

# AGREEMENT FOR SERVICES OF INDEPENDENT CONTRACTOR

**THIS AGREEMENT** (hereafter Agreement) is made by and between the County of Santa Barbara, a political subdivision of the State of California (hereafter COUNTY) and SOUTHWEST STRATEGIES GROUP, LLC with an address at 12770 El Camino Real, Suite 100, San Diego, CA 92130 (hereafter CONTRACTOR) wherein CONTRACTOR agrees to provide and COUNTY agrees to accept the services specified herein.

**WHEREAS**, CONTRACTOR represents that it is specially trained, skilled, experienced, and competent to perform the special services required by COUNTY and COUNTY desires to retain the services of CONTRACTOR pursuant to the terms, covenants, and conditions herein set forth;

**NOW, THEREFORE**, in consideration of the mutual covenants and conditions contained herein, the parties agree as follows:

## **1. DESIGNATED REPRESENTATIVE**

JACKIE RUIZ at phone number 805-951-0418 is the representative of COUNTY and will administer this Agreement for and on behalf of COUNTY. JESSICA LUTERNAUER at phone number 805-895-0904 is the authorized representative for CONTRACTOR. Changes in designated representatives shall be made only after advance written notice to the other party.

## **2. NOTICES**

Any notice or consent required or permitted to be given under this Agreement shall be given to the respective parties in writing, by personal delivery or facsimile, or with postage prepaid by first class mail, registered or certified mail, or express courier service, as follows:

To COUNTY: County of Santa Barbara  
Office of Emergency Management  
Attn: Jackie Ruiz  
4408 Cathedral Oaks Road, Santa Barbara, CA 93110  
Email: [OEM@countyofsb.org](mailto:OEM@countyofsb.org)

To CONTRACTOR: Southwest Strategies, LLC  
Attn: Jessica Luternauer  
12770 El Camino Real Suite 100, San Diego, CA 92130  
Email: [jluternauer@swspr.com](mailto:jluternauer@swspr.com)

or at such other address or to such other person that the parties may from time to time designate in accordance with this Notices section. If sent by first class mail, notices and consents under this section

shall be deemed to be received five (5) days following their deposit in the U.S. mail. This Notices section shall not be construed as meaning that either party agrees to service of process except as required by applicable law.

### **3. SCOPE OF SERVICES**

CONTRACTOR agrees to provide services to COUNTY in accordance with EXHIBIT A STATEMENT OF WORK attached hereto and incorporated herein by reference.

### **4. TERM**

CONTRACTOR shall continue performance under this Agreement, having commenced work related to the Bilingual Train-the-Trainer project and Print, Digital, and Multimedia Outreach Products project on January 22, 2025, and end performance upon completion, but no later than June 30, 2026 unless otherwise directed by COUNTY or unless earlier terminated.

### **5. COMPENSATION OF CONTRACTOR**

In full consideration for CONTRACTOR's services, CONTRACTOR shall be paid for performance under this Agreement in accordance with the terms of EXHIBIT B attached hereto and incorporated herein by reference. Billing shall be made by invoice, which shall include the contract number assigned by COUNTY and which is delivered to the address given in Section 2 NOTICES above following completion of the increments identified on EXHIBIT B. Unless otherwise specified on EXHIBIT B, payment shall be net thirty (30) days from presentation of invoice.

### **6. INDEPENDENT CONTRACTOR**

It is mutually understood and agreed that CONTRACTOR (including any and all of its officers, agents, and employees), shall perform all of its services under this Agreement as an independent contractor as to COUNTY and not as an officer, agent, servant, employee, joint venturer, partner, or associate of COUNTY. Furthermore, COUNTY shall have no right to control, supervise, or direct the manner or method by which CONTRACTOR shall perform its work and function. However, COUNTY shall retain the right to administer this Agreement so as to verify that CONTRACTOR is performing its obligations in accordance with the terms and conditions hereof. CONTRACTOR understands and acknowledges that it shall not be entitled to any of the benefits of a COUNTY employee, including but not limited to vacation, sick leave, administrative leave, health insurance, disability insurance, retirement, unemployment insurance, workers' compensation and protection of tenure. CONTRACTOR shall be solely liable and responsible for providing to, or on behalf of, its employees all legally-required employee benefits. In addition, CONTRACTOR shall be solely responsible and save COUNTY harmless from all matters relating to payment of CONTRACTOR's employees, including compliance with Social Security withholding and all other regulations governing such matters. It is acknowledged that during the term of this Agreement, CONTRACTOR may be providing services to others unrelated to the COUNTY or to this Agreement.

## **7. STANDARD OF PERFORMANCE**

CONTRACTOR represents that it has the skills, expertise, and licenses/permits necessary to perform the services required under this Agreement. Accordingly, CONTRACTOR shall perform all such services in the manner and according to the standards observed by a competent practitioner of the same profession in which CONTRACTOR is engaged. All products of whatsoever nature, which CONTRACTOR delivers to COUNTY pursuant to this Agreement, shall be prepared in a first class and workmanlike manner and shall conform to the standards of quality normally observed by a person practicing in CONTRACTOR's profession. CONTRACTOR shall correct or revise any errors or omissions, at COUNTY'S request without additional compensation. Permits and/or licenses shall be obtained and maintained by CONTRACTOR without additional compensation.

## **8. DEBARMENT AND SUSPENSION**

CONTRACTOR certifies to COUNTY that it and its employees and principals are not debarred, suspended, or otherwise excluded from or ineligible for, participation in federal, state, or county government contracts. CONTRACTOR certifies that it shall not contract with a subcontractor that is so debarred or suspended.

## **9. TAXES**

CONTRACTOR shall pay all taxes, levies, duties, and assessments of every nature due in connection with any work under this Agreement and shall make any and all payroll deductions required by law. COUNTY shall not be responsible for paying any taxes on CONTRACTOR's behalf, and should COUNTY be required to do so by state, federal, or local taxing agencies, CONTRACTOR agrees to promptly reimburse COUNTY for the full value of such paid taxes plus interest and penalty, if any. These taxes shall include, but not be limited to, the following: FICA (Social Security), unemployment insurance contributions, income tax, disability insurance, and workers' compensation insurance.

## **10. CONFLICT OF INTEREST**

CONTRACTOR covenants that CONTRACTOR presently has no employment or interest and shall not acquire any employment or interest, direct or indirect, including any interest in any business, property, or source of income, which would conflict in any manner or degree with the performance of services required to be performed under this Agreement. CONTRACTOR further covenants that in the performance of this Agreement, no person having any such interest shall be employed by CONTRACTOR. CONTRACTOR must promptly disclose to COUNTY, in writing, any potential conflict of interest. COUNTY retains the right to waive a conflict of interest disclosed by CONTRACTOR if COUNTY determines it to be immaterial, and such waiver is only effective if provided by COUNTY to CONTRACTOR in writing.

## **11. OWNERSHIP OF DOCUMENTS AND INTELLECTUAL PROPERTY**

COUNTY shall be the owner of the following items incidental to this Agreement upon production, whether or not completed: all data collected, all documents of any type whatsoever, all photos, designs, sound or audiovisual recordings, software code, inventions, technologies, and other materials, and any

material necessary for the practical use of such items, from the time of collection and/or production whether or not performance under this Agreement is completed or terminated prior to completion. CONTRACTOR shall not release any of such items to other parties except after prior written approval of COUNTY.

Unless otherwise specified in Exhibit A, CONTRACTOR hereby assigns to COUNTY all copyright, patent, and other intellectual property and proprietary rights to all data, documents, reports, photos, designs, sound or audiovisual recordings, software code, inventions, technologies, and other materials prepared or provided by CONTRACTOR pursuant to this Agreement (collectively referred to as "Copyrightable Works and Inventions"). COUNTY shall have the unrestricted authority to copy, adapt, perform, display, publish, disclose, distribute, create derivative works from, and otherwise use in whole or in part, any Copyrightable Works and Inventions. CONTRACTOR agrees to take such actions and execute and deliver such documents as may be needed to validate, protect and confirm the rights and assignments provided hereunder. CONTRACTOR warrants that any Copyrightable Works and Inventions and other items provided under this Agreement will not infringe upon any intellectual property or proprietary rights of any third party. CONTRACTOR at its own expense shall defend, indemnify, and hold harmless COUNTY against any claim that any Copyrightable Works or Inventions or other items provided by CONTRACTOR hereunder infringe upon intellectual or other proprietary rights of a third party, and CONTRACTOR shall pay any damages, costs, settlement amounts, and fees (including attorneys' fees) that may be incurred by COUNTY in connection with any such claims. This Ownership of Documents and Intellectual Property provision shall survive expiration or termination of this Agreement.

## **12. NO PUBLICITY OR ENDORSEMENT**

CONTRACTOR shall not use COUNTY's name or logo or any variation of such name or logo in any publicity, advertising or promotional materials. CONTRACTOR shall not use COUNTY's name or logo in any manner that would give the appearance that the COUNTY is endorsing CONTRACTOR. CONTRACTOR shall not in any way contract on behalf of or in the name of COUNTY. CONTRACTOR shall not release any informational pamphlets, notices, press releases, research reports, or similar public notices concerning the COUNTY or its projects, without obtaining the prior written approval of COUNTY.

## **13. COUNTY PROPERTY AND INFORMATION**

All of COUNTY's property, documents, and information provided for CONTRACTOR's use in connection with the services shall remain COUNTY's property, and CONTRACTOR shall return any such items whenever requested by COUNTY and whenever required according to the Termination section of this Agreement. CONTRACTOR may use such items only in connection with providing the services. CONTRACTOR shall not disseminate any COUNTY property, documents, or information without COUNTY's prior written consent.



#### **14. RECORDS, AUDIT, AND REVIEW**

CONTRACTOR shall keep such business records pursuant to this Agreement as would be kept by a reasonably prudent practitioner of CONTRACTOR's profession and shall maintain such records for at least four (4) years following the termination of this Agreement. All accounting records shall be kept in accordance with generally accepted accounting principles. COUNTY shall have the right to audit and review all such documents and records at any time during CONTRACTOR's regular business hours or upon reasonable notice. In addition, if this Agreement exceeds ten thousand dollars (\$10,000.00), CONTRACTOR shall be subject to the examination and audit of the California State Auditor, at the request of the COUNTY or as part of any audit of the COUNTY, for a period of three (3) years after final payment under the Agreement (Cal. Govt. Code Section 8546.7). CONTRACTOR shall participate in any audits and reviews, whether by COUNTY or the State, at no charge to COUNTY.

If federal, state or COUNTY audit exceptions are made relating to this Agreement, CONTRACTOR shall reimburse all costs incurred by federal, state, and/or COUNTY governments associated with defending against the audit exceptions or performing any audits or follow-up audits, including but not limited to: audit fees, court costs, attorneys' fees based upon a reasonable hourly amount for attorneys in the community, travel costs, penalty assessments and all other costs of whatever nature. Immediately upon notification from COUNTY, CONTRACTOR shall reimburse the amount of the audit exceptions and any other related costs directly to COUNTY as specified by COUNTY in the notification.

#### **15. INDEMNIFICATION AND INSURANCE**

CONTRACTOR agrees to the indemnification and insurance provisions as set forth in EXHIBIT C attached hereto and incorporated herein by reference.

#### **16. NONDISCRIMINATION**

COUNTY hereby notifies CONTRACTOR that COUNTY's Unlawful Discrimination Ordinance (Article XIII of Chapter 2 of the Santa Barbara County Code) applies to this Agreement and is incorporated herein by this reference with the same force and effect as if the ordinance were specifically set out herein and CONTRACTOR agrees to comply with said ordinance.

#### **17. NONEXCLUSIVE AGREEMENT**

CONTRACTOR understands that this is not an exclusive Agreement and that COUNTY shall have the right to negotiate with and enter into contracts with others providing the same or similar services as those provided by CONTRACTOR as the COUNTY desires.

#### **18. NON-ASSIGNMENT**

CONTRACTOR shall not assign, transfer or subcontract this Agreement or any of its rights or obligations under this Agreement without the prior written consent of COUNTY and any attempt to so assign, subcontract or transfer without such consent shall be void and without legal effect and shall constitute grounds for termination.

## 19. TERMINATION

- A. By COUNTY. COUNTY may, by written notice to CONTRACTOR, terminate this Agreement in whole or in part at any time, whether for COUNTY's convenience, for nonappropriation of funds, or because of the failure of CONTRACTOR to fulfill the obligations herein.
1. **For Convenience.** COUNTY may terminate this Agreement in whole or in part upon thirty (30) days written notice. During the thirty (30) day period, CONTRACTOR shall, as directed by COUNTY, wind down and cease its services as quickly and efficiently as reasonably possible, without performing unnecessary services or activities and by minimizing negative effects on COUNTY from such winding down and cessation of services.
  2. **For Nonappropriation of Funds.** Notwithstanding any other provision of this Agreement, in the event that no funds or insufficient funds are appropriated or budgeted by federal, state or COUNTY governments, or funds are not otherwise available for payments in the fiscal year(s) covered by the term of this Agreement, then COUNTY will notify CONTRACTOR of such occurrence and COUNTY may terminate or suspend this Agreement in whole or in part, with or without a prior notice period. Subsequent to termination of this Agreement under this provision, COUNTY shall have no obligation to make payments with regard to the remainder of the term.
  3. **For Cause.** Should CONTRACTOR default in the performance of this Agreement or materially breach any of its provisions, COUNTY may, at COUNTY's sole option, terminate or suspend this Agreement in whole or in part by written notice. Upon receipt of notice, CONTRACTOR shall immediately discontinue all services affected (unless the notice directs otherwise) and notify COUNTY as to the status of its performance. The date of termination shall be the date the notice is received by CONTRACTOR, unless the notice directs otherwise.
- B. By CONTRACTOR. Should COUNTY fail to pay CONTRACTOR all or any part of the payment set forth in EXHIBIT B, CONTRACTOR may, at CONTRACTOR's option terminate this Agreement if such failure is not remedied by COUNTY within thirty (30) days of written notice to COUNTY of such late payment.
- C. Upon termination, CONTRACTOR shall deliver to COUNTY all data, estimates, graphs, summaries, reports, and all other property, records, documents or papers as may have been accumulated or produced by CONTRACTOR in performing this Agreement, whether completed or in process, except such items as COUNTY may, by written permission, permit CONTRACTOR to retain. Notwithstanding any other payment provision of this Agreement, COUNTY shall pay CONTRACTOR for satisfactory

services performed to the date of termination to include a prorated amount of compensation due hereunder less payments, if any, previously made. In no event shall CONTRACTOR be paid an amount in excess of the full price under this Agreement nor for profit on unperformed portions of service. CONTRACTOR shall furnish to COUNTY such financial information as in the judgment of COUNTY is necessary to determine the reasonable value of the services rendered by CONTRACTOR. In the event of a dispute as to the reasonable value of the services rendered by CONTRACTOR, the decision of COUNTY shall be final. The foregoing is cumulative and shall not affect any right or remedy which COUNTY may have in law or equity.

