

AGENCY BRANDING AND COMMUNICATIONS PROJECT

Scope of Work

Introduction

The Regional Planning Commission (RPC) represents the New Orleans metropolitan area on matters of regional importance including transportation, economic development, and the environment. The RPC serves as the governing board of an eight-parish regional planning and development district serving Jefferson, Orleans, Plaquemines, St. Bernard, St. Charles, St. John the Baptist, St. Tammany, and Tangipahoa parishes. The RPC also functions as the metropolitan planning organization (MPO) for the federally designated metropolitan planning area consisting of the New Orleans, Slidell, Mandeville-Covington and South Tangipahoa urban areas. MPOs were created by Congress as a condition for spending federal highway or transit funds in urbanized areas and to ensure a cooperative, comprehensive, and continuing approach to transportation decision-making. Through the MPO process, the RPC is responsible for developing and managing the region's long-range transportation plan and short-range transportation improvement program.

In serving in its official capacity, the RPC must balance a multitude of interests across topical areas, while ensuring compliance with federal rules and regulations including but not limited to Titles 23 and 49 of the U.S. Code, Title VI of the Civil Rights Act, and the Americans with Disabilities Act. To better inform, communicate, and gather information from constituents the RPC must continuously work on updating outreach processes and refining its strategies and tools. To achieve optimal results, developing a comprehensive branding and messaging strategy encompassing all aspects of the agency and its duties is vital to ensure that quality outreach and engagement is being conducted. It is important that there is consistency in outward messaging and that the public and stakeholders have a clear understanding of the role and purpose of the RPC. The RPC seeks a qualified consultant to perform the tasks outlined in this scope of work. Qualified firms must demonstrate expertise with public issue communications and engagement campaigns. An advanced understanding of long-range urban and regional planning is preferred.

The primary objectives for this project are to:

1. Establish a centralized resource for creating and maintaining a uniform brand identity across various media utilized by the RPC.
2. Develop a visual design approach, or style guide, for public-facing material including color palettes, logos, icons, typography, etc.
3. Develop visual tools including but not limited to iconography, infographics, photography, aerial photography, illustrations, and renderings consistent with the developed brand identity.
4. Assemble a full branding toolkit that makes items produced by or for RPC consistent and easily identifiable including but not limited to templates (e.g., plans, reports, memos, presentations, social media posts, and web copy), promotional and engagement collateral (e.g., swag, posters, banners, and invitations), printed publications (e.g., event programs, booklets, brochures, flyers, one-pagers, reports), and other design assets as determined with RPC staff.
5. Develop a messaging strategy and key messages for public audiences including a narrative which describes the RPC, the roles and function of an MPO, the importance of regional planning, as well as more specific narratives to describe unique RPC programs and activities, differentiating the MPO functions from the other functions of the RPC.

6. Through training and workshopping, assist staff in adopting key messages ensuring a unified voice.
7. Develop content for outreach and engagement that is easily digestible for the general public and provides the public with real opportunities to be involved in planning processes.
8. Assist the RPC with printing and production of certain branded collateral products.
9. Develop outreach tools such as a “meeting-in-a-box” for standard or regular planning meetings such as for updates to the long-range plan, or for specific project or corridor studies.
10. Provide staff with tools to effectively manage stakeholders and build relationships.

Task 1 – Project Management and Schedule

The consultant will be responsible for the effective management of all activities described herein (Tasks 1-9) and for regular updates to the project manager on the development of deliverables. The consultant will organize a kickoff meeting with RPC staff within two (2) weeks of the consultant’s notice to proceed. At this time the selected consultant team and the RPC team will present and discuss the following.

1. **Overview of Project and Goals:** The consultant and RPC staff will review the project’s purpose, objectives and goals, and expected outcomes.
2. **Meeting Schedule:** The consultant will provide a tentative meeting schedule for regular check-ins with the project manager and identify the dates of workshops and trainings.
3. **Task Breakdown:** The consultant will present a list of all the tasks and activities required to complete the project, including both major milestones and smaller sub-tasks as well as resources required across different tasks to ensure project success. Tasks shall be organized in a logical sequence to ensure a smooth flow of work.
4. **Task Assignments:** The consultant shall assign responsibilities for each task to specific team members and clearly communicate roles and expectations for both the consultant and RPC for each task.
5. **Duration of Task:** For each task, the consultant shall note the estimated time required for its completion, along with the effort and resources needed from both consultant and RPC. This may include the number of work hours, team members involved, and external factors.
6. **Project Schedule:** The consultant will present a Gantt chart or visual representation of the project schedule, displaying the tasks, milestones, durations, and review periods. The schedule shall also include dates for the submission of final deliverables as well as project check-in meetings, workshops, and trainings.

