




ARAPAHOE COUNTY

Strategic Consulting Services

RFP # 23-65

Submitted by:

 **Blakely+Company**

November 21, 2023



Blakely+Company

November 20, 2023

Arapahoe County Finance Department
Purchasing Division
5334 S. Prince St., Room 480
Littleton, CO 80120

Blakely + Company is a full-service communications firm with extensive expertise in public affairs consulting and political campaign management. I founded the agency in 2001 and have been in Colorado since 1991. Our partner on this project is Vitale & Associates, a strategic research firm based on Denver.

Over the past two years our firms have worked on three similar projects, including evaluating potential ballot issues and implementing strategic communications plans for the City of Cherry Hills Village, City of Castle Pines and Academy District 20, the largest school district in the Pikes Peak region.

In addition to these three recent projects, I have worked on more than 60 political campaigns, many of which have been in Colorado Springs and El Paso County, the fourth most conservative county in the United States and the home of the Tax Payers' Bill of Rights (TABOR). I have worked on and passed several tax issues in this county.

Why is that important? Having a consultant and team that has had success passing tax initiatives in conservative communities is valuable as you undertake this process.

Two of the issues I have helped pass in Colorado Springs are one of our road taxes, the Pikes Peak Rural Transportation (PPRTA) and our Trails, Open Space and Park (TOPS) Tax. I not only worked on the initial passing of each, but also a successful extension of each. Other successful tax-issue campaigns I have worked on include the Colorado Springs Public Safety Tax, plus several school district bond and mill levy issues.

Todd Vitale, owner of Vitale & Associates, has more than 30 years of research experience, including the past 20 years in Colorado. He has done work for Adams County, Douglas County, Clear Creek County, Jefferson County, and numerous cities in Colorado including Littleton, Broomfield, Colorado Springs, Thornton, Aurora and Pueblo.

We feel our experience is great fit for Arapahoe County because we have successfully accomplished several initiatives similar to what you want to do, and we bring expertise in the full-range of services you need — research, strategy and communications.

I look forward to hearing from you.

Sincerely,



Kyle Blakely
Manager/CEO

2. Experience of the consultant (or team) in providing similar services of this scope and achieved successes.

Below are overviews of three projects that Blakely + Company and Todd Vitale have worked on together in the past two years, all of which are similar in scope to what you have outlined in the RFP.

City of Castle Pines

Blakely + Company was hired by the City of Castle Pines this year to help them evaluate two potential ballot issues — a 1% sales tax dedicated to road maintenance and improvements, and a mill levy transfer from area metro districts to the City so the City could take over all management and maintenance of parks, trails, open space and recreation in the City.

The process included stakeholder interviews with key staff and the City Council, two focus groups of residents, two public meetings and a phone survey of registered voters. Todd Vitale and his team conducted the phone survey.

Prior to the issue going on the ballot Kyle helped develop the strategy and execution for a public education campaign that provided details to citizens about why each issue was good for the City, including the large backlog of road improvements that were needed and how the gap was going to get significantly wider in the next couple of years.

Kyle was hired by a citizens' committee to help manage the two ballot issues and both issued passed in the recent election.

City of Cherry Hills Village

In 2022, Blakely + Company was hired by the City of Cherry Hills Village (CHV) in Arapahoe County to research and analyze three potential ballot issues and make recommendations on whether or not to put each of them on the ballot. The three issues included a change to the City Code clarifying CHV's ability to collect sales tax from remote vendors; a Construction Materials Use Tax; and authorization to move up to 2 mills of the 7.4 mill Parks & Recreation tax to the General Fund.

We conducted stakeholder interviews with City Councilors and key community members, facilitated two focus groups with likely voters, conducted a phone survey of likely voters, and held one public meeting to gather comments, opinions and insights about the three issues. Todd and his associates conducted the phone survey for this project.

After reviewing the research, we recommended they put the change to the City Code on the ballot. Prior to the campaign period, we developed and executed a public education campaign about the issue which included a mailing, presentations to HOAs and other community groups, social media posts, a press release and media interviews, along with detailed information for the City's website.