## **20. SECTION HEADINGS**

The headings of the several sections, and any Table of Contents appended hereto, shall be solely for convenience of reference and shall not affect the meaning, construction or effect hereof.

## **21. SEVERABILITY**

If any one or more of the provisions contained herein shall for any reason be held to be invalid, illegal or unenforceable in any respect, then such provision or provisions shall be deemed severable from the remaining provisions hereof, and such invalidity, illegality or unenforceability shall not affect any other provision hereof, and this Agreement shall be construed as if such invalid, illegal or unenforceable provision had never been contained herein.

## **22. REMEDIES NOT EXCLUSIVE**

No remedy herein conferred upon or reserved to COUNTY is intended to be exclusive of any other remedy or remedies, and each and every such remedy, to the extent permitted by law, shall be cumulative and in addition to any other remedy given hereunder or now or hereafter existing at law or in equity or otherwise.

## **23. TIME IS OF THE ESSENCE**

Time is of the essence in this Agreement and each covenant and term is a condition herein.

## **24. NO WAIVER OF DEFAULT**

No delay or omission of COUNTY to exercise any right or power arising upon the occurrence of any event of default shall impair any such right or power or shall be construed to be a waiver of any such default or an acquiescence therein; and every power and remedy given by this Agreement to COUNTY shall be exercised from time to time and as often as may be deemed expedient in the sole discretion of COUNTY.

## **25. ENTIRE AGREEMENT AND AMENDMENT**

In conjunction with the matters considered herein, this Agreement contains the entire understanding and agreement of the parties and there have been no promises, representations, agreements, warranties or undertakings by any of the parties, either oral or written, of any character or nature hereafter binding except as set forth herein. This Agreement may be altered, amended or modified only by an instrument

in writing, executed by the parties to this Agreement and by no other means. Each party waives their future right to claim, contest or assert that this Agreement was modified, canceled, superseded, or changed by any oral agreements, course of conduct, waiver or estoppel.

## **26. SUCCESSORS AND ASSIGNS**

All representations, covenants and warranties set forth in this Agreement, by or on behalf of, or for the benefit of any or all of the parties hereto, shall be binding upon and inure to the benefit of such party, its successors and assigns.

## **27. COMPLIANCE WITH LAW**

CONTRACTOR shall, at its sole cost and expense, comply with all County, State and Federal ordinances and statutes now in force or which may hereafter be in force with regard to this Agreement. The judgment of any court of competent jurisdiction, or the admission of CONTRACTOR in any action or proceeding against CONTRACTOR, whether COUNTY is a party thereto or not, that CONTRACTOR has violated any such ordinance or statute, shall be conclusive of that fact as between CONTRACTOR and COUNTY.

## **28. CALIFORNIA LAW AND JURISDICTION**

This Agreement shall be governed by the laws of the State of California. Any litigation regarding this Agreement or its contents shall be filed in the County of Santa Barbara, if in state court, or in the federal district court nearest to Santa Barbara County, if in federal court.

## **29. EXECUTION OF COUNTERPARTS**

This Agreement may be executed in any number of counterparts and each of such counterparts shall for all purposes be deemed to be an original; and all such counterparts, or as many of them as the parties shall preserve undestroyed, shall together constitute one and the same instrument.

## **30. AUTHORITY**

All signatories and parties to this Agreement warrant and represent that they have the power and authority to enter into this Agreement in the names, titles and capacities herein stated and on behalf of any entities, persons, or firms represented or purported to be represented by such entity(ies), person(s), or firm(s) and that all formal requirements necessary or required by any state and/or federal law in order to enter into this Agreement have been fully complied with. Furthermore, by entering into this Agreement, CONTRACTOR hereby warrants that it shall not have breached the terms or conditions of any other contract or agreement to which CONTRACTOR is obligated, which breach would have a material effect hereon.

## **31. SURVIVAL**

All provisions of this Agreement which by their nature are intended to survive the termination or expiration of this Agreement shall survive such termination or expiration.

**32. PRECEDENCE**

In the event of conflict between the provisions contained in the numbered sections of this Agreement and the provisions contained in the Exhibits, the provisions of the Exhibits shall prevail over those in the numbered sections.

Agreement for Services of Independent Contractor between the **County of Santa Barbara** and **Southwest Strategies Group, LLC**

**IN WITNESS WHEREOF**, the parties have executed this Agreement to be effective on the date executed by COUNTY.

**ATTEST:**

Mona Miyasato  
County Executive Officer  
Clerk of the Board

By:

\_\_\_\_\_  
Deputy Clerk

**COUNTY OF SANTA BARBARA:**

By:

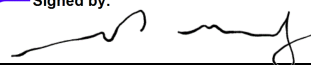
\_\_\_\_\_  
Chair, Board of Supervisors

Date:

**RECOMMENDED FOR APPROVAL:**

Santa Barbara County Fire  
Department

By:

Signed by:  
  
\_\_\_\_\_  
643A84E63CDE49D  
Fire Chief/Fire Warden

**CONTRACTOR:**

Southwest Strategies, LLC

By:

Signed by:  
  
\_\_\_\_\_  
4811D0625A0047B  
Authorized Representative

**APPROVED AS TO FORM:**

Rachel Van Mullem  
County Counsel

By:

Signed by:  
  
\_\_\_\_\_  
00C56B8DE45F483  
Deputy County Counsel

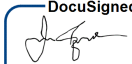
Name: Jessica Luternauer

Title: Senior Vice President and  
Partner

**APPROVED AS TO ACCOUNTING FORM:**

Betsy M. Schaffer, CPA  
Auditor-Controller

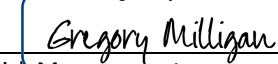
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Deputy

**APPROVED AS TO FORM:**

Risk Management

By:

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Risk Management

## **EXHIBIT A**

### **STATEMENT OF WORK**

# EXHIBIT A

## STATEMENT OF WORK

The Santa Barbara County Office of Emergency Management (hereafter “SBCOEM”) has entered into this Professional Consultant Services Agreement (hereafter “Agreement”) with Southwest Strategies Group (hereafter “SSG”) for 1) A bilingual (English/Spanish) “Train-the-Trainer” Community Education Program on disaster preparedness and 2) Printed, digital and multimedia outreach products promoting emergency preparedness and registering for ReadySBC Alerts. SSG was selected through a competitive Request for Proposal process and has demonstrated subject-matter expertise in public education and public information concepts related to emergency preparedness and response. SSG’s services are needed to develop a tailored curriculum and public information campaign focused on preparing Santa Barbara County community members for emergency situations. The original RFP was written in a manner to support potential future education and outreach efforts should additional funding be identified. This revised contract expands the scope of work to include materials for the launch of Genasys EVAC with funding that has recently been allocated for this purpose. This expanded scope is in alignment with the original RFP process but expands the deliverables of education materials. Due to the time sensitive nature of the work, need for consistency of materials for public use, and previous RFP process, it was determined that the additional work did not need to go through a new bidding process.

### **All Hazards Public Education Campaign (Per original Southwest Strategies, LLC RFP Proposal, Exhibit F)**

#### **A. General Requirements**

- i. SSG assures that personnel rendering services in accordance with this Agreement have subject matter expertise in public education, public information, and/or emergency preparedness and response and can complete tasks in a timely manner.
- ii. SSG may have existing agreements or plan to enter into agreements with other County Departments with Department-specific service objectives and authorized representatives. These agreements are separate and are not covered by the provisions of this Agreement.

#### **B. Train-the-Trainer Community Education Program Curriculum**

The Train-the-Trainer Community Education Program will provide information on local hazards, emergency and disaster preparedness basic principles, resiliency concepts, and educational/delivery approaches that prospective trainers can adapt based on the intended audience and setting. Intended audiences may include youth and young adults, seniors, individuals with disabilities and other access and functional needs (DAFN), Spanish- and Mixteco-speaking communities, agricultural/migrant workers, LGBTQ+ communities, individuals living in rural and geographically isolated communities, and individuals experiencing homelessness. Settings and the time allotted for educational and outreach opportunities may also vary significantly from indoor venues such as classrooms, community centers, and churches, to outdoor settings such as festivals, parks, and agricultural fields. SSG will complete the following:

- i. Conduct four (4) bilingual English/Spanish community listening sessions in the main geographic regions of



the county (Santa Maria, New Cuyama, Lompoc/Santa Ynez Valley, Santa Barbara/Carpinteria), and one (1) bilingual Spanish/Mixteco in the Santa Maria Valley area, to solicit input and insights on key messages and concepts for the development of the Train-the-Trainer Community Education Program. Additionally, listening sessions should solicit feedback on presentation formats, modalities and considerations based on intended audience (e.g., PowerPoint, handouts, posters, verbal only, etc.). SSG is expected to work closely with SBCOEM and local community-based organizations, faith-based organizations, among others to facilitate engagement with community members for participation in listening sessions. To support the highest level of engagement possible, a bilingual orientation detailing the objectives of the listening session followed by separate English and Spanish breakout listening sessions are necessary.

- ii. Develop a bilingual (English/Spanish) Train-the-Trainer Community Education Program curriculum for operational area partners and community-based organizations to conduct outreach emergency and disaster preparedness with a focus on vulnerable, marginalized and hard-to-reach communities. This curriculum will be user-friendly, non-technical (e.g., technologically and linguistically accessible), incorporate universally understood pictures and infographics, and apply 5<sup>th</sup> grade level reading comprehension to support use by a variety of community leaders, influencers, and cultural brokers with little to no experience in emergency and disaster preparedness concepts, such as religious practitioners, “promotores” (Spanish for “community educator”), outreach workers, and youth leaders. Curriculum must be separated into modules based on topic, target audience, and presentation type/length (e.g., 10-minute verbal preparedness “pitch” versus 25-minute classroom-style presentation). Curriculum content must integrate findings and guiding principles from the Federal Emergency Management Agency’s (FEMA) “Building Cultures of Preparedness” report. Project proposals must indicate costs for forty (40) English and Spanish printed and in-binder copies of the curriculum.
- iii. Deliver one (1) Train-the-Trainer Community Education Program overview session to OEM staff and partner agencies to solicit feedback on areas of improvement for the program and/or delivery. SSG will work with the SBCOEM Project Manager to identify improvement priorities and implement program/delivery improvements before finalization.

### **C. Printed, Digital and Multimedia Outreach Products**

- i. Develop three (3) Public Service Announcement (PSA) videos and three (3) traditional and streaming radio spots in English, Spanish, and Mixteco (one in each language). PSAs and radio spots will cover emergency preparedness for all hazards and registering for Santa Barbara County ReadySBC Alerts. PSAs will include closed captioning text and American Sign Language picture in picture interpretation.
- ii. Develop two (2) print and digital ads advertising registering for Santa Barbara County ReadySBC Alerts in English and Spanish (two in each language).
- iii. Develop 6-8 “blue skies” emergency and disaster preparedness message scripts in English and Spanish for County-operated AM radio stations (6-8 in each language).
- iv. Develop new and/or update existing printed and digital community educational and promotional materials on all-hazards preparedness, including brochures, flyers, and social media infographics. A total of 10 brochures/flyers (5 English and 5 Spanish) and 16 social media infographics products (8 English and 8 Spanish) must be completed for this project. Digital materials produced will include

transcriptions of images and infographics for inclusion as alternate text to support accessible website content and social media messaging.

**Genasys EVAC Emergency Zone Maps Public Education Campaign (Contract Modification #1)**

**D. Develop Public Service Announcements (PSA), print, and digital ads**

- i. PSA Videos (2 English, 2 Spanish)
  1. At least 30 seconds
  2. At least two in each language
  3. PSAs will include closed captioning text and ASL interpretation picture in picture.
- ii. Radio (traditional and streaming) Station PSA (1 English, 1 Spanish, 1 Mixteco)
  1. 30 seconds
  2. At least one in each language
- iii. Placement of PSAs on local radio, television, and online (ex. Social Media Channels, Media Websites, Google Ads, Music Streaming Services) AND placement of print and digital ads in local newspapers and online (ex. Social Media Channels, Media Websites, Google Ads, Music Streaming Services)
  1. Devise and execute communications strategy for placement of PSAs, print, and digital ads on local radio, television, and online in English, Spanish and Mixteco.
  2. Contractor will develop strategy, make recommendations and OEM will approve said strategy before implementation.
  3. Contract includes \$25,926 for all ad and PSA placement.
  2. Final video PSAs will be shared in MP4 format with OEM. Final radio ads will be shared in MP3 format with OEM. Final print and digital ads will be shared in PDF format with OEM.

**E. Development of Bilingual Trifold (English and Spanish)**

1. Final version of trifold will be shared in PDF format with OEM.
2. Contractor will print 500 full-color, glossy tri-fold brochures.

**F. Develop community educational and promotional materials “Know Your Way Out, Know Your Neighborhood”**

Digital materials produced will include transcriptions of images and infographics for inclusion as alternate text to support accessible website content and social media messaging.

1. Development of 275 distinct, bilingual handouts for County identified areas. Each handout may include one or more Genasys EVAC zones. A bilingual template will be developed and zone-specific information will be added.
  - i. Contractor will add components to indicate evacuation routes on maps for each of the areas selected. OEM will provide maps for each of the areas.
  - ii. Final versions will be shared in PDF format with OEM.
  - iii. Contractor and OEM will work together to determine how many printed versions of the handouts are needed and can be printed within printing budget.
2. Development of 6 social media graphics (3 in English and 3 in Spanish)
  - i. Final versions will be shared in PDF and JPG format with OEM.
3. Host (3) three virtual community partner sessions for input on developed products.
4. Webpage content development for ReadySBC.org in English and Spanish.
5. Campaign talking points in English and Spanish on “Know Your Way Out, Know Your Neighborhood”.