Task 1 Deliverables:

- Briefing document detailing consultant’s understanding of project purpose, objectives, and outcomes
- Detailed task breakdown and project schedule with timeline and major milestones
- Monthly progress reports and invoices

Task 2 – Brand Audit/Assessment of Existing Marketing Materials

Working with the project manager and senior staff, the consultant will begin to collect information from each programmatic area within the RPC, review website content and analytics, review existing branding material and visual assets, review recurring plan and report documents, review outreach reports from past projects,

and assess current outreach policies outlined in the agency's Public Participation Plan. The consultant shall use this information to conduct a brand audit. The consultant will then conduct a SWOT analysis of the current brand perception and outreach performance, looking at strengths, weaknesses, opportunities, and threats, and identify areas for improvement.

Task 2 Deliverables:

- Detailed brand audit which inventories existing outreach, branding, and marketing material and practices (per RPC programmatic area), and analyzes their effectiveness as well as areas for improvement

Task 3 – Brand Discovery Activities

Task 3A: Brand Discovery Survey

The consultant will conduct a brand discovery survey for staff and, if possible, board members. The survey will inform the development of the messaging strategy and branding components. The survey should focus on assisting participants in brainstorming concepts such as RPC mission statements, core values and responsibilities, key words and concepts, definitions, and target audiences.

Task 3B: Brand Discovery Workshop

After distribution and completion of the brand discovery survey, the consultant will organize an in-person workshop for select participants as directed by the project manager. The purpose of the workshop will be to develop brand identity through the following activities outlined below. There should be a review of the messages and tactics RPC should keep, which RPC should change, and what new tactics and messaging might be necessary to achieve the agency's goals. The consultant shall develop workshop exercises and materials, including pre- and post-event communications. The consultant shall also integrate findings from Task 3A into the workshop.

1. **Mission, Vision, and Values:** Facilitate discussions to define or refine the agency's mission, vision, and core values/responsibilities. These foundational elements will guide brand development and messaging strategies.
2. **Stakeholder Analysis:** Discuss and define the target audience that the agency intends to reach and engage with its branded material, identifying key stakeholders and communities the agency serves and how (e.g., parish, municipal, general public). Understand their needs, preferences, behaviors, and pain-points to tailor the brand strategy accordingly. This will inform brand design decisions as well as communication/messaging strategies.
3. **Brand Personality and Tone of Voice:** Define the brand's personality traits and tone of voice (i.e., trustworthy, approachable, etc.). Determine how the brand should communicate with various audiences to establish a consistent and relatable identity.
4. **Visual Identity:** Discuss and brainstorm ideas for the brand's visual identity, including logo design, color palette, typography, and overall aesthetics. Ensure that the visual elements align with the brand's personality.
5. **Messaging:** Develop key messaging points that effectively convey the agency's value and resonate with target audiences. Define core brand messages for different communication channels, understanding the different dynamics and needs of different demographic and social groups.

6. **Integration and Implementation:** Discuss how the brand strategy will be integrated into various aspects of the organization, including outreach materials, website, social media, and internal communication.
7. **Visualizing Data:** Discuss data sets that the RPC commonly reports on and tracks and discuss opportunities to convey data through visuals and cartography. Define the messages these data should communicate to target audiences.

Task 3 Deliverables:

- Brand discovery survey
- Briefing document detailing results and findings of the brand discovery survey
- Pre-event communications materials
- Brand discovery workshop materials
- Post-event summary document with findings, emerging concepts, takeaways, and actionable steps

Task 4 – Initial Design Concepts

Building off the brand discovery activities, the consultant shall assemble initial design concepts for logos, icons, typography, color schemes for RPC program and core planning documents, templates, and any other concepts for infographics or data visualizations. The consultant shall present these concepts with alternatives to the project manager and senior staff for their approval to proceed with the subsequent Tasks 5-9. The consultant shall also provide a draft list with descriptions of each of the branding materials and templates which will be included in the branding toolkit per Task 5A as well as specify in which file formats each item will be delivered, subject to RPC staff approval. Finally, for this task, the consultant shall distinguish which branding collaterals will be printed in accordance with Task 9 of this scope of work, such as brochures, flyers, posters, banners, business cards, and any other promotional items.

