

## ANNOUNCEMENT

REQUEST FOR PROPOSAL (RFP)

### **SUSQUEHANNA NATIONAL HERITAGE AREA COMMUNICATIONS & MARKETING STRATEGY PROJECT**

Susquehanna National Heritage Area of Wrightsville, Pennsylvania is accepting proposals for a one-time contract to perform certain professional services work to help hone our messaging to visitors, partners, donors, and regional leaders. We seek a consultant to deliver a comprehensive communication and marketing strategy that aligns with our National Heritage Area Management Plan. Information is attached outlining requirements for proposal submission, evaluation criteria, and the proposed contract.

Proposals must be received by **Alene Wilmoth, Vice President of Finance and Operations** at **5989 Susquehanna Drive, Suite 102, York, PA 17402** or emailed directly to **awilmoth@susqnha.org** no later than **October 25, 2024**. If mailed, the proposal should be addressed to: **Susquehanna NHA c/o Alene Wilmoth**.

If additional information is needed, please contact Vice President of Finance and Operations, **Alene Wilmoth** at **(717) 252-0229 ext 104**, or Vice President of Visitor Engagement, **Hope Byers** at **(717) 252-0229 ext 105**.

A handwritten signature in black ink that reads "Hope Byers". The signature is written in a cursive style and is positioned above a horizontal line.

**Hope Byers**  
**VP of Visitor Engagement**

# REQUEST FOR PROPOSALS

## COMMUNICATIONS & MARKETING STRATEGY PROJECT

**Issued by:** Susquehanna National Heritage Area

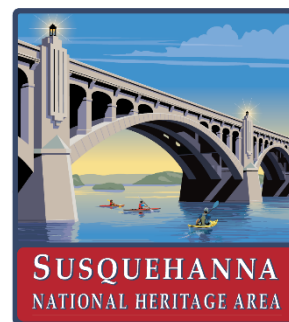
**Contact Person:** Alene Wilmoth

**Contact Email:** [awilmoth@susqnha.org](mailto:awilmoth@susqnha.org)

**Contact Phone:** 717-252-0229 ext 104

**Issue Date:** 9/23/2024

**Proposal Due Date:** 10/25/2024



### INTRODUCTION/BACKGROUND

Susquehanna National Heritage Area (SNHA) is a non-profit organization that connects the people and communities of Lancaster and York Counties to one another and to the nation through stories about this nationally important place. The National Heritage Area welcomes visitors, cultivates partnerships, and nurtures a strong regional identity. The two-county region is both state and federally recognized for its contributions to state and national history. SNHA completed a National Heritage Area Management Plan in 2023 that outlines our strategic priorities and responsibilities for the next decade.

SNHA is seeking proposals from qualified communication and marketing firms to help hone our messaging to visitors, partners, donors, and regional leaders. We seek a consultant to deliver a comprehensive communication and marketing strategy that aligns with our National Heritage Area Management Plan. That strategy will be used by the consultant team to develop a communications toolkit, branded templates, and logo design guide. Our goals are to clarify our brand identity, enhance digital ADA accessibility, expand DEIB initiatives, and support our mission through an effective communications strategy.

This project was financed in part with a grant from the Community Conservation Partnerships Program, the Heritage Areas Program Fund, and the Environmental Stewardship Fund under the administration of the Pennsylvania Department of Conservation and Natural Resources, Bureau of Recreation and Conservation. As such, all DCNR grant terms and conditions also apply to this contract. The Bureau has certain requirements and standards that must be met by SNHA and its contracted consultant. This Request for Proposal (RFP) has been prepared in accordance with Bureau requirements and standards. The Bureau will monitor the project and certain documents will be subject to Bureau review and approval. The DCNR Grant Agreement number is BRC-SR-27-17.

### GENERAL TERMS

- SNHA reserves the right to reject any or all proposals and to select the proposal that it determines to be in the best interest of SNHA.
- The contract is subject to the approval of the Board of Directors and is effective only upon their approval.
- Proposers are bound by the deadline and location requirements for submittals in response to this RFP as stated above.
- Proposals will remain effective for SNHA review and approval for 60 days from the deadline for submitting proposals.
- If only one proposal is received by the SNHA, it may negotiate with the proposer or seek additional proposals on an informal or formal basis during the 60-day period when the proposals are effective.
- The proposer is encouraged to add to, modify, or clarify any scope of work items it deems appropriate to develop a high-quality plan at the lowest possible cost. All changes should be identified with an explanation. However, the scope of work proposed must accomplish the goals and work stated below.

