of Newport Beach, CA)

The City of Newport Beach Utilities Division provides water service to more than 86,000 people over 50 square miles. There was significant resistance to past water rate increases in this high-income community composed of primarily single-family residential properties. For four years, the City Council declined to increase rates, but with costs rising by 75% in recent years, the time had come for action. Matt was on the Raftelis team charged with developing a comprehensive strategic communications plan, messaging and communications tools, including a Proposition 218 notice. The effort communicated the great need for infrastructure improvements to ensure continued delivery of high-quality drinking water and water for fire protection. Ultimately, the City Council voted to approve an increase in rates.

Stakeholder Engagement and Communications (City of Port Hueneme, CA)

A rate study had not been performed for some time for this small coastal city, and the City Council stressed that affordability was a key factor for their approval. They also stressed the importance of transparency, especially as it related to ensuring the community's significant population of individuals for whom English was not their primary language. As the strategic communications project coordinator, Matt conducted public outreach efforts for the City that included development of an infographic to explain the City's rate structure changes, a Proposition 218 notice, and facilitation of several public workshops to communicate the changes. All materials were translated into Spanish to enable communication across a potential language barrier. Raftelis' recommended rates were subsequently adopted by City Council.

Water Rate Change Communications (Cucamonga Valley Water District, CA)

The Cucamonga Valley Water District in California's Inland Empire was updating its rates and fees to account for a modified pass-through fee for State Water Project water, along with aligning its tiered rate structure to follow the varied costs of different sources of water more closely. In addition, CVWD's financial plan and Capital Investment Plan called for infrastructure upgrades to its aging water infrastructure before costly breaks and outages became more common. Matt coordinated the implementation of a strategic communications and outreach plan that included communication tools such as bill stuffers, FAQs, a fact sheet/infographic, and Proposition 218 notice. Misinformation about the proposed rate increase was quickly rebutted and the board of directors unanimously approved Raftelis' rate recommendation in 2021.

Stakeholder Engagement and Communications (City of Santa Cruz, CA)

Residents of this popular tourist destination are some of the most water wise in the entire country, and pride themselves on their low per-capita water use. Raftelis was engaged to perform a detailed water rates study that included a concurrent public involvement component. Over a period of 18 months –made more difficult by the COVID-19 pandemic – Matt and colleagues at Raftelis provided strategic communications counsel and facilitated stakeholder outreach and engagement activities that informed the rate study process. This process included development of an online engagement community from scratch, multiple community presentations and strategic communication tools. Further, Matt led development and provided art direction on the legally required Proposition 218 Notice.

Water Efficiency Communications (City of St. Helena, CA)

Like many of its neighbors, the City of St. Helena is working to combat the effects of climate change. For this community in California’s wine country, customers needed to dramatically curtail their water usage to avoid more painful water restrictions. But with a modest in-house staff, the City asked Raftelis to jump in to help communicate a suite of conservation messages. Within just a period of days, Matt developed conservation messaging, social media content, infographics, newsletter articles, giveaways, fact sheets, and other tools to raise awareness among the City’s water customers, which helped result in considerable water conservation.

PRESENTATIONS

- “Building Support for Water Rate Increases” Colorado Municipal League 2021 Annual Conference
- “Biosolids Communication Toolkit Workshop” Water Environment Federation
- “Re-imagining Engagement: Harvesting what we’ve learned about virtual public engagement for the future” ACE ’21 Annual Conference
- “Re-imagining Engagement: Harvesting what we’ve learned about virtual public engagement for the future” Arizona Water Association 2021 Annual Conference
- “It’s Human Nature: Using Social Science to Enhance Your Communications,” RMSAWWA/RMWEA, 2020
- “Ensuring Public Process Legitimacy Through the Lens of The Community Water Fluoridation Issue,” AWWA ACE Conference, 2016

PUBLICATIONS

- “Protecting Against Water Rate Challenges With the Equivalent of Bear Spray”, Article, Journal AWWA, 2022
- “Leverage Social Media in Times of Crisis”, Article, Journal AWWA, 2020

David George

CREATIVE DIRECTOR

Marketing and Creative Director



ROLE

David will work closely with Gina to provide creative direction and oversee design, production and scheduling of the branding and design work for this project.

