



## Request for Proposals

### Consultant Services: Brand Refresh for Casco Bay Estuary Partnership

Issue Date: July 18, 2024

Last Day to Submit: Friday, August 16, 2024, 5:00 p.m.

### Summary

[Casco Bay Estuary Partnership](#) (CBEP) seeks proposals from experienced branding agencies to help us complete a brand “refresh” that will position us as a forward-thinking, inclusive conservation organization. The purpose of this brand refresh is to update our brand identity with the aim of increasing public awareness of the Partnership, reaching new audiences, and strengthening CBEP’s role as a communications hub. We are looking for an agency to update our brand’s look and feel so that it accurately reflects our organization’s mission, vision, and values, and meets the needs and expectations of our target audiences.

### Introduction

For three decades, the Casco Bay Estuary Partnership (CBEP) has guided efforts to sustain a healthy Bay and watershed: protecting key habitats, improving water quality, and encouraging sound stewardship.

CBEP brings together dozens of organizations and individuals in a collaborative network on behalf of Casco Bay. The Partnership’s core staff, housed at the Catherine Cutler Institute at the University of Southern Maine (USM), strives to anchor the network, strengthening the effectiveness of all members of the Partnership on behalf of Casco Bay, the watershed, and the people of the region. The organization is science-based, watershed focused, and collaborative. Be sure and read about our work on our [website](http://cascobayestuary.org): [cascobayestuary.org](http://cascobayestuary.org).

CBEP is one of twenty-eight national estuary programs around the country. The National Estuary Program (NEP) was created by Congress under Section 320 of the Clean Water Act, as part of the 1987 Clean Water Act Amendments, and is administered by the U.S. Environmental Protection Agency (EPA). The program establishes locally led, non-regulatory, collaborative programs to protect and restore the water quality and ecological integrity of Estuaries of National Significance. EPA continues to oversee CBEP’s work and is among the organization’s most important funders.

CBEP completed its last brand update over a decade ago. Major components of the CBEP brand, such as our logo, have not been refreshed in almost 20 years. Over that time, communications practices have changed, and our mission has evolved. We recently completed an [updated strategic plan, the Casco Bay Plan](#).

During the strategic plan update, CBEP staff and our Management Committee (which helps set CBEP priorities in a manner similar to a traditional nonprofit Board) identified the need to review and update the CBEP brand, branding materials and communications practices, to reflect our current identity and to support implementation of the updated Casco Bay Plan. We recognized three community engagement and communications needs that we could address in part via changes to our brand, branding materials, and communications practices. These include:

1. **Broadening our reach**, building new collaborations, and engaging new partners;
2. **Helping towns and communities** throughout the Casco Bay watershed address climate resilience and water quality challenges; and
3. **Strengthening our identity as a Partnership**, working together across multiple organizations and institutions to achieve shared goals on behalf of Casco Bay.

On the surface, the branding exercise will update the look of CBEP outreach and communications materials. But on a deeper level, the exercise will craft a relatable, compelling story that expresses who we are. The updated story will express CBEP's purpose and values and support efforts to engage new target audiences.

## Present-day Brand Challenges

- Our key audiences have expanded – our brand should evolve to better connect with new and expanded audiences, including underserved and underrepresented audiences.
- Our new Strategic Plan and increased (for now) federal funding has shifted the focus of our work. A refreshed brand should reflect our growing efforts assisting local communities with climate resilience (and other water-related challenges) through grants and technical assistance.
- CBEP's identity overlaps with other organizations with whom we work, such as Friends of Casco Bay and the Gulf of Maine Research Institute. While we are not competing with these partner organizations, our brand should clearly communicate who we are and what we do best.
- An ongoing challenge is to make sure our brand strengthens the work and messaging efforts of our partners.

## Target Audiences

CBEP historically viewed its role principally as a convenor and coordinator of groups and individuals engaged with work on water quality and coastal habitat. We intended for our brand to reach individuals and organizations (such as municipal government, federal and state agencies, and nonprofit organizations) with an existing, usually professional connection to our work.

Our target audiences are expanding as we seek to provide services and assistance to more people and communities, including inland communities and underserved populations. The impact of climate change on Maine communities has become increasingly evident. The January 2024 storms caused tens of millions of dollars' worth of damage to coastal communities. To be successful in the

context of climate change and rising seas, CBEP must broaden our circle of communication, and increase our visibility to and relationships with priority audiences including, but not limited to:

- small rural community municipal staff and volunteers;
- natural resource industry businesses and workers (like those in agriculture, forestry, and fishing);
- people with disabilities;
- New Mainers/immigrants;
- indigenous peoples; and
- people of color.

A key approach to increasing CBEP's circle of engagement will be to strengthen connections with organizations that already work with these target communities in intersecting disciplines, like housing, public health, social justice, and workforce development. Thus, these organizations are themselves also a potential new audience for CBEP outreach and communications.