**EXHIBIT B – B1**

**PAYMENT ARRANGEMENTS**

**And**

**SCHEDULE OF FEES**

## EXHIBIT B

### PAYMENT ARRANGEMENTS

#### Periodic Compensation (with attached Schedule of Fees)

- A. For CONTRACTOR services to be rendered under this Agreement, CONTRACTOR shall be paid a total contract amount, including cost reimbursements, not to exceed **\$257,000**. The contract has been paid \$22,613.75 as of May 9, 2025, and there is a remaining \$234,386.25 due on the contract.
- B. Payment for services and /or reimbursement of costs shall be made upon CONTRACTOR's satisfactory performance, based upon the scope and methodology contained in **EXHIBIT A** as determined by COUNTY. Payment for services and/or reimbursement of costs shall be based upon the costs, expenses, overhead charges and hourly rates for personnel, as defined in **Attachment B1** (Schedule of Fees). Invoices submitted for payment that are based upon **Attachment B1** must contain sufficient detail to enable an audit of the charges and provide supporting documentation..
- C. Monthly, CONTRACTOR shall submit to the COUNTY DESIGNATED REPRESENTATIVE an invoice or certified claim on the County Treasury for the service performed over the period specified. These invoices or certified claims must cite the assigned Board Contract Number. COUNTY DESIGNATED REPRESENTATIVE shall evaluate the quality of the service performed and if found to be satisfactory and within the cost basis of **Attachment B1** shall initiate payment processing. COUNTY shall pay invoices or claims for satisfactory work within 30 days of receipt of correct and complete invoices or claims from CONTRACTOR.
- D. COUNTY's failure to discover or object to any unsatisfactory work or billings prior to payment will not constitute a waiver of COUNTY's right to require CONTRACTOR to correct such work or billings or seek any other legal remedy.
- E. At 80% of each component of this Services contract threshold, SSG will notify SBCOEM authorized representatives verbally and in writing. SSG will actively monitor costs as they occur. Notifications are as follows:
  - i. All Hazards Public Education Campaign – 80% or \$120,000

- ii. Genasys EVAC Emergency Zone Maps Public Education Campaign – 80% or \$85,600

## EXHIBIT B1

### SCHEDULE OF FEES

CONTRACTOR and COUNTY agree to the billing rates for services as follows:

Project Manager \$235.00/hr

Multicultural Outreach and Training Lead: \$165.00/hr

Digital and Training Lead: \$195.00/hr

Project Support: \$110.00/hr

Graphic Designer: \$140.00/hr

Advertising Graphic Designer: \$130.00/hr

Contract also includes:

\$25,926 for all ad and PSA placement for Genasys EVAC project

\$3,500 for translations for Genasys EVAC project

\$2,500 for materials printing for Genasys EVAC project

SSG is not authorized to bill SBCOEM for any additional supplies, equipment and ancillary costs related to rendering services, such as but not limited to ESRI license costs, travel-related expenses (e.g., gas, insurance coverage), and food/beverage costs. Any additional costs are assumed to be reflected within the base hourly rates noted in this Agreement.

## **EXHIBIT C**

# **INDEMNIFICATION AND INSURANCE REQUIREMENTS**

## EXHIBIT C

### Indemnification and Insurance Requirements

#### (For Professional Contracts)

##### INDEMNIFICATION

CONTRACTOR agrees to indemnify, defend (with counsel reasonably approved by COUNTY) and hold harmless COUNTY and its officers, officials, employees, agents and volunteers from and against any and all claims, actions, losses, damages, judgments and/or liabilities arising out of this Agreement from any cause whatsoever, including the acts, errors or omissions of any person or entity and for any costs or expenses (including but not limited to attorneys' fees) incurred by COUNTY on account of any claim except where such indemnification is prohibited by law. CONTRACTOR'S indemnification obligation applies to COUNTY'S active as well as passive negligence but does not apply to COUNTY'S sole negligence or willful misconduct.

##### NOTIFICATION OF ACCIDENTS AND SURVIVAL OF INDEMNIFICATION PROVISIONS

CONTRACTOR shall notify COUNTY immediately in the event of any accident or injury arising out of or in connection with this Agreement. The indemnification provisions in this Agreement shall survive any expiration or termination of this Agreement.

##### INSURANCE

CONTRACTOR shall procure and maintain for the duration of this Agreement insurance against claims for injuries to persons or damages to property which may arise from or in connection with the performance of the work hereunder and the results of that work by the CONTRACTOR, its agents, representatives, employees or subcontractors.

#### A. Minimum Scope of Insurance

Coverage shall be at least as broad as:

1. **Commercial General Liability (CGL):** Insurance Services Office (ISO) Form CG 00 01 covering CGL on an "occurrence" basis, including products-completed operations, personal & advertising injury, with limits no less than \$1,000,000 per occurrence and \$2,000,000 in the aggregate.
2. **Automobile Liability:** Insurance Services Office Form Number CA 0001 covering, Code 1 (any auto), or if CONTRACTOR has no owned autos, Code 8 (hired) and 9 (non-owned), with limit no less than \$1,000,000 per accident for bodily injury and property damage.
3. **Workers' Compensation:** Insurance as required by the State of California, with Statutory Limits, and Employer's Liability Insurance with limit of no less than \$1,000,000 per accident

for bodily injury or disease. ***(Not required if CONTRACTOR provides written verification that it has no employees)***

4. **Professional Liability:** (Errors and Omissions) Insurance appropriate to the CONTRACTOR'S profession, with limit no less than \$2,000,000 per occurrence or claim, \$2,000,000 aggregate.

If the CONTRACTOR maintains broader coverage and/or higher limits than the minimums shown above, the COUNTY requires and shall be entitled to the broader coverage and/or the higher limits maintained by the CONTRACTOR. Any available insurance proceeds in excess of the specified minimum limits of insurance and coverage shall be available to the COUNTY.

**B. Other Insurance Provisions**

The insurance policies are to contain, or be endorsed to contain, the following provisions:

1. **Additional Insured** – COUNTY, its officers, officials, employees, agents and volunteers are to be covered as additional insureds on the CGL policy with respect to liability arising out of work or operations performed by or on behalf of the CONTRACTOR including materials, parts, or equipment furnished in connection with such work or operations. General liability coverage can be provided in the form of an endorsement to the CONTRACTOR'S insurance at least as broad as ISO Form CG 20 10 11 85 or both CG 20 10, CG 20 26, CG 20 33, or CG 20 38; and CG 20 37 forms if later revisions used).
2. **Primary Coverage** – For any claims related to this contract, the CONTRACTOR'S insurance coverage shall be primary insurance primary coverage at least as broad as ISO CG 20 01 04 13 as respects the COUNTY, its officers, officials, employees, and volunteers. Any insurance or self-insurance maintained by the COUNTY, its officers, officials, employees, or volunteers shall be excess of the CONTRACTOR'S insurance and shall not contribute with it.
3. **Notice of Cancellation** – Each insurance policy required above shall provide that coverage shall not be canceled, except with notice to the COUNTY.
4. **Waiver of Subrogation Rights** – CONTRACTOR hereby grants to COUNTY a waiver of any right to subrogation which any insurer of said CONTRACTOR may acquire against the COUNTY by virtue of the payment of any loss under such insurance. CONTRACTOR agrees to obtain any endorsement that may be necessary to effect this waiver of subrogation, but this provision applies regardless of whether or not the COUNTY has received a waiver of subrogation endorsement from the insurer.
5. **Deductibles and Self-Insured Retention** – Any deductibles or self-insured retentions must be declared to and approved by the COUNTY. The COUNTY may require the CONTRACTOR to purchase coverage with a lower deductible or retention or provide proof of ability to pay



losses and related investigations, claim administration, and defense expenses within the retention.

6. **Acceptability of Insurers** – Unless otherwise approved by Risk Management, insurance shall be written by insurers authorized to do business in the State of California and with a minimum A.M. Best's Insurance Guide rating of "A- VII".
7. **Verification of Coverage** – CONTRACTOR shall furnish the COUNTY with proof of insurance, original certificates and amendatory endorsements as required by this Agreement. The proof of insurance, certificates and endorsements are to be received and approved by the COUNTY before work commences. However, failure to obtain the required documents prior to the work beginning shall not waive the CONTRACTOR'S obligation to provide them. The CONTRACTOR shall furnish evidence of renewal of coverage throughout the term of the Agreement. The COUNTY reserves the right to require complete, certified copies of all required insurance policies, including endorsements required by these specifications, at any time.
8. **Failure to Procure Coverage** – In the event that any policy of insurance required under this Agreement does not comply with the requirements, is not procured, or is canceled and not replaced, COUNTY has the right but not the obligation or duty to terminate the Agreement. Maintenance of required insurance coverage is a material element of the Agreement and failure to maintain or renew such coverage or to provide evidence of renewal may be treated by COUNTY as a material breach of contract.
9. **Subcontractors** – CONTRACTOR shall require and verify that all subcontractors maintain insurance meeting all the requirements stated herein, and CONTRACTOR shall ensure that COUNTY is an additional insured on insurance required from subcontractors.
10. **Claims Made Policies** – If any of the required policies provide coverage on a claims-made basis:
  - i. The Retroactive Date must be shown and must be before the date of the contract or the beginning of contract work.
  - ii. Insurance must be maintained and evidence of insurance must be provided for at least five (5) years after completion of contract work.
  - iii. If coverage is canceled or non-renewed, and not replaced with another claims-made policy form with a Retroactive Date prior to the contract effective date, the CONTRACTOR must purchase "extended reporting" coverage for a minimum of five (5) years after completion of contract work.
11. **Special Risks or Circumstances** – COUNTY reserves the right to modify these requirements, including limits, based on the nature of the risk, prior experience, insurer, coverage, or other special circumstances.

Any change requiring additional types of insurance coverage or higher coverage limits must be made by amendment to this Agreement. CONTRACTOR agrees to execute any such amendment within thirty (30) days of receipt.

Any failure, actual or alleged, on the part of COUNTY to monitor or enforce compliance with any of the insurance and indemnification requirements will not be deemed as a waiver of any rights on the part of COUNTY.

## **EXHIBIT D**

### **CERTIFICATION FOR CONTRACTS, GRANTS, LOANS, AND COOPERATIVE AGREEMENTS**

**EXHIBIT D**

**CERTIFICATION FOR CONTRACTS, GRANTS, LOANS, AND COOPERATIVE AGREEMENTS**

**(Byrd Anti-Lobbying Amendment, 31 U.S.C. § 1352 (As Amended))**

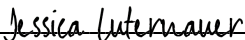
The undersigned CONTRACTOR certifies, to the best of his or her knowledge, that:

1. No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.
2. If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form- LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions.
3. The undersigned shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loans, and cooperative agreements) and that all subrecipients shall certify and disclose accordingly.

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by 31, U.S.C. § 1352 (as amended by the Lobbying Disclosure Act of 1995). Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

CONTRACTOR certifies or affirms the truthfulness and accuracy of each statement of its certification and disclosure, if any. In addition, CONTRACTOR understands and agrees that the provisions of 31 U.S.C. § 3801 et seq., apply to this certification and disclosure, if any.

Signed by:



Signature of Contractor's Authorized Official

Senior Vice President and Partner

Name and Title of Contractor's Authorized Official

5/15/2025 | 10:20 AM PDT

Date

## **EXHIBIT E**

### **FEDERAL CLAUSES**

## **Exhibit E**

### **ADDITIONAL FEDERAL CLAUSES APPLICABLE FOR FEDERAL FUNDING UNDER THIS AGREEMENT:**

**(2 CFR § 200.326; 2 CFR Part 200, Appendix II, Required Contract Clauses)**

#### **1. REMEDIES FOR NONCOMPLIANCE**

In the event COUNTY determines, in its sole discretion, that CONTRACTOR is not in compliance with the terms and conditions set forth herein, COUNTY may:

- A. Require payments as reimbursements rather than advance payments;
- B. Withhold authority to proceed to the next phase until receipt of evidence of acceptable performance within a given period of performance;
- C. Require additional, more detailed financial reports;
- D. Require additional project monitoring;
- E. Requiring CONTRACTOR to obtain technical or management assistance; or
- F. Establish additional prior approvals.

#### **2. EQUAL EMPLOYMENT OPPORTUNITY**

During the performance of this Agreement, CONTRACTOR agrees as follows:

- A. CONTRACTOR will not discriminate against any employee or applicant for employment because of race, color, religion, sex, or national origin. CONTRACTOR will take affirmative action to ensure that applicants are employed, and that employees are treated during employment without regard to their race, color, religion, sex, or national origin. Such action shall include, but not be limited to the following: Employment, upgrading, demotion, or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. CONTRACTOR agrees to post in conspicuous places, available to employees and applicants for employment, notices to be provided setting forth the provisions of this nondiscrimination clause.
- B. CONTRACTOR will, in all solicitations or advertisements for employees placed by or on behalf of CONTRACTOR, state that all qualified applicants will receive considerations for employment without regard to race, color, religion, sex, or national origin.
- C. CONTRACTOR will send to each labor union or representative of workers with which he has a collective bargaining agreement or other contract or understanding, a notice to be provided advising the said labor union or workers' representatives of CONTRACTOR'S commitments under this section, and shall post copies of the notice in conspicuous places available to employees and applicants for employment.

D. CONTRACTOR will comply with all provisions of Executive Order 11246 of September 24, 1965, and of the rules, regulations, and relevant orders of the Secretary of Labor.

E. CONTRACTOR will furnish all information and reports required by Executive Order 11246 of September 24, 1965, and by rules, regulations, and orders of the Secretary of labor, or pursuant thereto, and will permit access to his books, records, and accounts by the administering agency and the Secretary of Labor for purposes of investigation to ascertain compliance with such rules, regulations, and orders.

F. In the event of CONTRACTOR'S noncompliance with the nondiscrimination clauses of this Agreement or with any of the said rules, regulations, or orders, this Agreement may be canceled, terminated, or suspended in whole or in part and CONTRACTOR may be declared ineligible for further Government contracts or federally assisted construction contracts in accordance with procedures authorized in Executive Order 11246 of September 24, 1965, and such other sanctions as may be imposed and remedies invoked as provided in Executive Order 11246 of September 24, 1965, or by rule, regulation, or order of the Secretary of Labor, or as otherwise provided by law.

G. CONTRACTOR will include the portion of the sentence immediately preceding paragraph (1) and the provisions of paragraphs (1) through (7) in every subcontract or purchase order unless exempted by rules, regulations, or orders of the Secretary of Labor issued pursuant to section 204 of Executive Order 11246 of September 24, 1965, so that such provisions will be binding upon each subcontractor or vendor. CONTRACTOR will take such action with respect to any subcontract or purchase order as the administering agency may direct as a means of enforcing such provisions, including sanctions for noncompliance: Provided, however, that in the event a contractor becomes involved in, or is threatened with, litigation with a subcontractor or vendor as a result of such direction by the administering agency CONTRACTOR may request the United States to enter into such litigation to protect the interests of the United States.

### 3. CLEAN AIR ACT AND FEDERAL WATER POLLUTION CONTROL ACT

#### A. Clean Air Act

(1) CONTRACTOR agrees to comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act, as amended, 42 U.S.C. § 7401 et seq.