PROFILE

With 16 years of marketing and design experience, David serves as Raftelis' Creative Services Director. In this role, he oversees the firm's marketing efforts and leads the development and execution of Raftelis' overall brand strategy and creative vision. In addition to his internal role, David provides creative direction for the Creative Service Team's design work. This has included the development and design of a variety of communications materials for projects like strategic plans, organizational assessments, financial plans, rate studies, stormwater program development, affordability program development, and stakeholder engagement.

KEY PROJECT EXPERIENCE

Charlotte Water (NC)

Equity. Sustainability. Resilience. As the main focus areas of the City of Charlotte's 2020 Budget, these goals are critical as Charlotte continues to grow and flourish as a richly diverse community. Very few services provided by the City have as much influence as water service, and it was critical that Charlotte Water's strategic plan both reflect and advance these goals. Raftelis was engaged to facilitate Charlotte Water's strategic plan, and David provided creative direction for a highly graphical strategic plan report.

The Environmental Policy Innovation Center's Water Data Competition

In September 2020, The Environmental Policy Innovation Center's (EPIC) launched the Water Data Prize competition to obtain market-based solutions for improving and elevating the readability, accessibility, and quality of the EPA-mandated Consumer Confidence Report (CCR). Out of more than 30 organizations and individuals in the water sector who submitted entries, Raftelis was the top prize winner. Raftelis' submission centered on the goal of accessibility to all audiences and rewrote the typical language of a sample CCR (Watertown). David provided creative direction for the website and PowerPoint to ensure that the design was engaging, employed good user experience principles, and was accessible to different audiences.

OTHER NOTABLE CLIENTS

- National Association of Clean Water Agencies (DC)
- Pittsburg Water and Sewer Authority (PA)
- DC Water (DC)
- Metro Water Services of Nashville and Davidson County (TN)

Specialties

- Creative direction
- Print design
- Branding and marketing strategy

Professional History

- Raftelis: Marketing and Creative Director (2014-present); Marketing Coordinator (2009-2013) – 12+ years with Raftelis
- ESP Associates, P.A.: Marketing Coordinator (2008-2009); Marketing Associate (2005-2008)

Education

- Bachelor of Science in Business Administration - University of North Carolina, Wilmington (2005)

GRAPHIC DESIGNERS

Our team of skilled graphic designers will provide print and digital design services.



Amanda Wahula

Title: Creative Services Manager

Amanda has 10 years of experience creating engaging digital and print designs for a broad range of clients. She has five years of experience with Raftelis working on a variety of design and communications projects for public agencies across the U.S. She has experience creating engaging deliverables for use in stakeholder meetings, strategic plans, websites, email campaigns, and materials for communicating the need for rate changes to the public.

Key Projects: Charlotte Water, The Environmental Policy Innovation Center's Water Data Competition, National Association of Clean Water Agencies, and Pittsburgh Water and Sewer Authority



Ashley Perry

Title: Graphic Designer/Marketing Associate II

Ashley has six years of print and digital design experience working for a variety of clients. In her four years with Raftelis, Ashley has provided support for the firm's internal marketing efforts as well as external projects for clients throughout the United States. Her role includes collaborating with project managers to produce high profile deliverables such as strategic plans, dashboards, websites, email campaigns, and other public facing communication materials.

Key Projects: The Environmental Policy Innovation Center's Water Data Competition, Pittsburgh Water and Sewer Authority, Des Moines Metropolitan Wastewater Reclamation Authority, and Milwaukee Metropolitan Sewerage District



Malinna San

Title: Graphic Designer/Marketing Associate II

Malinna has six years of marketing and graphic design experience. Her work has included assisting with the design of for various deliverables and communications materials projects like infographics, strategic plans, reports, collaborative briefing books, and email marketing.

Key Projects: Sacramento Regional County Sanitation District & Sacramento Area Sewer District, Cucamonga Valley Water District, City of Vista and Buena Sanitation District, City of Malibu, City of Avondale, and Fairfax Water



Victoria Baldwin

Title: Graphic Designer/Marketing Associate I

Victoria has five years of print and digital design experience. Her design work has included strategic plans, video campaigns, logos, PowerPoint presentations, infographics, digital ads, and other public facing communication materials.

