



Request for Proposals

Design and Production of Community Action Council

Annual Reports for 2022

Proposal due DATE – October 14, 2022 at 5 p.m.

Community Action Council for Lexington-Fayette, Bourbon, Harrison, and Nicholas Counties, Inc. (CAC) is seeking a contractor to assist in the design and production of as many as four corporate reports for the agency and the agency's Head Start operations covering the corresponding fiscal and annual years 2021 -2023.

Offerors responding to this Request for Proposals (RFP) should have experience in marketing and/or public relations communications, designing and creating high-quality reports, with visual appeal and information graphics, for businesses and educational or other not-for-profit institutions.

Each report is to be prepared as a printable booklet in PDF format suitable for users to view online or download for printing. The actual printing and binding of the report are **not** a part of this project's scope of work.

The completed files must be delivered to CAC for final inspection and acceptance no later than:

- November 18, 2022, for the FY 2021-22 Head Start Annual Report (HSAR),
Possible future dates include:
- March 31, 2023 for the FY 2022 CAC annual report,
- October 13, 2023 for the FY 2022-23 Head Start Annual Report (HSAR), and
- March 31, 2024 for the FY 2023 annual report.

BACKGROUND

CAC is a private, non-profit organization that studies the causes and effects of poverty in our communities and works toward solutions. CAC addresses poverty in Central Kentucky through service delivery, community involvement, and advocacy.

CAC assists more than 31,000 individuals throughout Central Kentucky, providing various child development and school readiness services, economic and workforce development support, housing, safety net, and other services. is able to meet community needs due to the generous support of many funding sources ranging from the Federal and State governments to large foundations and individual businesses and donors.

WORK SCOPE

CAC seeks a vendor to design and produce print-ready versions of CAC's corporate reports for the agency and the agency's Head Start operations covering the corresponding fiscal and annual years 2021 -2023.

Each report shall include highlights, photographs, graphs, and success stories of CAC programs from the respective year. The report design must be professional and easy to read, and design elements should have visual appeal and flow throughout the document. Each report is to be produced as a "printable booklet" PDF file, downloadable from the CAC website. Examples of previous CAC-produced Annual Reports can be found online at:

<https://commaction.org/publications/>

This project is expected to involve the following elements:

- I. Required Content for the AGENCY annual report
 - A. Front and back covers
 - B. Up to 30 interior pages
 - C. Table of contents
 - D. Overview: Brief introductory written and visual matter, highlighting the mission, agenda, and accomplishments of CAC in support of our strategic plan.
 - E. List and a brief description of programs
 - F. Letter from the Director
 - G. Letter from the Board Chairperson
 - H. Board of Directors: the names and titles including their terms of office. The list will be segmented into public, private, and consumer sectors
 - I. Highlights: Eight to twelve longer narratives that underscore the value of CAC's work in the counties served
 - J. Financial Infographics: A two-page spread of statistical graphics or tables, with accompanying text and labels, providing a visual representation of the financial activities of CAC.
 - K. Corporate Officers: the names, photos, and job titles of CAC Senior Leadership Group.
 - L. Donor and grant award list

M. Awards: Names and descriptions of noteworthy industry awards made to the agency and staff during the Fiscal Year of the report.

II. Required Content for the Head Start annual report

- A. Front and back covers
- B. Up to 30 interior pages
- C. Table of contents
- D. Overview: Brief introductory written and visual matter, highlighting the mission of Head Start.
- E. The following Federal reporting requirements:
 - (1) Each Head Start agency shall make available to the public a report published at least once in each fiscal year that discloses the following information from the most recently concluded fiscal year, except that reporting such information shall not reveal personally identifiable information about an individual child or parent:
 - (a) The total amount of public and private funds received and the amount from each source.
 - (b) An explanation of budgetary expenditures and proposed budget for the fiscal year.
 - (c) The total number of children and families served, the average monthly enrollment (as a percentage of funded enrollment), and the percentage of eligible children served.
 - (d) The results of the most recent review by the Secretary and the financial audit.
 - (e) The percentage of enrolled children that received medical and dental exams.
 - (f) Information about parent involvement activities.
 - (g) The agency's efforts to prepare children for kindergarten.
 - (h) Any other information required by the Secretary.
- F. Infographic of programs, target population, and counties of operation.
- G. Letter from the Director
- H. Prep Academy statistics and financial infographics: Statistical graphics or tables, with accompanying text and labels, providing a visual representation of the financial activities of CAC and prep academy demographics.
- I. Head Start Policy Council, partner agencies, Board of Directors: the names and titles including their terms of office. The list will be segmented into public, private, and consumer sectors
- J. Highlights: Six to eight longer narratives that underscore the value of Head Start work in the counties served
- K. Awards: Names and descriptions of noteworthy industry awards made to