## SCOPE OF WORK

### A. Strategic Planning - Communication and Marketing

- Conduct a thorough analysis of our current communication and marketing efforts and thorough research to understand market trends, competitive landscape, and audience preferences.
- Analyze current social media and digital content efforts and make recommendations that will expand our base of supporters and strengthen donor engagement.
- Perform situation analysis using VRIO and 5C analysis methods to assess the organization and develop communication and marketing strategy.
- Create a comprehensive communication and marketing strategy that includes goals, target audience segments, key messages, channels, and tactics.
- Provide insights, language, and tools to optimize external communications to drive inclusion, dialogue, and engagement.
- Develop insights, language, and tools to optimize strategic messaging including creating an internal Communications Toolkit, including talking points, refined narrative, and elevator pitch.
- Provide a detailed social media content strategy and calendar for engaging with audiences on social media outlets.
- Develop a detailed implementation plan, including timelines, responsibilities, and resource/budget allocation.
- Define metrics for measuring the strategy's effectiveness and provide recommendations for ongoing evaluation and adjustment.
- Provide training and support to our internal team for strategy execution.

### B. Creative & Content Services

- Develop a brand architecture for Susquehanna National Heritage Area and its sub-brands including Zimmerman Center for Heritage, Columbia Crossing River Trails Center, Chief Uncas/River Discovery Boat Tours, and Susquehanna Discovery Center & Heritage Park.
- Enhance the SNHA logo portfolio to match the brand architecture.
- Updated visual identity guidelines such as color schemes and typography to be followed by our content development team.
- Create key messages and tone of voice for different audiences, languages, and platforms.
- Development of templates for letters, e-newsletters, press releases, and annual reports.
- Ensure the development of all content considers DEIB goals and digital accessibility recommendations.
- Provide a detailed plan for rolling out refreshed identity.

## REQUIRED SUBMITTALS

Proposals should include the following components:

- **Letter of Transmittal**
  - A statement demonstrating your understanding of the work to be performed.
  - A statement confirming that the firm meets the Consultant Qualifications (section above.)
  - The firm's contact person and telephone number.
- **Company/Team Profile**
  - A statement of the firm's experience in conducting work of the nature sought by this RFP; advertising brochures may be included in support of this statement.
  - The location of the firm's office that will perform the work.
  - Resumes of individuals (consultants, employees) proposed to conduct the work and the specific duties of each in relation to the work. DCNR requires that the project consulting team have the minimum qualifications outlined in Consultant Qualifications.
  - A reference list of other municipal clients of the firm with contact information.

- Any other information relating to the capabilities and expertise of the firm in doing comparable work.
- **Methodology:** The proposal must include a detailed description of the methods and procedures the firm will use to perform the work. Inclusion of examples of similar work is encouraged.
- **Work Schedule:** The schedule must include time frames for each major element, and dates for completion of draft and final documents. Note that the project must be completed by June 30, 2025.
- **Cost:** For each major work element, the costs must be itemized showing:
  - For each person assigned to the work, the title/rank (organizational level) of the person in the organization, the hourly rate, and the number of hours to be worked.
  - The reimbursable expenses to be claimed

The itemized costs must be totaled to produce a contract price. If awarded a contract, the proposer is bound by this price in performing the work. The contract price may not be exceeded unless the contract is amended to allow for additional costs. If awarded a contract, the firm may not change the staffing assigned to the project without approval by SNHA. However, approval will not be denied if the staff replacement is determined by SNHA to be of equal ability or experience to the predecessor. The method of billing must be stated. The preferred practice of SNHA is to pay upon completion of the work and receipt of the required report. However, SNHA will consider paying on a periodic basis as substantial portions of the work are completed. Regardless of the billing method used, a minimum of 10% of the DCNR Grant Award will be withheld until the final product is approved by DCNR and all project costs are paid in full.

- **Contract:** The contract form and DCNR “Nondiscrimination/Sexual Harassment Clause” is provided in Appendix A. DCNR requires that the “Nondiscrimination/Sexual Harassment Clause” be incorporated and/or attached to the contract in its entirety.