Task 4 Deliverables:

- Document outlining the strategic design approach and initial design concepts, branding toolkit components, and proposed print collaterals

Task 5 – Develop Final Branding Materials

Task 5 involves the development of all branded materials including a branding toolkit, style guide, and other visual tools. Branding materials shall ensure a uniform brand identity aligned with the agency's purpose and principles. Brand assets should be flexible and extensible for a variety of internal and external uses as well as for multiple initiatives.

Task 5A: Branding Toolkit

The branding toolkit should encompass the final versions of all branded materials and products including the following items listed below, as well as any additional material as discussed during the concept development process. Prior to assembling the final toolkit, the consultant shall undertake a proofing and quality control process including reviewing digital proofs and creating physical samples of all collateral intended for print. The consultant shall ensure that final products meet the desired standard and with the approval of the RPC project manager, shall proceed to develop the toolkit with the following components:

1. **Logo.** The consultant shall provide versions in color, grayscale, and black and white. The consultant shall define the colors for different models and formats, including Pantone, CMYK, HEX, and RGB values. File formats shall include PNG, EPS, AI, and JPG.
2. **Infographics:** As a means to make information more accessible to the public, the toolkit shall include a compilation of infographics which explain common regional concepts and trends. The infographics and other data visualization tools should be submitted in editable formats, which can be modified over time as new data becomes available.
3. **Photography, Stock Images, Aerials:** The toolkit should include a suite of aerial images of key landmarks or transportation assets in the region, at least five (5) images per parish. In addition, the toolkit should include a library of images taken within the region which convey the work of RPC programs, at minimum 100 images. Subject to copyright law, all images shall be photographed by the consultant for RPC ownership.
4. **Iconography:** The toolkit shall include an icon package consisting of at least 30 separate vector icons.
5. **Illustrations and Renderings:** The toolkit shall include illustrations or renderings to assist in describing common RPC work program elements.
6. **Templates:** The consultant will design several template items in multiple editable formats as approved by the RPC staff. Templates may include PowerPoint presentations (with title slides, agenda slides, content slides, thematic slides, etc.), Excel spreadsheets and tables, standard reporting templates or memos, stage zero report templates, letterhead, E-newsletter headers and footers, informational one-pagers, event one-pagers, email signatures, social media posts, project webpages, and others as decided during the concept phase per Task 4.
7. **Promotional Swag:** The toolkit shall include designs of various promotional swag items to use for engagement.
8. **Brochures and Flyers:** The toolkit should include visually appealing brochures and flyers that convey key messages and explain the work of the RPC. These materials should be easy to distribute and share at public events, community centers, and online platforms.
9. **Posters and Banners:** The toolkit shall include designs of posters and banners (wall mounted and retractable) for use at public engagement events.

Task 5B: Style Guide

The style guide shall encompass a comprehensive set of branding guidelines or specifications that dictate how all brand elements (e.g., logo, color scheme and palette, typography, etc.) should be used across various channels, such as websites, social media, print materials, presentations, reports, and others. This ensures uniformity and coherence in communications. The guidelines should cover legal and copyright considerations, ensuring that all published and printed materials comply with copyright laws and any other legal requirements. Printed material shall also meet accessibility standards complying with the code of federal regulation ADA requirements.

The style guide should also provide guidance for online presence, including website design integration, social media profile templates for project-based pages, and content creation guidelines. Finally, the guide should also contain specific guidance for ordering and printing special materials such as brochures, posters, booklets, or other promotional items, including print specifications (e.g., recommended paper type, weight, finishing, printing technique, colors, and binding), and budgets and cost estimates for varying alternatives.

Task 5 Deliverables:

- Physical proofs of all printed materials
- Full branding toolkit
- Style guidelines

Task 6 – Develop Messaging Strategy

Task 6 should be carried out in conjunction with Task 5 detailed above. The consultant will develop an agency-wide messaging strategy/plan that integrates the insights and recommendations that came from the brand discovery activities. The goals of the messaging strategy should also include assisting the agency in building trust, better relationships, more public buy-in, and an improved public perception of the benefits and limitations of the regional organization. The messaging strategy shall incorporate the following elements described below.