Head Start and staff during the reporting year.

III. Information Organization, Writing, and Editing

- A. Before beginning the development of the Fiscal Year annual report, the contractor will deliver to CAC, with maximum time allowed for comments and revisions, a detailed outline of the report structure and content organization.
- B. The contractor will be responsible for:
 - 1. writing certain portions of the report such as table of contents, descriptive text for infographics, credit and permission acknowledgments, legends, labels,
 - 2. designing and creating information graphics, CAC will provide the data to the contractor,
 - 3. designing and creating small (approximately 1/4-page) maps of CAC and Head Start service areas on which to display data that CAC provides to the contractor,
 - 4. editing and proofreading all text and data provided to the contractor by CAC, and
 - 5. provide creative suggestions on the *entire* annual report to create a well-written and well-organized document that reflects a logical flow of ideas and a compelling presentation of information.
- C. CAC will provide to the contractor:
 - 1. approved text for the CEO's Letter, Overview, and Highlights
 - 2. edited and titled written narratives
 - 3. full data sets (including descriptive text) for the information graphics that preface the Financials section
 - 4. still photographs and biographic information
 - 5. a list of corporate officers with job titles
 - 6. list of awards
- D. The contractor will collect, confirm or clarify information as needed from the designated CAC project manager by telephone or by email.
- E. Offerors responding to this RFP should describe how they propose to manage the iterative editorial process including tracking changes. Report data is expected to be converted into MS Word or other processing software after the PDF is finalized. Offerors should allow sufficient time for CAC's response to and approval of revisions of content.
- F. The contractor and CAC will exchange all verbal copy, other data, and audiovisual matter by email or other means of electronic data exchange or transfer. Upon request and with reasonable notice, the CAC project manager may arrange for a limited number of virtual meetings. Screen sharing capabilities are required.

IV. Graphic Design

A. The contractor will:

1. develop two (2) graphic design concepts for the annual report, incorporating color palettes, rough prototype cover designs, typographic design, rough page layouts, and order within the booklet for each of the principal content elements as noted above.
2. meet with CAC staff to present and review graphic design concepts and make as many as two revisions to one selected concept, and
3. deliver to CAC documentation of the final graphic design concept as comprehensive page layouts for an initial page and a subsequent page for each of the principal content elements.

B. The contractor will:

1. research visual images to be used in the report to supplement, as needed, CAC-supplied images with stock images. CAC will be responsible for the final image selection and pay for the cost of purchasing selected stock images or photo rights,
2. document and deliver to CAC written permissions, together with required credit language, for the use of all visual matter not created as a work for hire within the scope of this project,
3. edit and/or prepare 25-30 still images for use in the report,
4. secure — and deliver to CAC — licenses for the use of any typographic fonts, maps, diagrams, illustrations and other images to be used in the report.

V. Final Products

1. The contractor will deliver to CAC, for inspection and acceptance, for each annual report a single indexed PDF file of the “printable booklet” version (not to exceed 5 MB in file size and suitable for either downloading from a CAC website or emailing upon request), containing all pages, including front and back covers, CAC will not accept delivery of any materials that require it to assume or separately to acquire licenses for the use of any software or other intellectual property specifically for the Fiscal Year annual report.

PROJECT DELIVERABLES TIMELINE

The contractor will be required to provide the following deliverables for the 2021-22

HSAR in accordance with the timeline below. The deliverables must be of high quality as determined by CAC and at a minimum, conform to the specifications outlined in the Work Scope.