We were also hired by the citizens' committee overseeing the issue to provide campaign management and communications services. The issue passed 60/40.

Academy School District 20 Mill Levy Override

In 2022 Blakely + Company worked with Academy School District 20 (ASD20) to research voter support for a potential Mill Levy Override. The process included 15 focus groups with parents and two groups with likely voters 60 years old or older. It also included a phone survey, which was conducted by Todd and his team.

While the research found that voter support was around 55%, the school board ultimately decided to wait a year before putting the issue on the ballot. So, in May 2023, we conducted another phone survey to see if public support had increased. The poll results were actually lower, so we recommended they not go to the ballot this year. The board did not take our advice and they voted 4 to 1 to put the MLO on the ballot this year.

To help educate voters, we worked with the district's communications team to develop a communications plan to reach parents and non-parent residents in the district, demonstrating the need for the additional funding to increase teacher salaries, provide stronger security in elementary schools and increase facilities maintenance. The issue ultimately failed 57/43.

3. Identify key personnel as well as any subcontractors that would be interacting with Arapahoe County and applicable expertise.

Kyle Blakely

Kyle is the CEO and founder of Blakely + Company. He has more than 37 years of experience in strategic marketing communications and has been in the Colorado Springs market since 1991. He founded Blakely + Company in 2001. His experience includes work on more than 60 political campaigns, including numerous ballot issue campaigns around tax issues. Kyle will serve as project manager for this effort.

His tax issue experience includes the passing of the Pikes Peak Rural Transportation Authority (PPRTA) county-wide sales tax, the passing of the Public Safety sales tax for Colorado Springs, the passing of the Trails, Opens Space and Park (TOPS) sales tax, plus successful mill levy campaigns for Academy District 20 and Cheyenne Mountain School District 12. He also worked on successful extensions of the PPRTA and TOPS campaigns.

In addition to his political work, Kyle has planned and executed communications strategies for several government entities, including Colorado State Wildlife & Parks, Colorado Department of Transportation, Colorado Springs, El Paso County, Steamboat Springs, Boulder County, Golden and Eagle County.

Sheridan Kalletta

Sheridan brings more than 20 years of marketing, facilitation, data analysis and project management to the Blakely + Company team. Before working with Kyle, her most recent position was as the Workforce Marketing and Entrepreneurship Coordinator at Pikes Peak Community College. As the client, she and Kyle worked together on the college's *Career Boost* workforce development program, developing the Brand Strategy and Marketing Plan. The project included developing the name for the program, which was targeted at individuals who were unemployed or underemployed, offering six-week classes in Information Technology, Childcare and Construction.

Sheridan would help manage and facilitate the research elements we are recommending, along with managing the project schedule.

Todd Vitale, Vitale & Associates

Vitale and Associates is a strategic research firm based in Denver, Colorado. Our firm offers extensive experience and deep expertise in gauging voter opinion through accurate research, insightful analysis, and effective strategy. The firm's principal, Todd Vitale, has more than 30 years of experience in the field of public policy, campaigns and political research. In the Nineties, Vitale was a partner at a top Washington DC-based opinion research firm, then started his own Colorado polling firm in 2003. Vitale has served as research and communications strategist to more than 250 corporate, non-profit and public affairs clients at every level of government.

Vitale has done extensive work on Colorado local public affairs projects. For example, Vitale worked on successful projects for the Roaring Fork RTA, the Crested Butte Fire Protection District, Town of Breckenridge, Town of Vail, City of Durango, and many public safety related ballot measure projects throughout the country. Vitale's past client work includes more than one hundred thousand interviews in Colorado alone, including more than a two dozen ballot measure campaigns, and extensive polling work for Colorado town, city, school, county government, and other related agencies including:

4. High-level overview of the consultant's strategy and approach to providing these services within a nine-month timeframe, including expectations of how existing County resources may be used.

The project scope we have outlined here is similar to the process we used recently for our successful efforts in Cherry Hills Village and Castle Pines. It includes immersive research, both qualitative and quantitative, along with analysis of key secondary sources of information about the demographic and psychographic profiles of county residents.