Key Projects: Association of State Drinking Water Administrators, National Association of Clean Water Agencies, and Grand Strand Water Authority



Stephen Francis

Title: Graphic Designer/Marketing Associate I

Stephen has six years of experience creating print, digital, and experiential design. He has several years working in advertising, digital marketing, and user experience design.

Key Projects: City of Corpus Christie, Carpinteria Groundwater Sustainability Agency, Charlotte Water, New Castle County, Puerto Rico Aqueduct and Sewer Authority, and the California-Nevada Section of AWWA

Subcontractor List

Raftelis will not have a subcontractor for this project.

Cost Proposal

The following table provides a breakdown of our proposed fees and estimated costs associated with this RFP. The first table provides the hourly rates for all roles on the project and estimated travel expenses are noted whether they are per trip or per day.

Team Member	Sam Villegas	Gina DePinto	Matt Wittern	Creative Services
% of Total Project Time	2.0%	65%	13%	20%
Hourly Rates	\$285	\$250	\$220	\$120
Mileage	N/A	N/A	N/A	N/A
Airfare	N/A	N/A	N/A	N/A
Hotel	N/A	N/A	N/A	N/A
Parking	N/A	N/A	N/A	N/A
Meals	N/A	N/A	N/A	N/A

The following tables provide estimates of the cost per activity based on a 6-month project completion timeframe. This estimate does not include translation or interpretation services, advertising placement costs, printing, video production or installation of signage and materials.

Activity 1 (Completed months 1-3)		
Planning and Meetings	Kick-off workshop (generally 4 hours) and summary report, 8 bi-weekly meetings and meeting summary reports	\$2,875
Research	Identification and coordination of research methodology, research implementation plan, implement 3 surveys, 2 focus groups, and 8 influencer interviews	\$17,500
Facility Branding	Facility tour and branding inventory spreadsheet	\$2,000
TOTAL		\$22,375

Activity 2 (Completed months 4-5)		
Meetings	Bi-weekly meetings and meeting summary reports	\$1,500
Logo/Brand Design	Min. 6-8 logo concepts, final logo package, Brand Style Guide, recommendations for signage/wayfinding signage	\$3,700
Development of Strategic Communications and Marketing Implementation Plan	Draft plan, one revision, final report, presentation to your leadership and City Council	\$8,500
TOTAL		\$13,700

Activity 3 (Completed months 5-6)		
Meetings	Biweekly meetings and meeting summary reports	\$1,500
Logo/Brand Design	Min. 4 logo concepts for Event Center, final logo package, website redesign recommendations, Brand Style Guide, recommendations for signage/wayfinding signage	\$4,100
Development of Carson Event Center Strategic Communications and Marketing Implementation Plan	Draft plan, up to 2 revisions, final report, presentation to your leadership and City Council	\$8,300
TOTAL		\$13,900

CLIENT REFERENCE LIST

In order to more fully evaluate your background and experience for the project herein proposed, it is requested that you submit a list of references and/or similar projects completed or in progress within the last 24 months or as noted in the requirements of the RFP or IFB. Your cooperation in this matter is greatly appreciated.

Company Name: Raftelis Financial Consultants, Inc.

Number of years as a contractor in the work of this type: 30+ individually; 100+ years collectively

Three projects/clients references for this type of work:

Client Name City of Corpus Christi

Address 1201 Leopard Street, Corpus Christi, TX 78401

Contact Name Al Raymond Contact Email alraymond@cctexas.com

Contact Phone Number 361-826-3240

Project Description Develop and implement strategic communications plan for Developing Our Future: Corpus Christi. Deliverables include strategic communication plan, logo development, messaging, materials, project website.

Project Start Date January 2022 Project End Date Spring 2023

Project Amount: Approx. \$90K

Client Name City of Fairfax

Address 10445 Armstrong Street, Fairfax, VA 22030

Contact Name Brooke Hardin Contact Email brooke.hardin@fairfaxva.gov

Contact Phone Number 703-385-7821

Project Description Develop and execute a strategic communications and engagement plan for the joint redevelopment of the Sherwood-Willard Health and Community Center.

Project Start Date Fall 2021 Project End Date Fall 2022

Project Amount: Approx. \$30K

Client Name Montecito Water District

Address 583 San Ysidro Road, Santa Barbara, CA 93108

Contact Name Laura Camp, Public Information Contact Email lcamp@montecitowater.com


Contact Phone Number 805-969-2271

Project Description Using a multi-layered communication and outreach approach, Raftelis helped build awareness of the need for water system investments that resulted in broad community support for water rate increases.