## EVALUATION CRITERIA

- **Technical Expertise and Experience:** The following factors will be considered:
  - The firm’s experience in performing similar work
  - The expertise and professional level of the individuals assigned to conduct the work
  - The clarity and completeness of the proposal and the firm’s demonstrated understanding of the work to be performed
- **Procedures and Methods:** The following factors will be considered:
  - The techniques for collecting and analyzing data
  - The sequence and relationships of major steps
  - The methods for managing the work to ensure timely and orderly completion
- **Cost:** The following factors will be considered:
  - The number of hours of work to be performed
  - The level of expertise of the individuals proposed to do the work.
  - Cost-effectiveness and value for money.
  - Within project budget of \$40,000.

## CONTRACT FOR PROFESSIONAL SERVICES

A proposed contract is included for review.

## **CONTRACT FOR PROFESSIONAL SERVICES COMMUNICATIONS & MARKETING STRATEGY PROJECT**

This Contract is made and entered into this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_, by and between the Susquehanna National Heritage Area ("SNHA") and \_\_\_\_\_ ("Consulting Firm"). This project was financed in part with a grant from the Community Conservation Partnerships Program, the Heritage Areas Program Fund, and the Environmental Stewardship Fund under the administration of the Pennsylvania Department of Conservation and Natural Resources, Bureau of Recreation and Conservation. As such, all DCNR grant terms and conditions also apply to this contract

WHEREAS, SNHA desires to have certain one-time professional consulting work performed to deliver a comprehensive communication and marketing strategy that aligns with our National Heritage Area Management Plan. That strategy will be used by the consultant team to develop a communications toolkit, branded templates, and logo design guide. Our goals are to clarify our brand identity, enhance digital ADA accessibility, expand DEIB initiatives, and support our mission through an effective communications strategy.

WHEREAS, SNHA desires to enter into a contract for this work pursuant to a Request for Proposals ("RFP") issued by SNHA

WHEREAS, the Consulting Firm desires to perform the work in accordance with the proposal it submitted in response to the RFP;

WHEREAS, the Consulting Firm is equipped and staffed to perform the work;

NOW, THEREFORE, the parties, intending to be legally bound, agree as follows:

### THE CONSULTING FIRM WILL:

- Provide professional consulting services in accordance with the RFP, its proposal in response to the RFP, and the Nondiscrimination/Sexual Harassment Clause, which is attached hereto and incorporated herein as Appendix A.
- Obtain approval from SNHA of any changes to the staffing stated in its proposal. However, approval will not be denied if the staff replacement is determined by SNHA to be of equal ability or experience to the predecessor.

### SNHA WILL:

- Compensate the Consulting Firm based on the actual hours worked and actual reimbursable expenses for a total amount not to exceed \$\_\_\_\_\_.
- Provide the Consulting Firm with reasonable access SNHA's personnel, facilities, and information necessary to properly perform the work required under this Contract.
- Except as provided in item 4 below, make payment to the Consulting Firm within 30 days after receipt of a properly prepared invoice for work satisfactorily performed.
- Make final payment of 10% of the funds available to the Consulting Firm under this Contract within 30 days after final product approval by the Department of Conservation and Natural Resources.

### IT IS FURTHER AGREED THAT:

- All copyright interests in work created under this Contract are solely and exclusively the property of SNHA. The work shall be considered work made for hire under copyright law; alternatively, if the work cannot be considered work made for hire, the Consulting Firm agrees to assign and, upon the creation of the work, expressly and automatically assigns all copyright interests in the work to SNHA.
- In the performance of services under this Contract, there shall be no violation of the right of privacy or infringement upon the copyright or any other proprietary right of any person or entity.
- The Consulting Firm may terminate this Contract at any time upon giving SNHA written notice of not less than 90 calendar days. SNHA may terminate this Contract at any time if the Consulting Firm violates the terms of this Contract or fails to produce a result that meets the specifications of this Contract. In the event of termination of this

Contract by either party, SNHA shall within 45 calendar days of termination pay the Consulting Firm for all services rendered by the Consulting Firm up to the date of termination, in accordance with the payment provisions of this Contract.

In witness thereof, the parties hereto have executed this Contract on the day and date set forth above.