Project Kick-Off

The project kick-off is essential to the success of the project. It codifies the purpose, goals and objectives for the project, plus defines what success looks like when the project is completed. The agenda for the session would include reviewing the history and how you got to this point, reviewing the scope and deliverables, reviewing the proposed methodology, gathering details about the keys issues and confirming the next steps in the process. A meeting summary will be developed, including assigned tasks and deadlines.

Stakeholder Interviews

Following the kick-off meeting, we would conduct one-on-one interviews with key individuals and stakeholders important to this process. We have found this to be a valuable step in the process, gathering additional background on the subject matter, understanding the pros and cons of the issues, and helping inform the discussion guide for the focus groups. We anticipate between 10 to 15 interviews lasting approximately one-hour each.

Secondary Data Review

Early in the project we will want to start reviewing the demographic and psychographic data that is available from you, along with the resources we have through our media planning partners. We will also review voter data in Arapahoe County to understand the dynamics of who votes and how they are likely to vote on particular issues.

Focus Groups

We are recommending three focus groups throughout the county, with 8-10 participants each. The participants would be likely voters, which is more valuable and accurate than simply recruiting registered voters. The groups would be recruited through the City's social media channels and monthly newsletter. Each group would be 60-90 minutes and we would pay participants \$80 each for taking part in the groups.

The purpose of the groups is to gather qualitative data — attitudes and opinions — about the key issues. It allows us to go in-depth and study the response to different messages and facts. The results would help in developing the questionnaire for the polling phase.

Community Meetings

We are proposing three community meetings during this phase of the project, each in a different area of the county. The meetings will include presentations about the key issues, plus gathering input from residents. The input received from these meetings will also help inform the questions we ask in the survey.

Polling

Using what we learned in the focus groups and community meetings, we will conduct a survey of residents to broaden the reach of input and potentially provide statistically valid data around community support for the various issues, along with measuring the effectiveness of potential messages.

The goal would be to collect 400 completes surveys, which will provide a strong confidence level and margin of error, plus allow us to get more quality crosstab information about various demographic segments of the county. The survey would include 20-30 questions (including demographic questions), which should be adequate to get the desired information. The phone survey would include a mix of home and cell phones, with text messages being used to increase the participation.

Communications Strategy Development

At the end of the research, we will have answers to the critical questions you need for the ballot issue and can help outline a campaign strategy utilizing that information. The communications plan will include measurable objectives, key messages, segmented target audiences, along with the strategies and tactics that will most effectively communicate with residents.

Communications Strategy Implementation

Once the strategy is approved, we will develop the content needed to execute the plan and oversee the implementation of the various campaign phases. Throughout the project we will work closely with your team to utilize their expertise and experience whenever possible.

5. Current capacity and potential conflicts to provide services identified in the scope.

Blakely + Company and Vitale & Associates have the capacity to work with you on this project and devote the time and attention in needs. We do not have any conflicts of interest that would prevent us from working with you.

6. List of three references that can speak to similar past performance.

Michael Penny

City Manager
City of Castle Pines
(303) 705-0206
michael.penny@castlepinesco.gov

Allison Cortez

Chief Communication Officer
Academy District 20
719-322-5839
allison.cortez@asd20.org

Chris Cramer

City Manager
City of Cherry Hills Village
(303) 783-2749
ccramer@cherryhillsvillage.com

Randy Weil

City Council
City of Cherry Hills Village
(303) 725-1706
randolph.weil@gmail.com

Note: Chris Cramer recently took a one-year Leave of Absence from the City of Cherry Hills Village. If he is unreachable, an alternate reference is Randy Weil, the City Council member Kyle worked most closely with on that project and campaign.



ARAPAHOE COUNTY

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Purchasing Division
5334 South Prince Street, Room 480
Littleton, Colorado 80120
REQUEST FOR PROPOSAL
PRICING FORM

FEE SCHEDULE

The submittal should include a fee schedule appendix that identifies:

1. Monthly retainer for services
2. Anticipated third-party tactical cost estimates (i.e. coalition building, polling, technology).
3. Identified unknown costs/tactics for further discussion and consideration.

