



POTLATCH FUND

Request for Proposals - 2023

Annual Report Design and Production

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Section I – Summary

Potlatch Fund seeks proposals for the graphic design and production of web-based and print versions of its 2022 Annual Report.

To respond to this Request for Proposals (RFP), an interested company should submit its proposal electronically (in Adobe Acrobat PDF file format) to the Communications Team:

Potlatch Fund Communications Team - info@potlatchfund.org ATTN: KP

Proposals must be submitted and received by Friday March 3, 2023 by 5pm PT.

Proposals must address all information requested in this RFP. A proposal may add information not requested in this RFP, but the information should be in addition to, not instead of, the requested information and format. Any questions regarding this RFP should be submitted via email.

Section II – Background

A. Potlatch Fund Overview

Potlatch Fund is a Native-led nonprofit organization that provides grants and leadership development to Tribal Nations in Washington, Oregon, Idaho and Montana.

Mission

Celebrating Native communities through the cultural tradition of giving.

Vision

Envisioning the future of our ancestors' dreams.

Values

Reciprocity. When we give, we all receive.

Generosity. We measure wealth not in possessions but in shared abundance.

Honor. We celebrate all our relations.

Culture. We uplift cultural traditions and Native ways of life.

B. Annual Report Design and Production

Potlatch Fund prepares an Annual Report publication that contains a year-end review of the past year's projects, stories from our community of grantees and a summary of annual statistics. It will also include narratives of each function of the organization. The document is normally around 30 pages in length and may include photographs, charts and graphics that help tell Potlatch Fund's story for the preceding year. The publication shares the work that Potlatch Fund does and so strong visual elements are important to best convey our messaging.

Samples of past annual reports can be viewed on our website here:

<https://www.potlatchfund.org/about/reports-resources/>

Potlatch Fund is interested in exploring new approaches to presenting the annual summary information. Potlatch Fund's goal is that the Annual Report be accessible not only to our community but also to the general public, funders, local governments and elected officials. The document shall be developed so that it can be presented in hardcopy format as well as a web-based version accessible on desktop and mobile devices. Potlatch Fund strives to have its Annual Report stand out from traditional reports through creative design elements and storytelling. The project requires innovative design that is professional, readable and aesthetically pleasing.

Section III – Scope of Work

The selected creator will provide the graphic design and production of the printed and digital (desktop and mobile) versions of Potlatch Fund's 2022 Annual Report. The selected creator will be responsible for the discovery, creative design, development and delivery of the Annual Report. Bidders should include their process for discovery and concept development in their proposals.

Artwork and Production:

In addition to the text, the Annual Report may include maps, charts, graphs, tables or other recommended visual displays of information. It may require design of artwork and photo manipulation. The content shall be provided by Potlatch Fund and artwork will be produced by the creator.

Photography and Video:

Creators will be responsible for providing any stock photographs. Photographs and videos unique to Potlatch Fund's work will be provided by Potlatch Fund.

Print and Distribution:

The Annual Report will be printed in professional multi-color printing and up to 500 hard copies of the final publication will be distributed.

Timeline:

The Annual Report shall be completed, printed and delivered to Potlatch Fund on or before May 15, 2023. The web-based version, to be hosted on Potlatch Fund's website at www.potlatchfund.org, shall be delivered to the Potlatch Fund communications team at least 1 week in advance of the launch date of May 15, 2023. Editing requests will be fulfilled in total before the due date.

Section IV – Instructions to Bidders

A. General

1. Interested creators must submit questions and bid documents via email to info@potlatchfund.org
2. All proposals must be made in accordance with the conditions of this RFP. Failure to address any of the requirements is grounds for rejection of this proposal.
3. All information should be complete, specific, and as concise as possible.
4. Proposals should include any additional information that the respondent deems pertinent to the understanding and evaluation of the bid.
5. Potlatch Fund may modify the RFP or issue supplementary information or guidelines during the proposal preparation period prior to the due date. Communication will be submitted through email.
6. Potlatch Fund reserves the right to reject any and all proposals.
7. Potlatch Fund's budget for this project is not to exceed \$8000 (inclusive of the printing of the reports). This budget is in alignment with past Annual Report project costs.
8. Creator is responsible for any subcontracting and/or outsourcing of printing.
9. All questions must be in written form and submitted via email no later than 5pm PT on Wednesday February 24, 2023.
10. The cost for developing the proposal is the responsibility of the bidder, and shall not be chargeable to Potlatch Fund.

B. Submittal of Proposals

1. Due Date – All proposals are due no later than 5pm PT, March 3, 2023, and should be submitted via email to: Potlatch Fund Communications Team – info@potlatchfund.org - ATTN KP
2. You may send google doc links, attachments via email, or other web hosting links that are easily viewable and downloadable.
3. Signature – All proposals should be signed by an authorized representative of the bidder.
4. Submittal – Submit proposals via email. Late proposals will not be accepted. Any correction or re-submission of proposals will not extend the submittal due date.
5. Grounds for Rejection – A proposal may be rejected at any time if it arrives after the deadline, is not in the prescribed format, or is not signed by an individual authorized to represent the creator.
6. Modification – Once submitted, proposals, including the composition of the contracting team, may be altered up until the due date. Proposals may not be modified after the due date.

C. Interviews

1. Potlatch Fund, at its option, may interview bidders. The interviews will be for the purpose of clarifying the proposals.
2. Submittal of new proposal material at an interview will not be permitted.