FOR SNHA:

FOR THE CONSULTING FIRM:

\_\_\_\_\_

\_\_\_\_\_

TITLE: \_\_\_\_\_

TITLE: \_\_\_\_\_

### **APPENDIX A**

#### **NONDISCRIMINATION/SEXUAL HARASSMENT CLAUSE**

1. **Representations.** The Grantee represents that it is presently in compliance with and will remain in compliance with all applicable federal, state, and local laws, regulations, and policies relating to nondiscrimination and sexual harassment for the term of the agreement. The Grantee shall, upon request and within the time periods requested by the Commonwealth, furnish all necessary employment documents and records, including EEO-1 reports, and permit access to its books, records, and accounts by the Commonwealth for the purpose of ascertaining compliance with provisions of this Nondiscrimination/Sexual Harassment Clause.
  
2. **Nondiscrimination/Sexual Harassment Obligations.** The Grantee shall not:
  - a. in any manner discriminate in the hiring of any employee(s) for the performance of the activities required under this agreement or any subgrant agreement, contract, or subcontract, by reason of race, gender, creed, color, sexual orientation, gender identity or expression, or in violation of the Pennsylvania Human Relations Act (“PHRA”) and applicable federal laws, against any citizen of this Commonwealth who is qualified and available to perform the work to which the employment relates.
  
  - b. in any manner discriminate by reason of race, gender, creed, color, sexual orientation, gender identity or expression, or in violation of the PHRA and applicable federal laws, against or intimidate any of its employees.
  
  - c. in any manner discriminate by reason of race, gender, creed, color, sexual orientation, gender identity or expression, or in violation of the PHRA and applicable federal laws, in the provision of services under this agreement or any subgrant agreement, contract, or subcontract.
  
  - d. in any manner discriminate by reason of race, gender, creed, color, sexual orientation, gender identity or expression, or in violation of PHRA and applicable federal laws, against any subgrantee, contractor, subcontractor, or supplier who is qualified to perform the work to which this agreement relates.
  
  - e. in any manner discriminate against employees by reason of participation in or decision to refrain from participating in labor activities protected under the Public Employee Relations Act, Pennsylvania Labor Relations Act, or National Labor Relations Act, as applicable, and to the extent determined by entities charged with the Acts’ enforcement and shall comply with any provision of law establishing organizations as employees’ exclusive representatives.
  
3. **Establishment of Grantee Policy.** The Grantee shall establish and maintain a written nondiscrimination and sexual harassment policy that complies with the applicable law and these Nondiscrimination/Sexual Harassment provisions

and shall inform its employees in writing of the policy. The policy must contain a provision that states that sexual harassment will not be tolerated and employees who practice it will be disciplined. For the entire period of this agreement, the Grantee shall: (1) post its written nondiscrimination and sexual harassment policy or these Nondiscrimination/Sexual Harassment provisions conspicuously in easily accessible and well-lighted places customarily frequented by employees at or near where the grant activities are performed; or (2) provide electronic notice of the policy or this clause to its employees not less than annually.

4. **Notification of Violations.** The Grantee's obligations pursuant to these provisions are ongoing from the effective date and through the termination date of the agreement. Accordingly, the Grantee shall notify the Commonwealth if, at any time during the term of this agreement, it becomes aware of any actions or occurrences that would result in violation of these provisions.
5. **Cancellation or Termination of Agreement.** The Commonwealth may cancel or terminate this agreement and all money due or to become due under this agreement may be forfeited for a violation of the terms and conditions of these Nondiscrimination/Sexual Harassment provisions. In addition, the granting agency may proceed with debarment or suspension and may place the Grantee in the Contractor Responsibility File.
6. **Subgrant Agreements, Contracts, and Subcontracts.** The Grantee shall include these Nondiscrimination/Sexual Harassment provisions in its subgrant agreements, contracts, and subcontracts with all subgrantees, contractors, and subcontractors providing goods or services under this agreement. The incorporation of these provisions in the Grantor's subgrants, contracts, or subcontracts does not create privity of contract between the Commonwealth and any subgrantee, contractor, or subcontractor, and no third-party beneficiaries are created by those provisions. If the Grantee becomes aware of a subgrantee's, contractor's, or subcontractor's violation of these provisions, the Grantee shall use its best efforts to ensure the subgrantee's, contractor's, or subcontractor's compliance with these provisions.

**DCNR-2024-Gen  
Gen-GPM-1  
Rev. 1/2024**