Project Start Date February 2020

Project End Date July 2020

Project Amount: Approx. \$25K

Bidder's Signature  _____

NOTE: If requested by the City, the bidder shall furnish a certified financial statement, references, and other information sufficiently comprehensive to permit an appraisal of his current financial condition.

Modification, Changes or Exceptions to the City Contract of Service Agreement Template

We request that the City consider making the following modifications, shown in red below, to the Professional Services Agreement. Please contact us if you have any questions or concerns about these modifications.

1.1 Scope of Services.

... Consultant shall at all times faithfully, competently and to the best of its ability, experience and talent, perform all services described herein. Consultant covenants that it shall follow the highest professional standards **in its profession prevailing at the time and place** in performing the work and services required...

5.1 Insurance Coverages.

The Consultant shall procure and maintain, at its sole cost and expense, in a form and content satisfactory to City, during the entire term of this Agreement including any extension thereof, the following policies of insurance **which shall cover all elected and appointed officers, employees and agents of City:**

5.3 Indemnification.

To the full extent permitted by law, Consultant agrees to indemnify, defend and hold harmless the City, its officers, employees and agents (“Indemnified Parties”) against, **and will hold and save them and each of them harmless from, any and all** actions, either judicial, administrative, arbitration or regulatory claims, damages to persons or property, losses, costs, penalties, obligations, errors, omissions or liabilities whether actual or threatened (herein “claims or liabilities”) that may be asserted or claimed by any person, firm or entity **arising out of or in connection with** **caused by** the negligent performance of the work, operations or activities provided herein of Consultant, its officers, employees, agents, subcontractors, or invitees, or any individual or entity for which Consultant is legally liable (“indemnitors”), or **arising from** **caused by** Consultant’s or indemnitors’ reckless or willful misconduct, or **arising from** **caused by** Consultant’s or indemnitors’ negligent performance of or failure to perform any term, provision, covenant or condition of this Agreement, and in connection therewith:

Consultant will defend any action or actions filed in connection with any of said claims or liabilities **and will pay all costs and expenses**, including legal costs and attorneys’ fees incurred in connection therewith;

In the event the City, its officers, agents or employees is made a party to any action or proceeding filed or prosecuted against Consultant for such damages or other claims arising out of or in connection with the negligent performance of or failure to perform the work, operation or activities of Consultant hereunder, Consultant **agrees to pay to the City, its officers, agents or employees, any and all costs and expenses incurred by the City, its officers, agents or employees in such action or proceeding, including but not limited to, legal costs and attorneys’ fees** shall defend the City.

6.3 Ownership of Documents.

All drawings, specifications, maps, designs, photographs, studies, surveys, data, notes, computer files, reports, records, documents and other materials (the ~~“documents and materials”~~ “**Deliverables**”) prepared by Consultant, its employees, subcontractors and agents in the performance of this Agreement shall be the property of City and shall be delivered to City upon request of the Contract Officer or upon the termination of this Agreement, and Consultant shall have no claim for further employment or additional compensation as a result of the exercise by City of its full rights of ownership use, reuse, or assignment of the documents and materials hereunder. Any use, reuse or assignment of such completed documents for other projects and/or use of uncompleted documents without specific written authorization by the Consultant will be at the City’s sole risk and without liability to Consultant, and Consultant’s guarantee and warranties shall not extend to such use, reuse or assignment. Consultant may retain copies of such documents for its own use. Consultant shall have the right to use the concepts embodied therein. All subcontractors shall provide for assignment to City of any documents or materials prepared by them, and in the event Consultant fails to secure such assignment, Consultant shall indemnify City for all damages resulting therefrom. ~~Moreover, Consultant with respect to any documents and materials that may qualify as “works made for hire” as defined in 17 U.S.C. § 101, such documents and materials are hereby deemed “works made for hire” for the City.~~

6.4 Confidentiality and Release of Information.

(b) Consultant, its officers, employees, agents or subcontractors, shall not, without prior written authorization from the Contract Officer or unless requested by the City Attorney, voluntarily provide documents, declarations, letters of support, testimony at depositions, response to interrogatories or other information concerning the work performed under this Agreement. Response to a subpoena, ~~or~~ court order, ~~or other legal process~~ shall not be considered “voluntary” provided Consultant gives City notice of such court order or subpoena.