(2) CONTRACTOR agrees to report each violation to the California Environmental Protection Agency and understands and agrees that the California Environmental Protection Agency will, in turn, report each violation as required to assure notification to the COUNTY, Federal Emergency Management Agency, and the appropriate Environmental Protection Agency Regional Office.

(3) CONTRACTOR agrees to include these requirements in each subcontract exceeding \$150,000 financed in whole or in part with Federal assistance provided by FEMA.

#### B. Federal Water Pollution Control Act

(1) CONTRACTOR agrees to comply with all applicable standards, orders or

regulations issued pursuant to the Federal Water Pollution Control Act, as amended, 33 U.S.C. 1251 et seq.

(2) CONTRACTOR agrees to report each violation to the California State Water Resources Control Board and understands and agrees that the California State Water Resources Control Board will, in turn, report each violation as required to assure notification to the COUNTY, Federal Agency which provided funds in support of this Agreement, and the appropriate Environmental Protection Agency Regional Office.

(3) CONTRACTOR agrees to include these requirements in each subcontract exceeding \$150,000 financed in whole or in part with Federal assistance.

#### 4. DEBARMENT AND SUSPENSION

A. CONTRACTOR certifies to COUNTY that it and its employees and principals are not debarred, suspended, or otherwise excluded from or ineligible for, participation in federal, state, or county government contracts. CONTRACTOR certifies that it shall not contract with a subcontractor that is so debarred or suspended.

B. This certification is a material representation of fact relied upon by COUNTY. If it is later determined that CONTRACTOR did not comply with 2 C.F.R. pt. 180, subpart C and 2 C.F.R. pt. 3000, subpart C, in addition to remedies available to the California Governor's Office of Emergency Services and COUNTY, the Federal Government may pursue available remedies, including but not limited to suspension and/or debarment.

C. This Agreement is a covered transaction for purposes of 2 C.F.R. pt. 180 and 2 C.F.R. pt. 3000. As such CONTRACTOR is required to verify that none of the contractor, its principals (defined at 2 C.F.R. § 180.995), or its affiliates (defined at 2 C.F.R. § 180.905) are excluded (defined at 2 C.F.R. § 180.940) or disqualified (defined at 2 C.F.R. § 180.935).

D. CONTRACTOR must comply with 2 C.F.R. pt. 180, subpart C and 2 C.F.R. pt. 3000, subpart C and must include a requirement to comply with these regulations in any lower tier covered transaction it enters into.

E. The bidder or proposer agrees to comply with the requirements of 2 C.F.R. pt. 180, subpart C and 2 C.F.R. pt. 3000, subpart C while this offer is valid and throughout the period of any contract that may arise from this offer. The bidder or proposer further agrees to include a provision requiring such compliance in its lower tier covered transactions.

#### 5. BYRD ANTI-LOBBYING AMENDMENT, 31 U.S.C. § 1352 (AS AMENDED)

CONTRACTOR shall file the required certification attached as Exhibit E, Certification for Contracts, Grants, Loans, and Cooperative Agreement (Byrd Anti-Lobbying Amendment, 31 U.S.C. § 1352 (As Amended), which is incorporated herein by this reference. Each tier certifies to the tier above that it will not and has not used Federal appropriated funds to pay any person or organization for influencing or attempting to influence an officer or



employee of any agency, a member of Congress, officer or employee of Congress, or an employee of a member of Congress in connection with obtaining any Federal contract, grant, or any other award covered by 31 U.S.C. § 1352. Each tier shall also disclose any lobbying with non-Federal funds that takes place in connection with obtaining any Federal award. Such disclosures are forwarded from tier to tier up to the recipient.

## 6. PROCUREMENT OF RECOVERED MATERIALS

A. CONTRACTOR must comply with section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act of 1976 as amended, 42 U.S.C. 6962. The requirements of Section 6002 include procuring only items designated in the guidelines of the Environmental Protection Agency (EPA) at 40 CFR part 247 that contain the highest percentage of recovered materials practicable, consistent with maintaining a satisfactory level of competition, where the purchase price of the item exceeds \$10,000 or the value of the quantity acquired during the preceding fiscal year exceeded \$10,000; procuring solid waste management services in a manner that maximizes energy and resource recovery; and establishing an affirmative procurement program for procurement of recovered materials identified in the EPA guidelines.

B. CONTRACTOR should, to the greatest extent practicable and consistent with law, purchase, acquire, or use products and services that can be reused, refurbished, or recycled; contain recycled content, are bio based, or are energy and water efficient; and are sustainable. This may include purchasing compostable items and other products and services that reduce the use of single-use plastic products. See Executive Order 14056, section 101, Policy.

## 7. CHANGES

A. Notice. The primary purpose of this clause is to obtain prompt reporting of COUNTY conduct that CONTRACTOR considers to constitute a change to this contract. Except for changes identified as such in writing and signed by COUNTY, the Contractor shall notify the COUNTY in writing promptly, within five (5) calendar days from the date that the Contractor identifies any Government conduct (including actions, inactions, and written or oral communications) that the CONTRACTOR regards as a change to the contract terms and conditions. On the basis of the most accurate information available to the Contractor, the notice shall state

- i. The date, nature, and circumstances of the conduct regarded as a change;
- ii. The name, function, and activity of each Government individual and CONTRACTOR official or employee involved in or knowledgeable about such conduct;
- iii. The identification of any documents and the substance of any oral communication involved in such conduct;
- iv. In the instance of alleged acceleration of scheduled performance or delivery, the basis upon which it arose;

v. The particular elements of contract performance for which CONTRACTOR may seek an equitable adjustment under this clause, including:

- What line items have been or may be affected by the alleged change;
- What labor or materials or both have been or may be added, deleted, or wasted by the alleged change;
- To the extent practicable, what delay and disruption in the manner and sequence of performance and effect on continued performance have been or may be caused by the alleged change;
- What adjustments to contract price, delivery schedule, and other provisions affected by the alleged change are estimated; and

vi. CONTRACTOR'S estimate of the time by which COUNTY must respond to CONTRACTOR'S notice to minimize cost, delay or disruption of performance.

B. Continued Performance. Following submission of the required notice, CONTRACTOR shall diligently continue performance of this Agreement to the maximum extent possible in accordance with its terms and conditions as construed by the CONTRACTOR.

C. COUNTY Response. COUNTY shall promptly, within ten (10) calendar days after receipt of notice, respond to the notice in writing. In responding, COUNTY shall either --

- i. Confirm that the conduct of which CONTRACTOR gave notice constitutes a change and when necessary direct the mode of further performance;
- ii. Countermand any communication regarded as a change;
- iii. Deny that the conduct of which CONTRACTOR gave notice constitutes a change and when necessary direct the mode of further performance; or
- iv. In the event the Contractor's notice information is inadequate to make a decision, advise CONTRACTOR what additional information is required, and establish the date by which it should be furnished and the date thereafter by which COUNTY will respond.

D. Equitable Adjustments.

i. If the COUNTY confirms that COUNTY conduct effected a change as alleged by the CONTRACTOR, and the conduct causes an increase or decrease in the CONTRACTOR'S cost of, or the time required for, performance of any part of the work under this Agreement, whether changed or not changed by such conduct, an equitable adjustment shall be made --

- In the contract price or delivery schedule or both; and
- In such other provisions of the Agreement as may be affected.

ii. The Agreement shall be modified in writing accordingly. The equitable adjustment shall

not include increased costs or time extensions for delay resulting from CONTRACTOR'S failure to provide notice or to continue performance as provided herein.

## 8. ACCESS TO RECORDS

The following access to records requirements apply to this Agreement:

A. CONTRACTOR agrees to provide COUNTY, the California Governor's Office of Emergency Services, the FEMA Administrator, the Comptroller General of the United States, or any of their authorized representatives access to any books, documents, papers, and records of the CONTRACTOR which are directly pertinent to this Agreement for the purposes of making audits, examinations, excerpts, and transcriptions.

B. CONTRACTOR agrees to permit any of the foregoing parties to reproduce by any means whatsoever or to copy excerpts and transcriptions as reasonably needed.

C. CONTRACTOR agrees to provide the FEMA Administrator or his authorized representatives access to construction or other work sites pertaining to the work being completed under the Agreement.

## 9. USE OF U.S. DEPARTMENT OF HOMELAND SECURITY (DHS) LOGO

CONTRACTOR shall not use the DHS seal(s), logos, crests, or reproductions of flags or likenesses of DHS agency officials without specific FEMA pre- approval.

## 10. COMPLIANCE WITH FEDERAL LAWS, REGULATIONS, AND EXECUTIVE ORDERS

This is an acknowledgement that FEMA financial assistance will be used to fund this Agreement. CONTRACTOR will only use FEMA funds as authorized herein. CONTRACTOR will comply will all applicable federal law, regulations, executive orders, FEMA policies, procedures, and directives

## 11. NO OBLIGATION BY FEDERAL GOVERNMENT

The Federal Government is not a party to this Agreement and is not subject to any obligations or liabilities to the non-Federal entity, CONTRACTOR, or any other party pertaining to any matter resulting from the Agreement.

## 12. PROGRAM FRAUD AND FALSE OR FRAUDULENT STATEMENTS OR RELATED ACTS

CONTRACTOR acknowledges that 31 U.S.C. Chap. 38 (Administrative Remedies for False Claims and Statements) applies to the CONTRACTOR'S actions pertaining to this Agreement.

## 13. MANDATORY DISCLOSURE

CONTRACTOR must promptly disclose to the COUNTY whenever it has credible evidence of a commission of a violation of Federal criminal law involving fraud, conflict of interest, bribery, or gratuity violations found in Title 18 of the United States Code or a violation of the civil False Claims Act (31 U.S.C. §§ 3729-3733). The disclosure must be made in writing to COUNTY. In

addition, CONTRACTOR is required to report certain civil, criminal, or administrative proceedings to the System for Award Management (SAM) located at [www.sam.gov](http://www.sam.gov). Failure to make required disclosures can result in any of the remedies described in 2 CFR §200.339 Remedies for noncompliance, including suspension or debarment. (See also 2 CFR part 180, 31 U.S.C. 3321, and 41 U.S.C. 2313.)

#### 14. DOMESTIC PREFERENCES FOR PROCUREMENTS

A. CONTRACTOR should, to the greatest extent practicable and consistent with law, provide a preference for the purchase, acquisition, or use of goods, products, or materials produced in the United States (including but not limited to iron, aluminum, steel, cement, and other manufactured products). The requirement of this section must be included in all subawards, contracts, and purchase orders under Federal awards.

B. For purposes of this section:

- i. “Produced in the United States” means, for iron and steel products, that all manufacturing processes, from the initial melting stage through the application of coatings, occurred in the United States.
- ii. “Manufactured products” means items and construction materials composed in whole or in part of non-ferrous metals such as aluminum; plastics and polymer-based products such as polyvinyl chloride pipe; aggregates such as concrete; glass, including optical fiber; and lumber.

#### 15. PROHIBITION ON CERTAIN TELECOMMUNICATIONS AND VIDEO SURVEILLANCE SERVICES OR EQUIPMENT

A. CONTRACTOR is prohibited from obligating or expending loan or grant funds to:

- i. Procure or obtain covered telecommunications equipment or services;
- ii. Extend or renew a contract to procure or obtain covered telecommunications equipment or services; or
- iii. Enter into a contract (or extend or renew a contract) to procure or obtain covered telecommunications equipment or services.

B. As described in Public Law 115-232, section 889, “covered telecommunications equipment” means and of the following:

- i. Telecommunications equipment produced by Huawei Technologies Company or ZTE Corporation (or any subsidiary or affiliate of such entities).
- ii. For the purpose of public safety, security of government facilities, physical security surveillance of critical infrastructure, and other national security purposes, video surveillance and telecommunications equipment produced by Hytera Communications Corporation, Hangzhou Hikvision Digital Technology Company, or Dahua Technology Company (or any subsidiary or affiliate of such entities).

iii. Telecommunications or video surveillance services provided by such entities or using such equipment.

iv. Telecommunications or video surveillance equipment or services produced or provided by an entity that the Secretary of Defense, in consultation with the Director of the National Intelligence or the Director of the Federal Bureau of Investigation, reasonably believes to be an entity owned or controlled by, or otherwise connected to, the government of a covered foreign country.

C. For the purposes of this section, “covered telecommunications equipment or services” also includes systems that use covered telecommunications equipment or services as a substantial or essential component of any system, or as critical technology as part of any system.

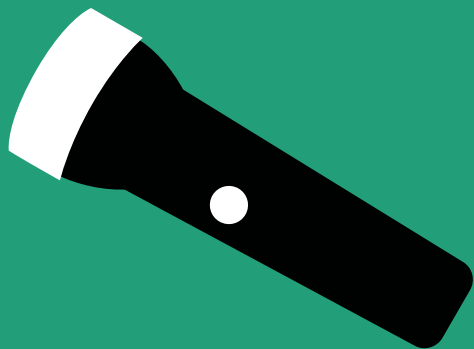
D. In implementing the prohibition under section 889 of Public Law 115-232, heads of executive agencies administering loan, grant, or subsidy programs shall prioritize available funding and technical support to assist affected businesses, institutions and organizations as is reasonably necessary for those affected entities to transition from covered communications equipment and services, to procure replacement equipment and services, and to ensure that communications service to users and customers is sustained.

E. CONTRACTOR certifies that it will comply with the prohibition on covered telecommunications equipment and services in this section. CONTRACTOR is not required to certify that funds will not be expended on covered telecommunications equipment or services beyond the certification provided upon accepting grant funding and those provided upon submitting payment requests and financial reports.

