

**REQUEST FOR PROPOSALS:
COMMUNICATIONS AGENCY/CONSULTANT**

A. Introduction

The Public Health Institute (PHI) is a global leader in public health. PHI is dedicated to promoting health, well-being, and quality of life for people around the world through innovative solutions and collaborative partnerships. PHI is dedicated to improving health and wellness by discovering new research, strengthening key partnerships and programs, and advancing sound health policies. During its more than 50 years as an independent nonprofit, the Public Health Institute has led and fiscally sponsored hundreds of projects and programs ranging from small task order contracts to large, multi-site research programs with national and international significance.

In support of an increased focus on development efforts to raise unrestricted funds, PHI is seeking bidders to provide the services and specifications as outlined below for a Writer/Consultant to develop a strategy for and create a case statement that will persuade donors of PHI's need for increased investment and capacity to successfully steward donor dollars. The consultant will work with board members, senior management, and Principal Investigators/Project Directors (PI/PDs) to home in on audiences, message, need and compelling stories.

B. Proposal Format

In order for PHI to conduct the most efficient proposal evaluation, bidders are required to include the following information in their proposals as described below:

- 1. Contact Information** – A description of the bidder and detailed contact information.
- 2. Price Schedule** – A description of the bidder's price schedule – project will be deliverable based.
- 3. Capability Statement** – A detailed response to the service/specifications requested.
- 4. Bidder's References** – A list of references with detailed contact information (3 minimum).

C. Submission of Proposals & Closing Time

Please submit proposals to:

Barbara Daniels
Email: barbara.daniels@phi.org

Proposals are due by:

Friday, November 16, 2018
5:00pm – Pacific Standard Time

Interviews:

Select bidders will be invited to PHI offices for in-person interviews.

Decision Date:

Bid will be awarded no later than January 7th, 2019

All questions pertaining to this proposal must be made via email to Barbara Daniels at barbara.daniels@phi.org.

PHI will select the bidders whose offer will provide the most favorable mix of corporate credentials and cost, thereby ensuring overall best value procurement.

The following evaluation criteria will be utilized to evaluate the proposals by an internal evaluation team from PHI:

- Technical Capacities
- Past Performance
- Cost Reasonableness
- Cost Competitiveness

D. Required Services / Specifications

1. Detailed Scope of Work:

a. Preliminary market scan and assessment.

1. Identify similar organizations structured as fiscal sponsorship models.
2. Assess key messaging/marketing efforts.

b. Key informant interviews.

1. Interview a curated list of key informants including board of directors, PHI Principal Investigators and senior management.

c. Develop and present a short brief detailing planned approach and capture list for case statement.

d. Create and write case for support and supplemental case statement(s).

e. Create and launch internal stakeholder trainings(s) related to case for support use.

2. Requirement(s):

- a. The successful bidder has a proven track record for creative excellence in creating compelling marketing and communications materials that distil complex ideas into easily understood (and delivered) messages and stories, and a portfolio that demonstrates this mastery.
- b. There is a preference for a bidder who has produced similar documents for public health, foundation, fiscal sponsorship, research universities and/or similarly large and complex organizations that have broad portfolios of work.
- c. The successful bidder must have the ability to work independently, superb written and verbal communications, and the ability to incorporate feedback and direction quickly.

3. Diversity and Inclusion Initiative

PHI is dedicated to promoting diversity in its procurement of goods and services. Pursuant to PHI's commitment to diversity, PHI encourages vendors that are certified as any of the following businesses:

- WOSB: Women-Owned Small Business
- SDVO: Service-Disabled Veteran-Owned Business
- HUBZone: Historically Underutilized Business Zone
- SDB: Small Disadvantaged Business
- 8(a)BD: African American, Asian Pacific American, Hispanic American, Native American, Subcontinent Asian American

E. Definitions and Examples

1. Case for Support Definition and Use
 - a. <http://www.afpnet.org/ResourceCenter/ArticleDetail.cfm?ItemNumber=3351>
2. Case Study/Samples of Case for Support:
 - a. <https://www.campbellcompany.com/news/compelling-case-for-support>
 - b. <http://cases.missionphilanthropy.org/>
 - c. http://feedingsouthflorida.org/wp-content/uploads/2014/08/Feeding_South_Florida_Overview_2014-1.pdf
 - d. <http://www.hoaghospitalfoundation.org/assets/files/Campaign-Case-Statement.pdf>