**CITY OF CARSON
AFFIDAVIT OF NON-COLLUSION AND NON-DISCRIMINATION**

I hereby swear (or affirm) under the penalty of perjury:

That the attached proposal or bid has been arrived at by the responder independently and has been submitted without collusion with and without any agreement, understanding, or planned common course of action with any other firm or entity designed to limit fair and open competition;

That the contents of the proposal or bid response have not been communicated by the responder or its employees or agents to any person not an employee or agent of the responder and will not be communicated to any such persons prior to the official opening of the solicitation responses; and

The proposer/bidder does not and shall not discriminate, will provide equal employment practices, and will adhere to an affirmative action program to ensure that in their employment practices, persons are employed and employees are treated equally and without regard to or because of race, religion, ancestry, national origin, sex, sexual orientation, age, disability, marital status or medical condition.

I certify that the statements in this affidavit are true and accurate.



Signature

June 14, 2022

Date

Samantha Villegas, APR

Printed Name

Director of Strategic Communications Services

Title

**FEDERAL LOBBYIST
REQUIREMENTS CERTIFICATION**

Name of Firm: Raftelis Financial Consultants, Inc. Date: June 14, 2022

Address: 550 N. Figueroa Street, Suite 1925

State: CA Zip Code: 90071 Phone No.: 571.336.8550

Acting on behalf of the above-named firm, as its Authorized Official, I certify as follows:

1. No Federal appropriated funds have been paid, by or on behalf of the above named firm to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of and Federal grant, loan or cooperative agreement, and any extension, continuation, renewal, amendment, or modification thereof, and;

2. If any funds other than Federal appropriated funds have paid or will be paid to any person for influencing or attempting to influence an officer or employee or any agency, a Member of Congress an officer or employee of Congress or an employee of a Member of Congress in connection with this Federal contract, grant loan, or cooperative agreement, the above named firm shall complete and submit Standard Form-LLL, "Disclosure Form to Report Lobbying", in accordance with its instructions, and:

3. The above-named firm shall require that the language of this certification be included in the award documents for all sub-awards at all tiers (including subcontracts, sub-grants, and contracts under grants, loans, and cooperative agreement) and that all sub-recipients shall certify and disclose accordingly.

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into the transaction imposed by Section 1352 Title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

Authorized Official:

Name: Samantha Villegas, APR Title: Director of Strategic Communications Services

Signature:  Date: June 14, 2022

DEBARMENT AND SUSPENSION CERTIFICATION

Name of Firm: Raftelis Financial Consultants, Inc.

Acting on behalf of the above-named firm ("Consultant"), as its Authorized Official, I, the undersigned, certify as follows:

I am a duly authorized representative of ("Consultant"). Consultant certifies, to the best of its knowledge and belief, that Consultant, including its principals:

Is not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any federal department or agency, and not does not have a proposed debarment pending;

Has not within the three-year period preceding this certification been convicted of or had a civil judgment rendered against it for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (federal, state or local) transaction, contract, or subcontract under a public transaction; for violation of federal or state antitrust statutes; or for commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements or receiving stolen property;

Is not presently indicted for or otherwise criminally or civilly charged by a governmental entity (federal, state, or local) with commission of any of the offenses enumerated in paragraph (2) above; and


Has not within the three-year period preceding this certification had one or more public transactions (federal, state or local) terminated for cause or default.

Consultant further certifies that Consultant, including its principals, is not listed on the government-wide exclusions in the System for Award Management.

Consultant acknowledges that falsely providing this certification may result in criminal prosecution or administrative sanctions, and that this certification is a required component of all proposals in response to this RFP/IFB.

A proposal that does not include a completed and signed version of this certification will be deemed incomplete and materially nonresponsive, and will not be considered.

CONSULTANT

By:  Samantha Villegas, APR

Title: Director of Strategic Communications Services

Date: June 14, 2022

**CERTIFICATE OF COMPLIANCE WITH LABOR CODE SECTION
3700**

Name of Firm: Raftelis Financial Consultants, Inc.