F. For additional information, see section 889 of Public Law 115-232 and 2 C.F.R. § 200.471.

## **EXHIBIT F**

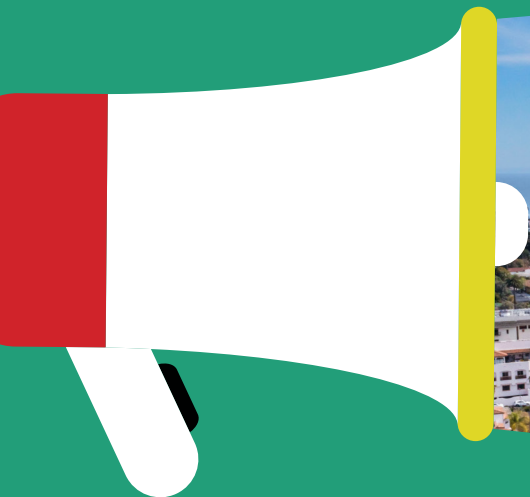
### **VENDOR'S ORIGINAL PROPOSAL**



# County of Santa Barbara

**ALL-HAZARDS EMERGENCY AND DISASTER  
PREPAREDNESS PUBLIC EDUCATION AND OUTREACH**

**OCTOBER 15, 2024**



**SOUTHWEST STRATEGIES GROUP**

San Diego • Los Angeles • Fresno • San Francisco





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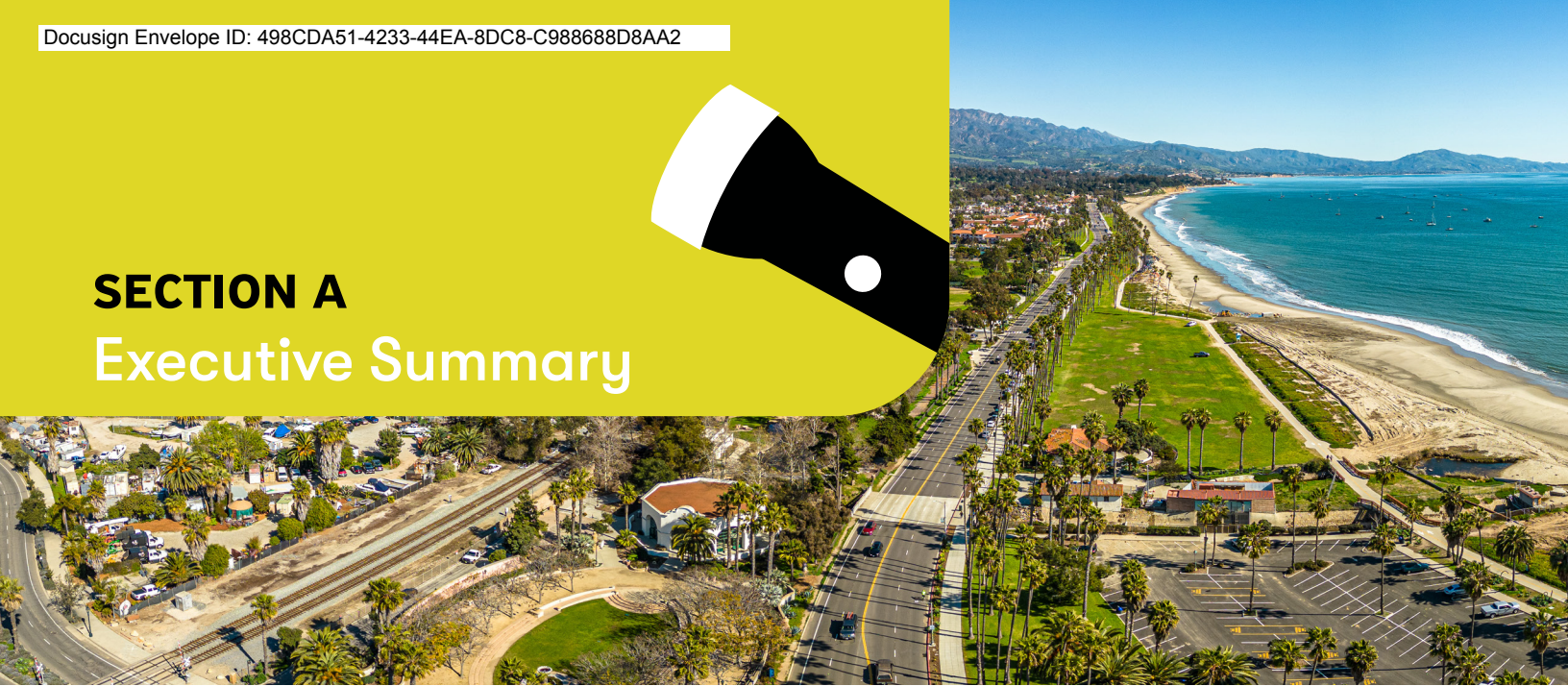
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## SECTION A

# Executive Summary



Southwest Strategies Group is pleased to submit the following proposal for the County of Santa Barbara's All-Hazards Emergency and Disaster Preparedness Public Education and Outreach. As Santa Barbara Office of Emergency Management (SBCOEM) aims to bolster public preparedness for a wide array of potential emergencies or disasters, our team is fully equipped to take on both project components: creating a "Train the Trainer" curriculum and Printed, Digital, and Multimedia Outreach Products.

Southwest Strategies Group brings an intimate understanding of the importance of this type of cooperation and preparation between agencies and the public. Our team has supported City Governments, utilities and public agencies through all manners of critical events and have seen firsthand the difference between managing a crisis where the public is prepared and where it is not. Our understanding of the pivotal role that community leaders and trusted voices play in disseminating preparedness messages informs our approach. By leveraging these relationships, we can effectively reach marginalized and hard-to-access audiences, enhancing overall community resilience.

## Understanding of the Project

Our team recognizes that effective crisis management relies on proactive public education. This approach ensures that partners within the community are equipped with the information and resources needed to carry the messages of emergency preparedness to the community. These efforts will be bolstered by a suite of accessible and informative communications materials and assets, the development of which is also outlined in the proposed approach. Through this combination of curriculum development and well produced resources, the County of Santa Barbara will be equipped to carry out its all-hazards emergency preparedness outreach and education in meaningful and effective manner.

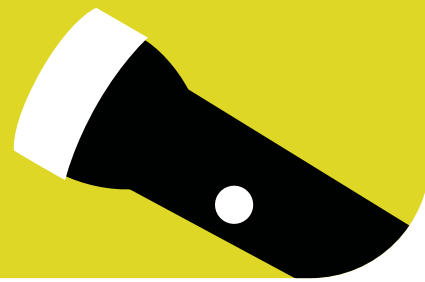
## Proposed Approach

To develop a successful curriculum and outreach program, we will implement the following steps:

- **Kickoff Session:** Initiate the project with a collaborative kickoff meeting to establish goals, review existing materials, and align key stakeholders.
- **Weekly Engagement Sessions:** Schedule regular strategy calls with SBCOEM to monitor progress and adapt to community feedback.

# SECTION A

## Executive Summary



- **Audit of Existing Resources:** Conduct a thorough review of current materials to identify gaps and opportunities for improvement.
- **Three-Phase Curriculum Development:**
  - Phase 1: Research and Preliminary Material Development
  - Phase 2: Listening Sessions and Feedback
  - Phase 3: Incorporate Feedback and Finalize Materials
- **Market Research:** Conduct research on best practices and lessons learned from emergency planning outreach and education in other markets to identify successful case studies and lessons learned that can be applied to efforts made in support of SBCOEM.
- **Target Audience Identification:** Develop a comprehensive list of stakeholders, including the public, community organizations, and advocacy groups, to tailor outreach efforts.
- **Materials Development:** Create accessible, culturally relevant training resources and public education materials, including:
  - Module-based presentations
  - Trainer guides and FAQs
  - Multimedia content (PSAs, print ads, infographics)
- **Listening Sessions:** Facilitate community feedback sessions across various demographics to ensure inclusivity and relevance.

## Project Management

Southwest Strategies Group commits to a transparent and collaborative project management approach, encompassing:

- **Clear Milestones:** Establishing a timeline with deliverables to maintain momentum.
- **Regular Reporting:** Monthly evaluations of outreach effectiveness and adjustments as necessary.
- **Record Keeping:** Implementing organized documentation processes for easy access and future reference.

By equipping community partners with the necessary tools and resources, we will effectively promote emergency preparedness and foster a culture of readiness across Santa Barbara County. Through this initiative, we anticipate not only improved public awareness but also enhanced collaboration between the government and its constituents, ultimately leading to a more resilient community in the face of emergencies.

As requested in the request for proposal we have included the qualifications of our firm and staff, technical approach, project management approach, DEI expertise and strategic approach, cost proposals, and overall compliance.





## SECTION B

# Qualifications of Firm and Staff

In this section Southwest Strategies Group has provided a description of relevant similar experiences by members of the project team. All similar experience examples are within the last three (3) years. We have also demonstrated having a minimum of 5 years' experience providing quality planning/consulting services in one or more of the following areas: community outreach; youth and adult education, training and learning principles; curriculum development; memorable and engaging message development and delivery; brand/identity creation; video production; ad and commercial script writing; graphic and multimedia design; web content development and management; social media marketing; organizing and facilitating of community forums and listening sessions; and/or public information and communication campaigns. On the following pages, we have showcased our relevant experience and knowledge of emergency and disaster preparedness public education and outreach campaign strategies, and experience working with vulnerable, underserved and hard-to-reach populations.



# SOCALGAS

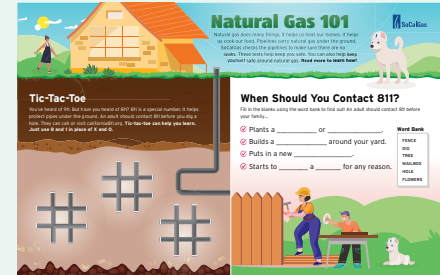
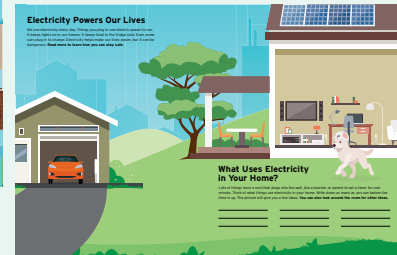
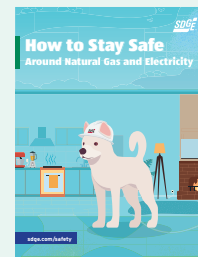
## Kid's Safety Campaigns

### PROJECT DESCRIPTION AND SERVICES PROVIDED

In 2018, SoCalGas hired Southwest Strategies to develop a series of print materials to educate elementary school-aged children about gas and electric safety in a fun and engaging manner. As a first step, Southwest Strategies' creative department designed characters and an overall look and feel that appealed to kids while maintaining consistency with brand colors. The campaign also incorporated Helmet, SoCalGas's existing safety mascot, to share important safety messages about calling 811, signs of a gas leak and staying away from power lines. Our team worked to develop messaging and a range of activities such as word searches, mazes and coloring pages that were accessible for young readers. We then created two placemat-style activity sheets for grades K-3 and 4-6, a booklet for all grades, social media advertisements, and introductory copy for SoCalGas's educational resources web page, as well as Spanish translations.

Following the success of this initial campaign, Southwest Strategies was tasked with creating a second set of Arbor Day materials. Messaging focused on planting the right tree in the right place, calling 811 before digging, and minding the lines above. Using age-appropriate language, Southwest Strategies created an informational fact sheet with a power line safety checklist and activity booklets for grades K-3 and 4-8. Characters used for the Arbor Day campaign followed the same look as the gas and electric safety materials to ensure consistency across programs.

A third campaign, launched in early 2020, was designed to educate children about emergency preparedness and safety using reassuring language. Southwest Strategies created a message platform to guide development of the materials and ensure an appropriate reading level for all elementary school grades. Our team then prepared activity content and designs that communicated the importance of making and practicing an emergency plan, creating a supply kit, and getting homes ready for an emergency with smoke alarms, fire extinguishers and more. This effort resulted in two activity sheets for younger and older elementary school grades, a booklet for K-6, and social media advertisements. All materials were also translated into Spanish.



### MEMBERS OF PROSPECTIVE CONTRACTOR TEAM ASSIGNED TO PROJECT

Jessica Luternauer

### TOTAL PROJECT COST

\$39,500

### TOTAL COST OF SERVICES PROVIDED

\$39,500

### PROJECT START DATE AND COMPLETION DATES

2018 - 2022

### BUDGET AND SCHEDULE PERFORMANCE

All project components were completed within the time frame and budget.

### REFERENCE INFORMATION

Kurtis Foster

Public Awareness Advisor

SoCalGas

213-231-7172

KFoster@socalgas.com

1801 S. Atlantic Blvd.

Monterey Park, CA 91754



## SOCALGAS

# Kid's Safety Campaigns

With the emergency safety materials complete, the team received feedback that suggested the need for an interactive online experience designed for children learning remotely during the COVID-19 pandemic. The Southwest Strategies team worked to convert the print activities into digital puzzles and games, which were tested by teachers and students prior to the website launch. Completed in October 2022, the interactive website featured animated characters, voiceovers and a variety of activities, including crossword and jigsaw puzzles, word scrambles, quizzes, and memory games. We also created a Spanish language website and worked to ensure both websites were ADA compliant. The two sites were promoted via email and social media, garnering more than 5,000 visits in the first three months.



# SANDAG

## 2021 Regional Plan



### PROJECT DESCRIPTION AND SERVICES PROVIDED

Southwest Strategies was hired by the San Diego Association of Governments (SANDAG) to assist in extensive public outreach support to ensure a successful adoption of the 2021 Regional Plan – a transformative vision for the future of the San Diego region. SWS began outreach for the 2021 Regional Plan in 2018, which was a very different time for public engagement. This Plan is required by federal and state law to be updated every four years, to consider how land use, transportation, technology, infrastructure, open space, and the environment will evolve to meet the region's growing and changing needs. We supported SANDAG through each draft of this comprehensive plan, ensuring the public was educated and engaged at each step of the way.

In 2020, outreach changed. SWS had to pivot to outreach in a digital world. Standard public outreach was no longer possible. Once the world opened up again and digital participation dropped, SWS had to find new ways to meet the public where they're at. On top of all the outreach challenges was communicating often technical language that only transportation wonks might know into simple terms that the average San Diegan would easily understand and resonate with. Once adopted in December 2021, we continued our partnership with SANDAG to aid in outreach for the implementation process of the projects outlined in the 2021 Regional Plan.

SWS set out to reach everyone in the San Diego region 7 different times in 7 different ways. SWS saw the 2021 Regional Plan through many different project milestones, keeping equity at the center. In total, more than 6,700 surveys were completed throughout the course of outreach. Utilizing the ladder of engagement method, our team coordinated: Media relations, Collateral development (fact sheets, FAQs, e-toolkits and more), A multi-faceted digital media campaign to grow engagement, educate the public on the Plan and key milestones, and ultimately collect accurate and valuable input from San Diego resident, more than 20 informational videos, hundreds of social media post, and worked with a network of community-based organizations to get the word out.

### MEMBERS OF PROSPECTIVE CONTRACTOR TEAM ASSIGNED TO PROJECT

Timothy Howland & Eddie Villanueva

### TOTAL PROJECT COST

\$3,323,565

### TOTAL COST OF SERVICES PROVIDED

\$3,323,565

### PROJECT START DATE AND COMPLETION DATES

2018 - 2021

### BUDGET AND SCHEDULE PERFORMANCE

All project components were completed within the time frame and budget.