## Scope of Work

### Core Services:

The following services and deliverables are **REQUIRED** as part of the project:

#### Required Tasks

- Initial Project kick-off meeting with CBEP staff
- Gather Background Information
- A minimum of two presentations / discussion of brand / branding ideas with CBEP Management Committee and /or Executive Committee. CBEP's Management Committee meets quarterly, in September, December, March and June. Our Executive Committee meets monthly.

#### Required Deliverables

- Updated Brand Statement
- Rebranding strategy: Consistent brand messaging that can work across different audiences, which may include updated tag lines
- Logo redesign: An updated logo and visual identity framework that reflects CBEP values and will help us connect with target audiences
- Brand book and style guide:
  - A set of brand guidelines (such as fonts, colors, taglines, etc.) that can be applied by staff and external designers across different mediums, including digital and print media. Ensure accessibility regarding color/contrast, font selection, and readability.
  - A suite of tools to support brand consistency and reflect brand identity and messaging, including design templates for key outreach pieces such as letterhead, email, slide decks (PowerPoint and Google Suite), fact sheets and event fliers (Canva), E-news (MailChimp), and white papers and working reports.
- A launch plan that outlines the key steps and timelines for rolling out the new brand to both internal and external audiences

## Additional Services

We invite applicants to include in their proposals a description of their approach to, and estimated cost of conducting an **OPTIONAL** brand audit. CBEP will decide whether to request this additional service as an add-on to the contract based on cost, value, schedule, and available resources. This additional service may include interviewing or meeting with CBEP partners and external audiences, but our federal funding imposes strict limits on use of surveys. (Description of this optional add-on will not be counted against the page limits described below).

## Timeline

• RFP issued	July 18
• Last day to submit questions	Friday, August 2
• All questions answered	Friday, August 9
• All proposals due	Friday, August 16 (5 pm)
• Chosen firm notified	Week of August 26 / Seek of September 1
• Interviews conducted	Week of September 3
• Approximate project start date:	September 15
• Approximate project end date:	January 31, 2025

## Proposal

Each proposal responding to this RFP should include the following components:

### Narrative

- Description of a proposed process and key steps to conduct a brand refresh and produce required outputs;
- Proposed timeline, taking into account potential dates for meeting with CBEP's Management Committee and Executive Committee;
- The Narrative section, including timeline, should be under ten pages.

### Qualifications

- Summarize qualifications of the firm (no more than two pages)
- Describe related experience and qualifications of key personnel (Please be concise. We prefer a narrative paragraph or one page resume for each person, but this section may take an alternative form convenient for the bidder).
- Provide examples/descriptions or links to at least two examples of prior branding work;
- List names and contact information for at least two professional references (prior branding clients if possible).

### Budget

- The project budget should include a clear cost breakdown, including hourly rates, estimated time and cost for each step or task, any additional costs such as travel, and estimated total cost.
- Bids for the required components should not exceed \$30,000. Cost will be one, but not the only basis on which we evaluate proposals.

## Submittal Requirements

Proposals must be received by no later than 5:00 p.m. on August 16<sup>th</sup>, 2024, and be emailed to Casco Bay Estuary Partnership at [natalie.bingham@maine.edu](mailto:natalie.bingham@maine.edu).

Address questions regarding this Request for Proposals to: Victoria Boundy, [victoria.boundy@maine.edu](mailto:victoria.boundy@maine.edu).

## Selection Criteria

CBEP will evaluate written proposals based on the following criteria based on the proposal components above:

Narrative: The proposed approach to conducting the brand refresh	40%
Qualifications and related experience of the firm and key staff	30%
Budget: Overall cost and cost effectiveness of the proposal	20%

Following evaluation of written proposals, CBEP staff will meet with top candidates before making a final decision awarding the contract.

## Follow-Up Process

A subcontract agreement will be entered into between the University of Maine System and the successful bidder, on behalf of Casco Bay Estuary Partnership, prior to work commencing. The successful contractor will be required to enroll as a supplier in the University of Maine eProcurement system, Maine Street Marketplace, and provide a Certificate of Insurance as specified in the subcontract.

Timing of payments will be tied to the project timeline. Invoices should be submitted after each task or key milestones (no more often than monthly and no less often than quarterly).

## Equal Opportunity Statement

The University is committed to providing increased access and opportunity to diverse businesses include and not limited to: Lesbian, Gay, Bisexual and Transgender Business Enterprise (LGBTQ+BE); Minority Business Enterprise (MBE); Service-Disabled Veteran Business Enterprise (SDVBE); Small Business Enterprise (SBE); veteran-owned; service-disabled veteran-owned; HUBZone; small disadvantaged business; women-owned; minority-owned; Veteran Business Enterprise (VBE); and Women’s Business Enterprise (WBE).