Acting on behalf of the above-named firm ("Consultant"), as its Authorized Official, I, the undersigned, certify as follows:

Consultant is aware of the provisions of Section 3700 of the California Labor Code, which require every employer to be insured against liability for workers' compensation or to undertake self-insurance in accordance with provisions of that code, and will comply with such provisions before commencing the performance of the work under any contract awarded in response to Consultant's proposal.

CONSULTANT

By:  Samantha Villegas, APR

Title: Director of Strategic Communications Services

Date: June 14, 2022

APPENDIX:

Project Approach



Project Approach

On the following pages, we've outlined our approach to ensure an inclusive and collaborative approach involving the participation of city partners, community stakeholders, employees and the public needed to inform comprehensive strategic communications and marketing implementation plans with actionable and measurable strategies to achieve the City's key objectives. The final plans will serve as a roadmap to elevate and transform the City's current communications and branding efforts. Please consider this scope of work a starting point to be refined with your input.

Activity 1: Research

At the start of this engagement with you, we will kick things off with a workshop to meet your team and hear directly from you about specific elements of your communications and marketing programming, structure, challenges, opportunities, and overall effectiveness. In preparing for this proposal, we've identified some strengths and opportunities that we will share. In this workshop, we will review scope and schedule, develop a deeper understanding of the issues you're seeking to address, and the local environment in which you work. We will also spend time talking about the diverse community you serve and conduct a stakeholder mapping exercise to help us identify and prioritize key stakeholders in the community. The outcome of this meeting will be a shared understanding of your current situation, your stakeholders, your goals and success measures, and any issues at play that may impact success.

For the communications and marketing plans identified in the project scope, we will develop a strategy that's steeped in research and supports transparency and meaningful, two-way communication with the identified target communities and stakeholder groups, including City employees. Strategies for engaging audiences will be tailored to meet them where they are.

Research will be conducted using a proven process of qualitative and quantitative methodologies that may include influencer interviews, focus groups, online surveys, and in-person open houses. We'll consult with key community organizations and consider shared and unique stakeholder groups for the Carson Event Center.

Using all that's learned in the research, we will collaborate with your team to develop communications and marketing strategies and action plans that seize past successes and strengths integrated with effective new opportunities.

Using all that's learned in the research, we will collaborate with your team to develop communications and marketing strategies and implementation plans that seize past successes and strengths. The plans will integrate existing communications that have been effective with new opportunities across paid, earned, shared, and owned channels to ensure proactive engagement with – and heightened awareness from – all stakeholders.

PLANNED MEETINGS

- Kick-off meeting (preferably in person, but can be done virtually)
- Facility tour with staff from City Public Information and Facility Maintenance to identify branding and signage opportunities, including street and wayfinding signage (in person)

- Weekly or biweekly progress calls to ensure continued adherence to scope, schedule and budget (virtual)
- Present draft research methodology plan (virtual)
- Present final research methodology plan (virtual)

DELIVERABLES

- Kick-off workshop Agenda, PowerPoint presentation and summary report
- Agendas and summaries of all weekly or biweekly meetings
- Inventory spreadsheet of signage needs by location and size
- Research methodology plan with key audiences, messaging framework, strategies, tactics, and timeline
- Implement research activities (influencer interviews, focus groups, surveys, open houses, etc.)

Activity 2: Development of the Strategic Communications and Marketing Implementation Plan

Raftelis will develop a comprehensive Strategic Communications and Marketing Implementation Plan to guide the City's efforts with the following goals:

- Analyze research findings
- Assess existing communications programs and materials
- Assess the perception of the City's communications efforts among a variety of constituencies
- Identify opportunities to increase the effectiveness of communications processes and tools
- Recommend specific action steps that will enhance the City's future communications success
- Recommend facility branding and signage plan with estimated costs for design, production, and installation

This plan should be considered a blueprint for the City to refine its communications program into a formal part of its institutional structure and culture. Yet, the plan is never truly final as it should be evaluated periodically to measure the effectiveness of your communication and marketing efforts and adjusted and refined as needed. The plan will include the following components:

1. Situation analysis/environmental scan informed by research that identifies the areas and issues of which the City must be aware. It is used to support every element of the plan. This also includes a review of the City's brand, logo, and materials currently being used to raise awareness of the City's services, programs, infrastructure needs, and financial status.
2. Communication goals and objectives that are SMART: Specific, Measurable, Achievable, Relevant and Timebound.
3. Using all that is learned in the research phase, stakeholder identification ensures key influencers are connected to the communication process and that we are leveraging partners that can be advocates.
4. Community outreach strategies and tactics that help secure input and support from a broad spectrum of stakeholders. Particular areas of focus will be to analyze accessibility and visibility across the City's diverse communities and increase awareness and value in the City's brand locally and regionally.
5. Public participation techniques that provide effective engagement to thoughtfully integrate public input into the City's decision-making process. Public participation results in better outcomes and better governance. Engaged communities develop long-term capacity to solve and manage challenging social issues, often overcoming longstanding differences and misunderstandings.