FEES

1. Monthly Retainer — \$4,750

- Includes meetings, secondary data review, focus group planning and facilitation, public meeting planning and facilitation, polling coordination, communications strategy development and time spent on the execution of the strategy.
- For nine months, the total fee would be \$42,750

2. Third-Party Tactical Cost Estimates

Polling — \$36,000

- 400 completed surveys

Focus Groups — \$3,000

- Includes the \$75 stipend for 30 participants, plus drinks and food for the groups.

3. Identified unknown costs/tactics for further discussion and consideration.

- Out-of-pocket costs associated with the execution of the communications strategy are not known at this time. This could include printing, digital media, video, photography and other services needed to execute the plan.



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5334 South Prince Street, Room 480
Littleton, Colorado 80120**

**REQUEST FOR PROPOSAL
REQUIRED SUBMITTAL FORM**

SUBMITTED BY:

Company Name: BLAKELY + COMPANY

Contact Names: Sales/Customer Service: Kyle Blakely

Address: P.O. Box 1070, Monument, CO 80132

Phone: (719) 439-4890 Email(s): Kyle@blakelycompany.com

The undersigned hereby affirms that:

- He/she is a duly authorized agent of the vendor;
- He/she has read all Terms and Conditions and technical specifications made available in conjunction with this solicitation and fully accepts and acknowledges this offer is consistent with the specifications and terms and conditions, unless specific variations have been clearly and expressly listed in the offer.
- The Offer is in all respects fair, without outside collusion or otherwise illegal action.

By [Signature] 11-21-23 84-1604977
 Signature of Authorized Agent Date FEIN

Kyle Blakely Manager / CEO Kyle@blakelycompany.com
 Typed/Printed Name of Agent Title of Agent Agent email

PAYMENT TERMS: If the vendor does not accept a percentage discount, the County standard is net thirty (30) days after the date that the County receives an accurate invoice and has accepted the product or service. Payment is the date of the check mailing or date of the credit card transaction.

Discount: ___ % ___ Days, Net: 30 Days, Accept Visa without additional fee? NO

VARIATIONS: The vendor shall identify all variations and exceptions to any RFP documents. Submittal of a Vendor Contract is considered excessive in Variations and may be cause for determining that the Bid/Offer is non-responsive and ineligible for award. For each variation listed, reference the applicable section of the solicitation document as per the example below. If no variations are listed here, it is understood that the vendor's Offer fully complies with all terms and conditions. Attach additional Variation sheets in the same format as below.

Page #: ___ Item # or Section: ___ Variance ___

SUBMITTAL INSTRUCTIONS:

Proposals shall be submitted in the order listed below with each section clearly identified.

- Submit questions and submittal ON-LINE at BidnetDirect.com before deadlines
- Cover & Executive Summary. Detail Firm's and employees' Capabilities, Experience & Licensing
- Details of Proposal – Proposed products & services, implementation timeline and warranties.
- Completed Submittal Forms including this sheet and all other attachments specifically requested including a Performance Measures Form when requested.
- Required Documentation – Provide documentation that satisfies the request.
- Pricing – All fee and costs associated with the proposal.
- Insurance – Checking this box accepts that the insurance requirements listed by the County are acceptable unless listed in the variations on the previous page.
- CONFIDENTIAL information, if any, MUST be stamped as such on each page and submitted separately.
- Please initial to acknowledge Addenda, if any, have been considered in your proposal:
#1 *FLB* #2 _____ #3 _____ #4 _____ #5 _____

REFERENCES:

Check here if Firm's standard reference sheet is attached, otherwise, use the space below.
References provided in proposal.

Name: _____ Contact Person: _____

Address: _____

Telephone No: _____ Email: _____

Describe type of work/service performed or items supplied: _____

Name: _____ Contact Person: _____

Address: _____

Telephone No: _____ Email: _____

Describe type of work/service performed or items supplied: _____

Name: _____ Contact Person: _____

Address: _____

Telephone No: _____ Email: _____

Describe type of work/service performed or items supplied: _____

Arapahoe County must have on file a completed W-9 prior to doing business with contractors.