### REFERENCE INFORMATION

Tedi Jackson

Former Manager of Public Outreach and Engagement

San Diego Association of Governments (SANDAG)

760.580.4630

tedi.jackson@cox.net

1025 Birch Avenue

Escondido, CA 92027

# SANDAG 2021 Regional Plan

Strategy then shifted to preparing for the Board of Directors vote on the Plan. Outreach included both digital and in-person outreach. Outreach efforts were committed to equity and focused heavily on reaching underserved and multicultural communities in the San Diego region. Our team was able to coordinate 75 community events, almost half of which occurred in a three-month time period around a key milestone, managed a team of community ambassadors to enhance SANDAG's outreach in each of San Diego County's five subregions, coordinated media relations which generated over 400 stories in the media, and coordinated more than 20 innovative partnerships to reach San Diego residents in new and different ways, working with beloved local institutions including the Padres, Gulls, Zoo Wildlife Alliance, Circuit Free Ride, Automotive Museum and more to further drive awareness.

As part of our communications and outreach program supporting SANDAG's Regional Transportation Plan, Southwest Strategies was tasked with engaging Community Based Organizations (CBOs) to activate community networks and individuals in the promotion of the Regional Transportation Plan and provide an increased awareness of the Plan's impact for the future of the region. Southwest Strategies recommended an approach to empower CBO organizations to independently lead outreach efforts in their communities by providing each CBO with a toolkit to guide their efforts and ensure outreach was consistent across all organizations.

This culminated in the SANDAG Board of Directors adopting the 2021 Regional Plan in December 2021, which ushered in a new era of multimodal transportation, equity, and prosperity throughout the region. All of this outreach garnered more than 35 million impressions—enough to reach every San Diego County resident about 11 times—to ensure all community members were informed and encouraged to participate. successfully understanding the region's needs by: creating avenues for community feedback through outreach strategies, aiding in the evolution of a robust, comprehensive plan, acquiring approval from the Board of Directors, and implementing the various aspects of the plan while maintaining constant engagement with the region and strategic partners. Our working group was so well received that we were asked to extend our contract to further aid in ongoing implementation efforts as outlined in the Regional Plan.

**FORWARD SANDAG**  
**ATTEND A DRAFT 2021 REGIONAL PLAN VIRTUAL OPEN HOUSE!**

Join SANDAG at a virtual open house to learn about the draft 2021 Regional Plan and benefits for your community. The 2021 Regional Plan is a long-term blueprint for the San Diego region that seeks to improve quality of life, address social inequality, and preserve our environment for generations to come.

During the virtual open houses, SANDAG Board Members and staff will talk through details presented in the draft 2021 Regional Plan. The open houses will include presentations and an opportunity for you to share your comments about the plan.

**LEARN MORE ABOUT TOPICS SUCH AS:**

- A reimagined transportation system
- Innovative technology solutions
- Land use, housing, and climate change
- Flexible fleets, safety, and rural mobility
- Social equity focused improvements
- Policies, programs, and partnerships

**Join any open house from your computer, tablet, or phone to learn more and find out ways to get involved!**

Register for the virtual open houses via Zoom link: [sandag.org/2021regionalplan](https://sandag.org/2021regionalplan)  
Zoom ID: 867 835 6224

**Pick any of these dates in June to join!**  
Registration and participation in Spanish will be provided. Registration is not required.

Subregion	Dates and Times
North County Coastal	Tuesday, June 15, 2021, 6-8 p.m.
County Unincorporated	Wednesday, June 16, 2021, 6-8 p.m.
South County	Tuesday, June 22, 2021, 6-8 p.m.
East County	Thursday, June 24, 2021, 6-8 p.m.
North County Inland	Monday, June 28, 2021, 6-8 p.m.
Central San Diego	Wednesday, June 30, 2021, 6-8 p.m.

**Join any open house from your computer, tablet, or phone to learn more and find out ways to get involved!**

Register for the virtual open houses via Zoom link: [sandag.org/2021regionalplan](https://sandag.org/2021regionalplan)  
Zoom ID: 867 835 6224

The draft 2021 Regional Plan is available for public review and comment from May 28-August 6, 2021. You can comment on the draft 2021 Regional Plan at virtual public meetings during the month of July. SANDAG Transportation Committee Meeting: Friday, July 16, 2021, 9 a.m. SANDAG Board of Directors: Friday, July 23, 2021, 9 a.m. Comments are also accepted: Online: [sandag.org/RegionalPlanComments](https://sandag.org/RegionalPlanComments) Email: [SDPForward@sdag.org](mailto:SDPForward@sdag.org) or [SDPForward@sdag.org](mailto:SDPForward@sdag.org) Telephone: (619) 449-1854, Toll free: 877.277.5776 and TTY: (619) 449-1855 Fax: (619) 449-0965 Mail: 4401 2021 Regional Plan, SANDAG, 400 B Street, Suite 800, San Diego, CA 92101

For more information, visit [sandag.org/2021regionalplan](https://sandag.org/2021regionalplan)

**2021 REGIONAL PLAN**  
**A REIMAGINED TRANSPORTATION SYSTEM**

**Learn more today!**  
We want to hear from you! Public comments for the draft 2021 Regional Plan are accepted through August 6!

**San Diego FORWARD SANDAG**

[SDForward.com](https://SDForward.com)

**2021 Regional Plan** **San Diego FORWARD**

**STRATEGIES**  
Achieving our goals requires regional coordination on three core strategies:

- Invest in a reimagined transportation system**
- Incentivize sustainable growth and development**
- Implement innovative demand and system management**

**SANDAG**



# PG&E Community Resource Center Staffing

## PROJECT DESCRIPTION AND SERVICES PROVIDED

In 2020, PG&E retained Southwest Strategies to support Community Resource Center (CRC) logistics for Public Safety Power Shutoff (PSPS) events. This includes recruiting, hiring and training of approximately 1,000 staff to serve at CRC sites during PSPS or other adverse weather event including All-Hazards events. Our team focused on a train the trainer approach to ensure that the CRC staff would be prepared in any all-hazards situation and know how to interact with and aid the public to make the centers successful. Recruitment efforts span the utility's 70,000 square mile service territory, with a focus on additional language skills and candidates who can easily travel to areas impacted by power outages, including rural areas. Working closely with PG&E, our team developed a virtual training path for staff including tips for working with concerned visitors and up-to-date guidance on how to navigate COVID-19 protocols.

Southwest Strategies deploys staff to impacted locations within 1 to 2 days of notification of a potential event. Our team coordinates with staff in the field and provides real-time reporting to ensure proper inventory levels are maintained and PG&E leadership is up to date on visitor levels and sentiment. Southwest Strategies supported six all-hazards events in 2020 with more than 200 CRC sites and 49,000 visitors served. Since then, our team has supported six events in 2021, three events in 2022, three events in 2023 and three events (so far) in 2024.



## MEMBERS OF PROSPECTIVE CONTRACTOR TEAM ASSIGNED TO PROJECT

Seleyna Mendoza

## TOTAL PROJECT COST

\$3,554,329

## TOTAL COST OF SERVICES PROVIDED

\$3,554,329

## PROJECT START DATE AND COMPLETION DATES

2020 – 2024

## BUDGET AND SCHEDULE PERFORMANCE

All project components were completed within the time frame and budget.

## REFERENCE INFORMATION

Chris Bober

Director, Customer Emergency  
Planning and Operations

415-407-4358

cfb5@pge.com

300 Lakeside Drive  
Oakland, CA 94612



# FRESNO COUNTY DEPARTMENT OF ELECTIONS

## Voter's Choice Act

### PROJECT DESCRIPTION AND SERVICES PROVIDED

In 2019, the Fresno County Department of Elections retained Southwest Strategies to conduct branding, communications, community outreach and media relations services to educate the public about its transition to a Voters Choice Act (VCA) voting model for the March 3, 2020 primaries. Passed by the California State Legislature in 2016, VCA voting replaced the traditional precinct model with vote by mail ballots for all registered voters that can be returned by mail free of postage or dropped off at vote centers or drop boxes throughout the county.

This project required extensive engagement and coordination with elected officials, Fresno County staff and public committees focused on inclusive outreach and engagement for this effort. Southwest Strategies began by working with several committees of multicultural Fresno County stakeholders to prepare branding, a logo and a tagline that effectively conveyed the changes from a traditional precinct election model to a vote center model. Our team ultimately created the tagline "Mail it. Drop it. Visit." to convey to the public how to vote using their vote by mail ballots. Our team also worked with the County's translators to prepare all collateral materials in languages required by the California Secretary of State, including Spanish, Hmong, Punjabi, Khmer, Korean, Chinese, Tagalog and Vietnamese.

From there, our team prepared and implemented a comprehensive public outreach, education and media relations campaign. This included multilingual Facebook ads, newspaper ads and digital billboards in prominent locations; fact sheets and other collateral materials specific to particular neighborhoods and underserved communities in the County; a digital public service announcement that was translated and ran on local TV and public access channels; and an extensive earned media campaign. In 2022, Southwest Strategies worked with the Fresno, Madera and Merced County clerks to develop a public service announcement educating communities about vote by mail ballots ahead of the June primary election.

Through these efforts, SWS helped equip local officials and community leaders with the tools they needed to inform the public effectively, contributing to a smooth and successful rollout of the VCA voting model in Fresno County.



### MEMBERS OF PROSPECTIVE CONTRACTOR TEAM ASSIGNED TO PROJECT

Jessica Luternauer

### TOTAL PROJECT COST

\$135,342.50

### TOTAL COST OF SERVICES PROVIDED

\$135,342.50

### PROJECT START DATE AND COMPLETION DATES

2019 – 2022

### BUDGET AND SCHEDULE PERFORMANCE

All project components were completed within the time frame and budget.

### REFERENCE INFORMATION

James Kus  
County Clerk/Registrar of Voters  
Fresno County  
jkus@fresnocountyca.gov  
559-600-1730  
2221 Kern St.  
Fresno, CA 93721

# CITY OF SANTA BARBARA

## Water Conservation Campaign

### PROJECT DESCRIPTION AND SERVICES PROVIDED

In 2023, the City of Santa Barbara Public Works Department retained Katz & Associates, a Southwest Strategies Company to conduct a creative, integrated marketing campaign to raise awareness of water conservation as a way of life and promote the City's water conservation rebates. Given the erratic weather conditions experienced in early 2023 and the confusion around the status of current and future water supply conditions, clear messaging around conservation as an ongoing way of life in Santa Barbara was needed.

Our team began by developing a comprehensive creative strategy centered around the tagline "Easy on the Eyes: Waterwise" to promote the City of Santa Barbara's rebate programs. Our team started by crafting this catchy tagline and a compelling creative theme alongside key messaging that underscored the dual benefits of water conservation and maintaining beautiful landscapes through the available rebates. After solidifying the creative theme, we recommended a strategic campaign approach to maximize reach across various platforms, effectively engaging the diverse target audience with relatable and impactful content. This included a targeted mix of digital, print and broadcast media.

To bring the campaign to life, we produced a range of creative assets in both English and Spanish, ensuring the message resonated with the community's demographics. These deliverables included social media graphics, radio ad scripts, print ads, posters, postcards, lawn signs and display ads. Additionally, we supported the creation of a City TV ad, ensuring cohesive branding and consistency across all channels. The "Easy on the Eyes: Waterwise" campaign successfully promoted water conservation and the City's rebate programs with clear, visually appealing and community-focused messaging.



### MEMBERS OF PROSPECTIVE CONTRACTOR TEAM ASSIGNED TO PROJECT

Monica Gil dos Santos

### TOTAL PROJECT COST

\$49,920

### TOTAL COST OF SERVICES PROVIDED

\$49,920

### PROJECT START DATE AND COMPLETION DATES

2023 – 2024

### BUDGET AND SCHEDULE PERFORMANCE

All project components were completed within the time frame and budget.

### REFERENCE INFORMATION

Erika Chan

Water Resources Specialist

City of Santa Barbara, Public Works

805-560-7556

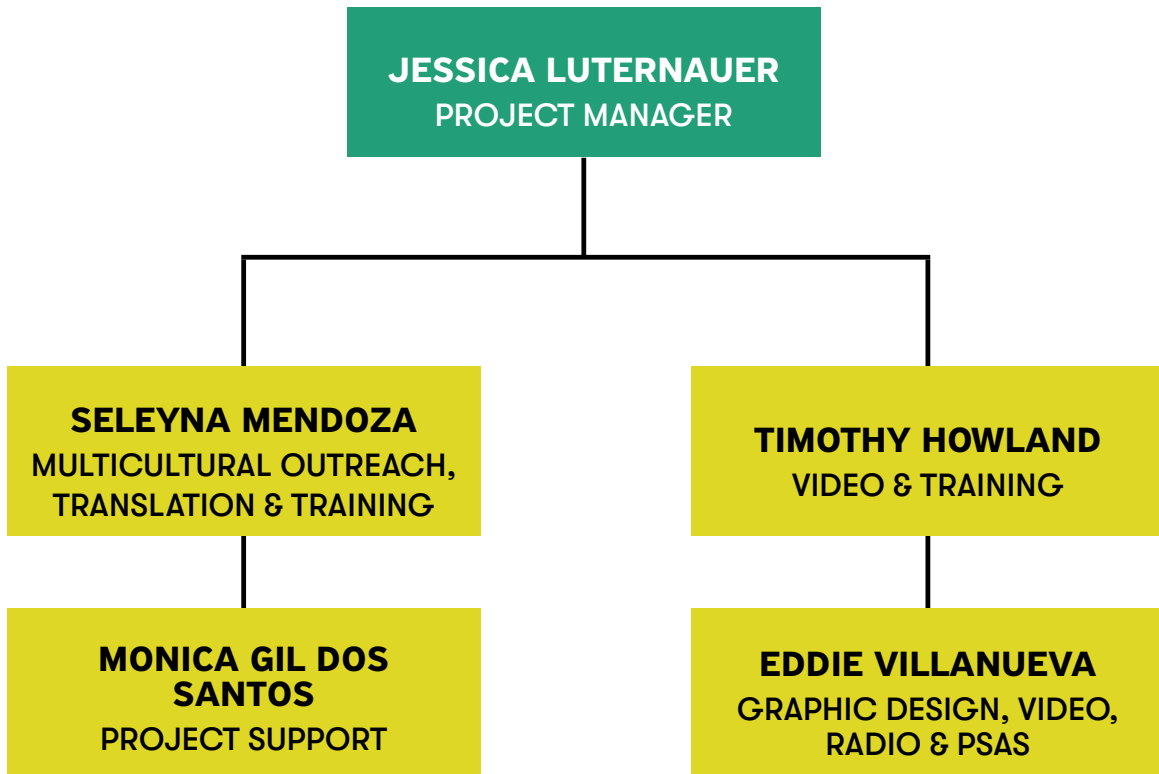
EChan@SantaBarbaraCA.gov

630 Garden St

Santa Barbara, CA 93101

## B. Qualifications of Firm and Staff

### Proposed Project Team Matrix





## **SECTION B**

# Terminated Contracts

Southwest Strategies Group has no terminated contracts to disclose.