3. Interviews may involve a presentation and/or a question-and-answer session.

Section V – Proposal Format, Content and Submittal

A. Contents of Proposal

Submitted proposals must follow the format outlined below and include all requested information. Failure to submit proposals in the required format can result in the proposal being eliminated from evaluation and consideration.

1. Technical Proposal

- a. Cover Letter (Section I) – Must include the name, address, and telephone number of the company, and must be signed by the person(s) authorized to represent the creator.
- b. Firm Contact Information – Provide the following information about the creator:
 - Address and telephone number of office nearest to San Francisco, California and the address and phone number of the office that each of the proposed staff members are based out of if different.
 - Name of creator’s representative designated as the contact and email address
 - Name of project manager, if different from the individual designated as the contact
- c. Table of Contents – Clearly identify material contained in the proposal by section
- d. Summary (Section II) – State overall approach to the Annual Report Design and Production, including the objectives and scope of work.
- e. Program Schedule (Section III) – Provide projected milestones or benchmarks for completing the project within the total time allowed. Include a timeline that demonstrates the creator’s ability to meet the May 15, 2023 completion deadline.
- f. Creator Organization (Section IV) – Provide a statement of your background and related experience in providing similar services to governmental organizations, if any. Describe your technical capabilities and, in particular, your experience with working with Native-led organizations and communities, if any. Provide references of other, similar projects including contact name, title, and telephone number for all references listed.
- g. Project Organization (Section V) – Describe the proposed management structure, program monitoring procedures, and organization of the engagement team. Provide a statement detailing your approach to the project, specifically addressing your ability and willingness to commit and maintain staffing to successfully conclude the project on the proposed schedule.
- h. Assigned Personnel (Section VI) – Provide the following information about the staff to be assigned to the project:
 - List all key personnel assigned to the project by level and name. Provide a description of their background, along with a summary of their experience in providing similar services for governmental agencies, and any specialized expertise they may have. Background descriptions can be a resume, CV, or summary sheet. Substitution of project manager or staff will not be permitted without prior written approval of Potlatch Fund’s assigned program manager.
 - Provide a statement of the availability of staff in any local office with requisite qualifications and experience to conduct the requested project.
 - Provide a statement of education and training programs provided to, or required of, the staff identified for participation in the project. Make particular mention of with reference to experience dealing with governmental agencies, procedures, and environmental regulations.

- i. Retention of Working Papers (Section VII) – All working papers are the property of Potlatch Fund. Include a statement acknowledging that if your firm is awarded the contract, you will retain project related papers and related reports for a minimum of five (5) years.
- j. Subcontractors (Section VIII) – List any subcontractors that will be used, the work to be performed by them, and the total number of hours or percentage of time they will spend on the contract.
- k. Conflict of Interest (Section IX) – Address possible conflicts of interest with other clients affected by contractors’ actions performed by the firm on behalf of Potlatch Fund. Potlatch Fund recognizes that prospective bidders may have contracts to perform similar services for other clients. Include a complete list of such clients for the past three (3) years with the type of work performed and the total number of years performing such tasks for each client. Potlatch Fund reserves the right to consider the nature and extent of such work in evaluating the proposal.
- l. Additional Data (Section X) – Provide other essential data that may assist in the evaluation of the proposal.
- m. Work Samples (Section XI) – Include 3 samples of print and 3 samples of web-based annual report projects designed and completed by the firm. Include the client, the name of a contact person who is able to provide a reference, a description of the nature of the work, and the size and complexity of the project.

2. Cost Proposal

- a. Name and Address – The Cost Proposal must have the name and complete address of the bidder in the upper, left-hand corner.
- b. Cost Proposal – The Cost Proposal must list the fully-burdened hourly rates and the total number of hours estimated for each level of professional and administrative staff to be used to perform the tasks required by this RFP. In addition, Cost Proposals should include the cost of professional printing and distribution of the final publication.
- c. The Cost Proposal does not need to be a separate, sealed document.

Section VI – Proposal Evaluation

A panel of Potlatch Fund staff will evaluate all proposals. The panel will recommend the selection of the contractor to the Communications Team, who will, in turn, make a recommendation to the Potlatch Fund Board of Directors. The Potlatch Fund Board of Directors may be required to approve the contract to carry out the work described in this RFP.

Proposals will be evaluated on the following criteria:

Criteria	Description	Weight
Expertise	Technical expertise, capacity and structure of the creator and personnel assigned to RFP tasks; creator’s ability to perform and complete the work in a professional and timely manner.	25%
Skill	Past experience of the creator and, in particular, experience of the team working on projects of similar scope for other governmental agencies.	25%
Approach	Responsiveness of the proposal, based upon a clear understanding of the work to be performed.	10%

Cost	Cost or cost effectiveness and resource allocation strategy	30%
References	References of the firm	5%
Creator's Specialty Focus Area	Native-owned, Woman-owned, Minority-owned, Local business, or Green business	5%
	Total	100%

Section VII – Schedule

<i>Milestone</i>	<i>Date</i>
RFP Release Date	February 17, 2023
Questions Due Date	February 24, 2023 5pm PT
Proposal Submission Due Date	March 3, 2023 5pm PT
Selection of Finalist	March 9, 2023 5pm PT
Commencement of Contract	March 13, 2023 5pm PT
Project Deadline	May 15, 2023

*Dates are tentative and subject to change