1. **Mission and Vision:** Clearly articulate the agency’s mission and vision in concise and compelling language. These statements should reflect the agency’s purpose and long-term goals.
2. **Core Values and Responsibilities:** Identify and communicate the agency’s core values and responsibilities that guide its decision-making and planning efforts. These values should resonate with the community and stakeholders. They should also help distinguish the RPC from other governmental agencies (e.g., the RTA or specific parish and city governments).
3. **Elevator Pitch:** Develop a succinct elevator pitch that provides a quick overview of the agency’s purpose, key initiatives, and benefits to the community.
4. **Target Audience Segmentation:** Identify the key stakeholders and communities the agency serves and how. Tailor messages to address the specific needs and interests of different target audiences, such as residents, businesses, government officials, and community organizations.
5. **Key Messages:** Define a set of key messages that highlight the agency’s unique value proposition, expertise, and the positive impact of its planning initiatives on the community.
6. **Consistency across Channels:** Ensure that messaging remains consistent across all communication channels, including the website, social media, public meetings, press releases, and outreach materials. Provide recommended web copy to incorporate messaging on the RPCs website.
7. **Language and Tone:** Determine the appropriate language and tone of voice for the agency’s messages, aligning with the brand identity and the preferences of the target audience.
8. **Addressing Complex Issues:** Develop simple and accessible messaging for complex planning issues, using clear language and visual aids, such as infographics and illustrations, to enhance understanding.
9. **Inclusivity and Diversity:** Emphasize the agency’s commitment to inclusivity and diversity in its planning approach, making sure messaging reflects different perspectives and community needs.
10. **Adaptable Messaging:** Create messaging that can be adapted for various communication channels and formats, such as social media posts, press releases, website content, and public presentations.

Task 6 Deliverables:

- Messaging strategy document
- Document outlining recommended web copy to integrate within the RPC’s website

Task 7 – Develop Supplemental Outreach Materials

Following completion of the branding toolkit and messaging strategy, the consultant shall be tasked with creating the following specific outreach materials to assist RPC in its engagement efforts with stakeholders (e.g., tabling at events, workshops, open houses, public forums). Task 7 deliverables shall be printed and produced as part of Task 9.

1. **Fact Sheets/Brochures:** Create concise and informative fact sheets or brochures that highlight the RPC’s mission, programs, policies, general regional planning concepts, and general regional information and trends. These sheets can be used to provide quick and essential information to the public and stakeholders.
2. **Educational Presentations:** Create educational presentations for schools, community groups, and other organizations. These presentations can be used to raise awareness about urban planning, urban design, engineering, sustainability, and the agency’s role in shaping the region's future.
3. **Translation and Accessibility:** Ensure that outreach materials are available in multiple languages and formats to reach a diverse audience and comply with accessibility standards.
4. **Meeting-In-A-Box:** Assemble a checklist and guide for staff including directions for conducting a standard outreach meeting with all necessary outreach materials.

Task 7 Deliverables:

- Digital copies of the fact sheets, brochures, and educational presentations, and a digital copy of the components of the “meeting-in-a-box” with note of the items needed for printing or production

Task 8 – Staff Training

The consultant shall plan and host a training with RPC on the use of the branding materials including the branding toolkit, style guide, and supplemental outreach items. The consultant shall also train the RPC in the delivery of the messaging strategy.

Task 8 Deliverables:

- Training agenda, presentation, and exercises

Task 9 – Print Production

After identifying which branding collateral will be printed in mass according to Task 4 (i.e., brochures, flyers, posters, banners, booklets, and other promotional items), the consultant will work with the RPC project manager to determine the required quantity of each printed item, and the desired size based on anticipated demand, distribution, and budget. All printed material shall comply with copyright laws and meet accessibility standards complying with the code of federal regulation’s ADA requirements. Prior to finalizing an order, the consultant shall follow the steps outlined below.

1. **Print Specifications:** In a memo subject to the approval of the project manager, the consultant shall specify the technical details for each printed item, such as paper type, weight, finishing, printing technique, colors, and binding.
2. **Budget and Timeline:** In a memo subject to the approval of the project manager, the consultant shall outline a budget for the printing project and timeline for proofing, printing, and delivery. The consultant shall ensure that the timeline aligns with any upcoming outreach initiatives.

3. **Proofing:** The consultant shall undergo a proofing process to ensure accuracy and quality before mass production. This should include reviewing digital proofs and creating physical samples for RPC approval.
4. **Quality Control:** In a memo subject to the approval of the project manager, the consultant shall outline the quality control measures to be implemented during the printing process to ensure that final products meet the desired standard.
5. **Vendor Selection:** If the consultant outsources the printing job, they shall conduct research and select a reliable printer vendor capable of delivering the required quality within a specified timeline and budget. The vendor selected must also be available to execute a contract with the RPC for future printing needs.
6. **Distribution and Delivery:** The consultant shall plan for the distribution and delivery of printed materials considering shipping costs and delivery timeline.

Task 9 Deliverables:

- Memo outlining printing specifications, budget and timeline, quality control, vendor selection, and distribution and delivery plan
- Physical proofs of all material
- Final printed branded material

Timeline

Not to exceed eight (8) months