## SECTION C

# Technical Approach

As the Santa Barbara County Office of Emergency Management (SBCOEM) embarks on its efforts to bolster public preparedness for a wide array of potential emergencies or disasters, the development of a comprehensive train the trainer curriculum and accessible suite of public outreach and communications materials is essential for ensuring success and encouraging public adoption of essential preparedness activities.

Critical events, emergencies or disasters can only be effectively managed through effective preparedness. When disaster strikes, an effective plan and the preparation work that goes into it can mean the difference between chaos and order. Times when lives are at stake in moments of crisis are the last time to educate people regarding how the government will respond. That is why effective and proactive public outreach and education is so important. The government can prepare, practice and plan, but if the public is not engaged, failure can still happen. By bringing the public into the preparedness efforts for hazardous events of all types, the government and the public can have aligned expectations and an understanding of how certain events will be responded to.

Southwest Strategies Group has an intimate understanding of the importance of this type of cooperation and preparation between agencies and the public. Our team has supported City governments, utilities and public agencies through all manners of critical events and has seen firsthand the difference between managing a crisis where the public is prepared and where it is not.

Through this experience, we have built an understanding of how partnerships with community leaders and trusted voices can carry the messages of preparedness further than any other mechanism. The public responds to information from trusted voices they turn to for information, and by leveraging this channel of information, marginalized or otherwise hard to reach audiences can be engaged more effectively, thereby improving their preparedness and the government's ability to respond effectively in times of need.

Below is a proposed approach for the development of a train the trainer curriculum that is developed in conjunction with public input and feedback. This approach ensures that partners within the community are equipped with the information and resources needed to carry the messages of emergency preparedness to the community. These efforts will be bolstered by a suite of accessible and informative communications materials and assets, the development of which is also outlined in the proposed approach. Through this combination of curriculum development and well produced resources, the County of Santa Barbara will be equipped to carry out its all hazards emergency preparedness outreach and education in a meaningful and effective manner.

### PROGRAM KICK-OFF AND MANAGEMENT APPROACH

To achieve the objectives indicated in the County of Santa Barbara's RFP, our team has identified the following work plan. We have also included the anticipated timeline for



## C. Technical Approach

each tactic that assumes a November 1, 2024, start date. This schedule is subject to change based on your feedback and depending on the official start date if we are selected.

**Hold Kickoff Session:** For all of our client work, we begin with a kickoff session between our team and the client to understand goals and objectives for each program, review existing messaging and collateral materials, discuss key stakeholders, evaluate lessons learned from prior work, and discuss any other pertinent details to inform our work. These serve as the foundation for our project work and help us gain essential foundational knowledge to inform the project moving forward.

### **Schedule Weekly Project Team Engagement Sessions:**

We will coordinate with the SBCOEM internal team to schedule weekly strategy calls to discuss program rollout, community relations, and updates to the project timeline. This will ensure leadership is engaged with the change initiative and give them opportunity to effectively lead the effort.

**Audit of Materials and Resources:** Our team will work with the SBCOEM internal team to identify and align on program goals and objectives, key metrics and performance measures. This will include an audit of existing materials, training, resources and other programmatic assets. This will prepare our team with an understanding of existing resources and program needs. Anticipated needed data or other items and/or resources that will be required from Santa Barbara County, SBCOEM, partner jurisdictions and any non-governmental entities include stakeholder lists, contact information, existing libraries of photos and video, existing emergency preparedness materials, messaging and communications, past advertisement materials and anything pertaining to ReadySBC programmatic materials. Additional needs will be compiled following the initial kickoff session.

**Program Deliverables List and Timeline:** We will take the information gathered in the initial audit to develop a comprehensive deliverables list alongside a robust timeline for the completion of tasks identified under the program. This will likely follow a three-phase process outlined in more detail in the Program Management section of this RFP response. This three-phased approach will include:

1. Phase 1: Research and Preliminary Material Development
2. Phase 2: Listening Sessions and Feedback
3. Phase 3: Incorporate Feedback and Finalize Materials

**Market Research:** We will conduct research on best practices and lessons learned from emergency planning outreach and education in other markets to identify successful case studies and lessons learned that can be applied to efforts made in support of SBCOEM. Southwest Strategies Group will also include an assessment of our best practices and lessons learned from prior experience on similar projects.

**Identify Target Audiences:** Based on information garnered during the project kickoff and initial market research, our team will prepare a comprehensive list of target audiences based on the analysis and input from SBCOEM internal staff and community partners. The following represent audiences to be engaged and reached during this process to help engage the public and increase awareness. These audiences could include, but are not limited to:

- The general public in urban and rural Santa Barbara County
- Incorporated Cities, Offices of Emergency Services
- Social and environmental justice advocacy groups
- Culturally diverse communities and multicultural organizations
- Local, state and federal elected officials and government staff, including municipalities
- Community non-profits, religious institutions, neighborhood groups, healthcare providers and advocacy organizations

### **Development of “Train the Trainer” Community**

**Education Curriculum Materials:** Our team will begin to develop a comprehensive “Train the Trainer” curriculum that will equip community partners and potential trainers with everything they need to engage the public and conduct effective public outreach on behalf of SBCOEM. This curriculum will include but not be limited to:

- **Message Platform** – Following the completion of the kick-off session, market research and the audit

## C. Technical Approach

of existing materials and resources, our team will develop a message platform composed of primary and secondary messages. These messages will be developed in alignment with the SBCOEM project team. Supplementary project-specific message platforms may also be needed to communicate benefits associated with a particular effort to ensure culturally inclusive information, depending on the audience.

- **Module-based Training Presentation** – Our team will develop a presentation deck that can be modified in length and content to adjust the training approach depending on the audience. This will include a core content suite of slides that will be used in every engagement, community-specific slides (where applicable) for regional detailed information, highly visual information distilled to the core premise of the presentation, information laid out in an accessible, 5th grade reading level and a condensed module that can be used to supplement an informal presentation.
- **Trainer Talking Points** – Talking points will be developed to accompany the training presentation and formatted in a way to support the different modules and presentation lengths. These talking points will meet the same accessibility and 5th grade reading levels of the slides. For Spanish and Mixteco talking points, culturally specific edits will be applied to ensure the translations make sense and convey the messaging and information appropriately.
- **Question and Answer Document** – A thorough and robust document will be prepared with a series of any and all anticipated questions trainers may encounter at presentations. These will take into account the module-based approach and the same accessibility standards will be applied to ensure consistency.
- **Fact Sheets** – Fact sheets to accompany and support training sessions will be developed to support trainers with resources and information that they can distribute in training sessions to equip the community with information they can take home. The same accessibility standards will be applied to ensure consistency with all other training materials.
- **Promotional Social Media Content** – Draft social media copy and visuals will be prepared to equip community partners with a tool to promote training sessions among their audiences and communities.
- **Promotional Newsletter Content** – Draft newsletter copy and images will be developed that community

partners can use to promote trainings and public education messaging in owned and third-party newsletters.

- **“Training in a Box” Equipment and Checklist** – We will develop an event plan and checklist for community partners to use to prepare for training sessions and ensure they have the equipment they need to facilitate a successful training. This will include details including but not limited to: name tags, projector, screen, extension cord, power strip, markers, fact sheet print outs, etc.

### Development of Printed, Digital and Multimedia

**Outreach Products:** We will develop a suite of products that promote SBCOEM objectives and ReadySBC alert registration. These products will be developed to build upon existing materials and messaging, alignment with the “Train the Trainer” curriculum and to meet culturally specific and accessibility standards. This suite of materials will include but is not limited to:

- Three Public Service Announcement (PSA) videos in English, Spanish and Mixteco
- Three traditional streaming radio spots in English, Spanish and Mixteco
- Two print and digital ads promoting ReadySBC alert registration
- Six to eight “blue skies” emergency preparedness message scripts in English and Spanish for County-operated AM radio stations
- Brochures
- Fliers
- Social media infographics
- Digital media images and program infographics
- Posters and magnets

All products will be developed to promote messaging and information in a clear and concise manner to ensure effective and accessible communications. For Spanish and Mixteco language products, culturally specific edits will be applied to ensure the translations make sense and convey the messaging and information appropriately. Products will follow best practices for the medium of delivery and will meet accessibility and 5th grade reading level standards.



## C. Technical Approach

**Listening Sessions:** We will plan, coordinate and facilitate listening sessions in conjunction with community partners to solicit feedback from the community and potential trainers to optimize the “Train the Trainer” curriculum and the printed, digital and multimedia products. In order to ensure effective engagement and participation in these sessions, we will partner with organizations such as the Independent Living Resource Center, Mixteco Indigena Community Organizing Project (MICOP), Adult and Aging Network, Listos Santa Barbara, faith-based organizations, and others to solicit initial feedback on training curriculum and public outreach products as well as coordinate listening session logistics. Upon feedback and coordination with community partners, we will develop a community engagement plan outlining our approach for executing the listening sessions that outlines:

- Listening session schedule and timeline
- Venue selection and required logistics
- Staffing plan for facilitating listening sessions, including contact information
- Required materials and equipment list
- Event run of show
- Listening session promotion plan
- English- and Spanish-language listening sessions will be coordinated in the following communities:
- Santa Maria
- New Cuyama
- Lompoc/Santa Ynez Valley
- Santa Barbara/Carpinteria

A Spanish and Mixteco language listening session will be coordinated in the Santa Maria Valley.





## SECTION D

# Project Management Approach



The Southwest Strategies Group project team is committed to providing the highest quality products and services. This requires prioritizing clear expectations, resources, project management, and an established review and approval process to ensure successful delivery. Working with the SBCOEM internal team we recommend an approach that follows a team mentality and collaboration to ensure all opinions and preferences are heard and incorporated when possible.

We also know that all outreach strategies are not created equal, and we are committed to understanding the communication objectives and audiences before recommending tactical solutions.

We are committed to following a project management approach that includes budget management and cost balancing measures in everything we do, including:

- Assigning the right labor classification for the right task. We will always ensure that senior level team members are participating in strategic planning and offering counsel and that junior level team members are planning and executing tasks with proper oversight.
- We receive direction to proceed before beginning an assignment to avoid any unnecessary re-work or abandoned work products.
- We establish timelines up-front to chart a clear, agreed-upon path forward for each initiative.
- We receive approval before incurring any direct costs.

To execute the tasks outlined in this RFP we propose the following project management tactics to ensure we are meeting project objectives and goals.

**Hold Kickoff Session:** Before the development of any materials we will schedule, coordinate and facilitate a kickoff session between our team and the client to understand goals and objectives for each program, discuss anticipated milestones and events that will affect the timeline of deliverables and activities and build a initial list of action items that will be used to develop an initial deliverables list and timeline that will structure the project

management approach moving forward.

**Weekly Project Team Engagement Sessions:** We will schedule, coordinate and facilitate weekly meetings with the SBCOEM internal team to discuss program rollout, community relations, and updates to project timeline. This will ensure leadership was engaged with the change initiative and gave them opportunity to effectively lead the effort.

**Program Deliverables List and Timeline:** We develop, update and regularly report on a comprehensive deliverables list alongside a robust timeline for the completion of tasks identified under the program that will track progress and execution of key tasks.

## RECORD KEEPING

In partnership with SBCOEM, we will work to determine the record keeping and document storage process. If needed, Southwest Strategies Group has the capability to securely store signed agreements, both physically and digitally. We can ensure all agreements and additional documentation are in one place and easily accessible for future reference.

## METRICS AND REPORTING

Southwest Strategies Group understands the complexities of these types of efforts and is familiar with tracking activities on an ongoing basis to ensure that the project achieves the goals. This includes:

- **Program Evaluation and Progress Meetings:** Southwest Strategies will evaluate the SBCOEM on an ongoing basis and make adjustments where needed to maximize each program's reach. We will provide SBCOEM with a monthly report that quantifies the outreach conducted, assesses the effectiveness of these tactics and provides recommendations. In addition, Southwest Strategies Group team members will participate in progress meetings to discuss tasks completed, identify strategies for next steps and determine upcoming milestones and activities. Deliverables will include agendas, notes, and follow-up action items.

## D. Project Management Approach

- **Training Database:** We will regularly track activity and participation across all training sessions and compare to training lists developed with project leaders. This will include monitoring and reporting on trainings and outreach in the community through regular touch points with partners to compare training attendance with the amount of work being completed in the field.
- **Office Hour Sessions:** Southwest Strategies Group will host weekly open office hour sessions after training where community partners could come ask specific questions or provide input on specific information and resources.
- **Final Report:** Once all work has concluded, Southwest Strategies Group will work with SBCOEM to develop a report showcasing significant accomplishments, highlighting community engagement, and outlining performance and achieved goals.

### PROJECT DELIVERY SCHEDULE

Below is a proposed timeline of activities and key deliverables as outlined in the RFP. This schedule is based upon an assumed start date of November 1 and is subject to changes based on immediate needs, community partner availability and other unforeseen circumstances.