Deliverable	Due Date
Detailed outline of structure and content of report as well as production timeline	To be proposed by offeror
Documentation of final graphic design concept for printable booklet version – comprehensive page layouts	To be proposed by offeror
Initial report designed with content, data and photos for CAC review	To be proposed by offeror
Draft copy of 2021-22 Head Start report in printable PDF booklet format	TBD
Written documentation of all permissions for use of visual and graphic matter in report	TBD
Completed 2021-22 Head Start report in printable PDF booklet format	TBD

PROPOSAL SUBMISSION

Questions and proposals may be submitted to CAC’s Communications Manager via email at Patrice.muhammad@commaction.org.

REQUIRED PROPOSAL CONTENTS

I. Technical proposals

A MAXIMUM ONE to TWO PAGE proposal should address the offerors:

- A. demonstrated skill and experience in designing and producing similar high-quality reports with visual appeal including information graphics, including URLs or attached digital copies of PDF files for 1 or 2 printed or printable booklets completed recently
- B. plan for managing the project (and particularly the iterative creation, editing, revision and exchange of content and designs between CAC and the contractor), including a brief narrative describing an issue or obstacle that arose in any recent project, and how the offeror dealt with it, and
- C. proposed deadlines for delivery of intermediate project deliverables identified under the “PROJECT DELIVERABLES TIMELINE”, above.

II. Fee proposals

CAC contemplates entering an agreement with the chosen offeror providing for a

fixed fee covering all services and logistical expenses, including all travel expenses, typography, or other visual design elements in the creation of this CAC annual report.

Fee proposals, however, must also state the offeror's assumed or expected level of effort in terms of time (in hours) on the project for each of the principal personnel that an offeror proposes to assign to this project.

An all-inclusive fee and payment terms should be stated for the 2021-22 Head Start annual report, and for each of the three subsequent reports — for which CAC would have an option to renew the agreement.

CAC is tax-exempt. A certificate of exemption can be provided for approved purchases related to these projects.

EVALUATION CRITERIA

Proposals will be evaluated based on the following factors (with the weight of each factor expressed as a percentage):

- Skill and experience: as demonstrated in the quality of the offeror's examples of work in marketing and/or public relations communications as well as designing and producing products of recent work like this project (40 percent)
- Price: reasonableness of the price, both in total and in view of the expected or assumed level of effort (40 percent), and
- Project management plans: offeror's understanding of issues or problems that could arise and flexibility in anticipating how to forestall them or deal with them as they arise (20 percent).

CAC Terms

The closing date for responses to this RFP is October 14, 2022. Proposals submitted in response to this RFP by an applicant ("Offeror") shall be valid for at least 90 days following the closing date of proposals.

Proposals shall be prepared simply and economically, providing a straightforward, concise description of the Offeror's proposals to meet the requirements of this RFP. Neither multiple nor alternate proposals will be accepted.

CAC reserves the right to reject any and all proposals. However, CAC is committed to providing equal opportunity and all proposals will be considered without regard to race, color, ancestry, national origin, gender, gender identity, sex, sexual orientation, marital status, religion, age, disability, gender identity, results of genetic testing, service in the military or reprisal or retaliation for prior civil rights activity, or any other protected class identified in federal, state, or local laws.

By submitting an offer in response to this RFP, an Offeror, if selected for the award, shall be deemed to have accepted the terms of this RFP. Any exceptions to this RFP must be clearly identified in the proposal. A proposal that takes exception to these terms may be rejected.

Conditions of Agreement

If a proposal in response to this RFP is selected, Offerors will present a contractual agreement to CAC. Offerors are not authorized to commence work until the agreement is fully executed. If Offerors opt to commence work, they do so at their own risk. No oral or written statement other than the signed, written agreement will govern or modify the relationship.

As a condition of the agreement, Offerors must guarantee that, among other things, any work they undertake on behalf of CAC is not defamatory and will not violate or infringe upon the privacy rights, copyrights, or other proprietary rights of any third party. Offerors must also agree to indemnify CAC against any loss resulting from a breach of any of the guarantees contained in the agreement.

Requested by:

Melissa Tibbs, Director of Office of Sustainability

Name and Title

Melissa Tibbs 9/28/22
Signature and Date

Approved by:

Sharon Price, Executive Director

Name and Title

Sharon Price
Signature and Date