6. Recommended communication channels, tools and tactics that include a layered, multi-channel strategy to raise awareness and build understanding. Some of the communication materials and templates we may recommend include content for written and digital communication channels, presentations, infographics, advertising and signage.
7. Messaging platform, timeline, and distribution recommendations to provide clear, compelling, and consistent messages that are also adaptable and flexible to accompany outreach.
8. Internal communication strategies and templates that are designed to ensure employees are well-informed and can become effective brand ambassadors for the City.
9. Media relations and social media recommendations and tactics to move the City toward being further seen as trusted, fair, inclusive, and transparent - not because you have to be, but because you want to.
10. Workflow and tactical plan that ensures that the team (both internal and consultant) understand roles and responsibilities for successful implementation.

KEY DECISION POINTS

- Respond to research findings
- Identify budget and timeline for logo and signage/wayfinding creative development, assuming production and installation will be coordinated with the City's facility maintenance staff and external vendors (if needed, we can refer a vendor in the L.A. area that Gina previously contracted for wayfinding and other signage and collateral)
- Review and comment on design mockups whether for a complete rebrand or if we're tasked to enhance the City's existing brand

PLANNED MEETINGS

- Weekly or biweekly progress calls to ensure continued adherence to scope, schedule and budget
- Present draft strategic communications and marketing implementation plan (virtual)
- Present final strategic communications and marketing implementation plan (virtual or in-person)

DELIVERABLES

- Logo package and Brand Style Guide
- Signage/wayfinding signage and facility branding options
- Agendas and summaries of all planned meetings
- Draft Strategic Communications and Marketing Implementation Plan
- Final Strategic Communications and Marketing Implementation Plan
- Presentations to your leadership and City Council

Activity 3: Development of the Strategic Communications and Marketing Implementation Plan for the Carson Event Center

Raftelis will develop a comprehensive Strategic Communications and Marketing Implementation Plan for the Carson Event Center that considers and includes findings from the research phase (Activity 1), as well as insights from and aspects of developing the City's strategic communications and marketing implementation plan, branding, and style guide. The Event Center is not only a revenue source for the City, but a valuable asset and source of pride. Event Center branding should complement and fit with the City's overarching brand especially because City services are housed at the event facility.

The plan will include the following goals:

- Analyze research findings
- Assess existing Event Center communications programs and materials, including the various names attributed to the Center, i.e., Community Center, Event Center, Congresswoman Juanita Millender-McDonald Community Center at Carson
- Assess perceptions of the Event Center among a variety of constituencies including vendors and event/meeting planners
- Identify opportunities to increase the effectiveness of marketing processes and tools
- Recommend specific strategies and action steps to ensure the entire facility is utilized to its maximum potential and successfully marketed through B2B and B2C channels
- Recommend website redesign, branding, and signage plan with estimated costs

KEY DECISION POINTS

- Respond to research findings
- Identify budget and timeline for logo development, website redesign or enhancements, promotional activities, and advertising (digital and traditional)
- Review and comment on design mockups

PLANNED MEETINGS:

- Weekly or biweekly progress calls to ensure continued adherence to scope, schedule and budget
- Present draft strategic communications and marketing implementation plan (virtual)
- Present final strategic communications and marketing implementation plan (virtual or in-person)

DELIVERABLES:

- Logo package, website redesign, Brand Style Guide, signage/wayfinding signage and facility branding recommendations
- Agendas and summaries of all planned meetings
- Draft Strategic Communications and Marketing Implementation Plan
- Final Strategic Communications and Marketing Implementation Plan
- Presentations to your leadership and City Council

NOTE: If requested, we can design all new collateral for the Event Center including a marketing kit, brochure, rack card, event floor plans, photo gallery, etc.