- **November 1, 2024** – Contract Execution
- **Phase 1:** Research and Preliminary Material Development
  - **November 4-8, 2024** – Research best practices and lessons learned from emergency planning outreach and education in other markets
  - **November 11/12** – Kickoff session
  - **November 13/14** – Development of program deliverables list and timeline
  - **November 15-December 6** – Initial material development
    - ▶ Initial curriculum materials to include but not limited to module-based training presentation, trainer talking points, question and answer documents, fact sheets, “training in a box” equipment and checklist, promotional social media content, promotional newsletter content, etc.
    - ▶ Initial printed, digital and multimedia outreach products including but not limited to: three Public Service Announcement (PSA) videos in English, Spanish and Mixteco; three traditional streaming radio spots in English, Spanish and Mixteco; two print and digital ads promoting ReadySBC alert registration, six to eight “blue skies: emergency preparedness message” scripts in English and Spanish for County-operated AM radio stations; brochures; fliers; social media infographics; digital media images and program infographics; posters and magnets.
- ▶ Target audience heat map and trainer list.
- ▶ Listening session schedule and plans, including potential venue locations.
- **Phase 2:** Listening Sessions and Feedback
  - **December 9-13** – Coordinate internal SBCOEM reviews of developed curriculum and printed, digital and multimedia outreach products
  - **December 9-18** – Coordinate and facilitate reviews with community-based partner organizations such as the Independent Living Resource Center, MICOP, Adult and Aging Network, Listos Santa Barbara, faith-based organizations, and others to solicit initial feedback on training curriculum and public outreach products, as well as coordinate listening session logistics
  - **December 18-January 30** – Plan, coordinate and facilitate English/Spanish community listening sessions in Santa Maria, New Cuyama, Lompoc/ Santa Ynez Valley and Santa Barbara/Carpinteria to solicit feedback on training curriculum and public outreach products
  - **December 18-January 31** – Plan, coordinate and facilitate Spanish/Mixteco community listening session in Santa Maria Valley to solicit feedback on training curriculum and public outreach products
- **Phase 3:** Incorporate Feedback and Finalize Materials
  - **February 3-7** – Compile feedback and recommendations from community partners into an assessment memo outlining the needed adjustments or additional assets
  - **February 7-14** – Coordinate and align with internal SBCOEM on revisions and feedback for developed curriculum and printed, digital and multimedia outreach products

## D. Project Management Approach

- **February 14-28** – Update curriculum materials to include but not limited to: module-based training presentation, trainer talking points, question and answer documents, fact sheets, “training in a box” equipment, promotional social media content, promotional newsletter content, etc.
- **February 14-28** – Update printed, digital and multimedia outreach products including but not limited to: three Public Service Announcement (PSA) videos in English, Spanish and Mixteco; three traditional streaming radio spots in English, Spanish and Mixteco; two print and digital ads promoting ReadySBC alert registration, six to eight “blue skies: emergency preparedness message” scripts in English and Spanish for County-operated AM radio stations; brochures; fliers; social media infographics; digital media images and program infographics; posters and magnets
- **February 28** – Finalize curriculum and printed materials and secure SBCOEM approvals
- **February 28** – Develop, coordinate and execute centralized material distribution process

## D. Project Management Approach



### Jessica Luternauer

#### SENIOR VICE PRESIDENT & PARTNER

#### AREAS OF EXPERTISE

- Project Management
- Strategic Planning
- Research and Messaging

#### EDUCATION

- M.A. Literatures In English, UC San Diego
- B.A. English, UC Santa Barbara

#### AFFILIATIONS

- Public Relations Society of America
- Phi Beta Kappa

#### AWARDS

- Business Street Online 40 Under 40, 2016
- 2019 MarCom Platinum Award, Comm/PR/Communication Plan (Fresno Housing)
- 2015 PRSA Silver Anvil Award of Excellence, Issues Management

Jessica Luternauer is an award-winning professional with more than 16 years of experience in energy-related outreach. She has helped renewable energy developers, gas and electric utilities, and other clients achieve their goals through strategic public outreach programs and compelling messages that communicate project benefits. Her expertise includes research, strategic planning, collateral development and project management. A graduate of UC Santa Barbara, Luternauer earned a master's degree from UC San Diego, where she taught writing and humanities. Her work has won local awards for public affairs, community relations, issues management and event planning, as well as three prestigious Silver Anvil Awards from the Public Relations Society of America. Luternauer manages Southwest Strategies' Central California office.

#### SELECT PROJECT EXPERIENCE

##### Enel Green Power North America (EGPNA), Jewel Valley Project

Luternauer served as project manager on EGPNA's Jewel Valley Project, a proposed wind and solar project in San Diego County. This effort involved research, message and collateral development, strategic planning, and community outreach to build third-party support. Supporters were mobilized to write letters and speak in favor of installing meteorological testing equipment at the site, ultimately winning approval from the Planning Commission. Luternauer also helped EGPNA introduce the Play Energy science fair to local schools, coordinating logistics and media outreach.

##### PG&E, Customer Communications

Luternauer has supported Pacific Gas and Electric Company's (PG&E) Customer Communications team since 2018. Her work includes the development of messaging, communications strategies and informational materials for the utility's gas and electric work. She also developed several award-winning educational campaigns for children, including print materials on gas and electric safety and an interactive website about emergency preparedness.

##### SDG&E, Sunrise Powerlink Transmission Line

Luternauer supported planning and outreach during permitting and construction of the Sunrise Powerlink, a controversial transmission line that required approval from the California Public Utilities Commission, Bureau of Land Management and Forest Service. She helped engage and mobilize a third-party coalition, the Community Alliance for the Sunrise Powerlink, to secure project approvals.

## D. Project Management Approach



### Timothy Howland

#### DIRECTOR OF PUBLIC AFFAIRS & PRINCIPAL DIGITAL STRATEGIST

#### AREAS OF EXPERTISE

- Project Management
- Digital Strategy
- Social Media Advertising

#### EDUCATION

- B.S. Psychology, Minor Political Science  
Susquehanna University

#### AFFILIATIONS

- Millie's Bookshelf
- San Diego World Affairs Council

#### AWARDS

- PRSA Silver Anvil Award, Public Affairs and Government Relations 2020
- PRSA Silver Anvil Award, Public Affairs and Government Relations, 2019
- PRSA of San Diego Edward L. Bernays Award - Silver Merit in Social/Digital Media, 2021
- PRSA of San Diego Edward L. Bernays Award - Silver Merit in Integrated Communications, 2021

Timothy Howland is the Director of Public Affairs and Digital Strategy at Southwest Strategies, guiding client public outreach campaigns. He has over a decade of experience assisting major industries and Fortune 500 corporations, including California Energy, Water and Transit associations, Verizon, AT&T, Walmart, and Google, with successful public outreach, government affairs campaigns, and change management initiatives.

Timothy serves as the principle digital strategist and marketing consultant for public affairs campaigns across the SWS portfolio, using his expertise in data analysis, forecasting, and social psychology to develop effective digital outreach models for all demographics and platforms. Utilizing custom built interactive dashboards and next-generation web tools, Timothy extracts meaningful information from the noise of big data for actionable and measurable client success.

Timothy is a certified Scaled Agile practitioner and leads lean deployments of project and program management software for several lines of business at Pacific Gas & Electric. He also serves as the co-facilitator of Public Meetings for the CPUC Energy Savings Shop Working Groups.

#### SELECT PROJECT EXPERIENCE

##### US Drug Enforcement Take-Back Day

Planned, developed, and executed a nationwide digital advertising plan to educate and drive residents to DEA Drug Takeback sites at Walmart locations nationwide, helping remove unneeded medications as a measure of preventing misuse and opioid addiction. The program successfully drove seventy-five times more engagements and 3.75 times more site visits than the previous year while navigating pandemic restrictions.

##### Falck San Diego

Developed multi-faceted digital outreach campaigns to build broad community support for Falck, USA as the preferred emergency health services provider in San Diego. Coordinated a diverse group of local Non-Profit Organizations, Community Based Organizations, and Community Leaders on co-branded content, events, and grassroots advocacy to support Falck's position.

## D. Project Management Approach



### Seleyna Mendoza

#### MANAGER OF PUBLIC AFFAIRS

#### AREAS OF EXPERTISE

- Event Coordination
- Community Outreach
- Bilingual Communication

#### EDUCATION

- M.S. Higher Education Administration, National University
- B.A. Mass Communications and Journalism, Fresno State

#### AFFILIATIONS

- PRSA

#### AWARDS

- CalSPRA Communication Tactics Award for Newsletter - February 2020 We Believe Newspaper
- CalSPRA Communication Special Events Recognition Awards - 2020

Seleyna is a Manager of Public Affairs at Southwest Strategies where she provides support to clients in the public and private sectors throughout the state. She is experienced in community engagement, event planning and media relations. Prior to joining Southwest Strategies, Mendoza held communications roles at Fresno County Superintendent of Schools and Madera Unified School District. She is an experienced media and communication professional with a bachelor's degree in mass communications and journalism with a focus on Public Relations and a master's degree in Higher Education Administration from National University.

Throughout her career, she has coordinated strategic marketing communications, including promotions, events, marketing, and public relations. As a result of her efforts, she received awards from the California School Public Relations Association. She is committed to helping clients reach their goals with clear and effective communication. Mendoza is confident in her ability to create meaningful connections between clients and their target audiences.

#### SELECT PROJECT EXPERIENCE

##### Mark Thomas, KARGO C-CAMS

Serve as Outreach Lead for the Kern COG KARGO C-CAMs project. Responsible for creating and executing the community outreach plan to maximize feedback and ensure communities were well-informed of the feedback opportunities developed for the project. Efforts include planning and coordinating logistics for community events, meetings and outreach efforts to educate and inform the public about the project and feedback opportunities.

##### Antelope Valley Union High School District, Strategic Plan

Serve as project coordinator for the development of the AVUHSD strategic plan. Responsibilities involved developing a concise, easy-to-understand strategic plan in coordination with the school district's goals and future plans. I assisted in developing the rollout timeline along with an implementation plan and message platform to help the district effectively communicate the strategic plan.

##### Madera County Transportation Commission, RTP/SCS

Serve as Outreach Lead and provide support on all outreach efforts to garner community feedback to develop the Madera County Transportation Commission RTP/SCS. Responsibilities include logistics coordination, event planning and collateral development.



## D. Project Management Approach



### Monica Gil dos Santos

#### ACCOUNT EXECUTIVE II

#### AREAS OF EXPERTISE

- Multilingual & Intercultural Communication
- Social Media Marketing
- Community Outreach
- Event Planning and Coordination
- Stakeholder Relations

#### EDUCATION

- Bachelor of Arts, Language, Literature, Culture, Justus-Liebig-Universität Giessen
- Master of Arts, Language and Communication, University of Mannheim

#### AFFILIATIONS

- Public Relations Society of America, San Diego and Imperial Counties Chapter 2022 Associate Board Member, Communications Committee
- Water For People San Diego

Monica Gil dos Santos is a communication specialist with international experience across various industries, including hospitality, finance, health, and government. She specializes in multilingual and intercultural communication, social media marketing, and stakeholder outreach and relations. She also has experience in event and vendor coordination, communication strategies and content creation.

Throughout her career, Monica has performed various marketing and communication roles, writing content for diverse channels and audiences such as newsletters, blogs, websites, social media, flyers, and other collaterals, developing and implementing communication and marketing strategies, and creating press releases and media briefings.

Having graduated with degrees in Language, Literature, Culture, and Language and Communication in English, German, French and Portuguese, Monica utilizes her multilingual communication skills and international background to inspire positive change for local and underserved communities.

#### SELECT PROJECT EXPERIENCE

##### Los Angeles County Public Works Water For LA

Water for LA is an ongoing water education platform that provides trusted information to the residents of LA County and inspires them to reevaluate and improve their relationship with water. The 2022 campaign focuses on the water journey, highlighting water conservation and pollution prevention. Monica serves as the Assistant Project Manager, managing and developing an integrated creative campaign, including several materials in English and Spanish, such as key messages, print ads, TV ads, radio ads, billboards, newsletters, website, and social media plans, and coordinating designs and vendors for various collaterals and merchandise items.

##### City of San Diego Stormwater Department, Think Blue Campaign

The City of San Diego Stormwater Department is responsible for building, operating and maintaining our city's large and complex stormwater system that lays the foundation for safe, sustainable and thriving San Diego communities. The Think Blue Campaign aims to lay the foundation to earn public support for enhanced investments in the stormwater system by educating the community about stormwater pollution, highlighting community benefits of stormwater pollution prevention, raising stormwater pollution awareness, generating broad support, and encouraging behavior change. In her role, Monica supports this effort with content creation for diverse communication channels, such as the website, social media, e-blasts, etc., social media management and vendor coordination.

## D. Project Management Approach



**Eddie Villanueva**  
**DESIGNER**

### AREAS OF EXPERTISE

- Adobe InDesign
- Adobe Illustrator
- Adobe Photoshop
- Figma
- UX/UI
- Adobe Premier
- Adobe After Effects

### EDUCATION

- B.A. Graphic Design and Marketing, California State University San Bernardino

Eddie Villanueva brings a passion for design as well as the desire to use his skills towards an innovative and useful purpose. Recognizing that exemplary design transcends mere aesthetics, Eddie champions functionality as paramount. Eddie believes that there is nothing more fulfilling than seeing companies grow through the power of design, and that is something he strives for in his everyday work. He is committed to staying current in the design landscape and constantly challenges himself to learn more.

Villanueva's design experience ranges from working as an inhouse designer at Competitor Group to working on a variety of design projects for Rock n Roll Marathon, VeloNews Magazine, Brooks Running, United Airlines and Westin Hotels. He also has an agency background having worked as a UX/UI Designer at local respected agency Made by Grizzly.

### SELECT PROJECT EXPERIENCE

#### **North County Transit District (NCTD), Rail Safety Month Campaign**

In collaboration with the client, NCTD, Eddie played a pivotal role in crafting an identity for their rail safety month campaign. Leveraging his expertise in design and branding, he developed a visually compelling concept that effectively conveyed the importance of rail safety. Through careful selection of imagery, color palette, and messaging, the campaign identity captured the attention of the target audience while conveying a sense of urgency and responsibility.

#### **San Diego Association of Governments (SANDAG) Regional Plan**

Eddie has helped develop multiple social media campaigns and supporting collateral. He has developed various longer form videos for SANDAG's Regional Plan YouTube channel as well as scaled for Instagram and Facebook use. Villanueva has also developed a wide range of print and digital assets in support of public outreach and engagement strategies.



## SECTION E

# Diversity, Equity and Inclusion (DEI) Expertise and Strategic Approaches

Southwest Strategies Group has extensive expertise in applying diversity, equity, and inclusion (DEI) best practices through equitable outreach and engagement strategies. In response to the global pandemic and sociopolitical shifts, our team has developed a new outreach philosophy centered on reaffirming values of diversity and inclusion. Our approach focuses on meeting people where they are—whether in person, online, or a hybrid of both—ensuring that every community feels comfortable engaging. This philosophy has led to a proven track record of reaching previously underrepresented groups and addressing disparities in communication and resource access.

Recognizing the digital divide and the needs of older and vulnerable populations, in-person outreach remains a critical component of our strategy. We understand that these communities are just as essential in the outreach process, and our comprehensive, thoughtful approach ensures their inclusion. Southwest Strategies' proposal will incorporate unique and meaningful tools to educate, communicate, and engage all stakeholders across Santa Barbara County, focusing on the equitable distribution of resources and opportunities.

When developing outreach tactics, presentations, and collateral, we prioritize the diversity of the region, ensuring each unique resident is approached in a way that resonates with them. We place a strong emphasis on engaging communities traditionally left out of the conversation, using inclusive language and creating comfortable spaces for open, transparent dialogue.

Equitable, inclusive, and accessible outreach is central to our work. We recognize the barriers that vulnerable communities face in accessing emergency and disaster preparedness information and have demonstrated success in addressing these challenges. Our approach includes working with trusted community-based organizations, conducting multilingual campaigns, and dispelling common myths and fears around emergency preparedness. By leveraging our expertise in DEI, we will create a campaign that empowers communities to take action, such as building affordable emergency kits and registering for alerts, while addressing their concerns about sharing personal information.

# SECTION F

## Cost Proposal Form

### Attachment C – Mandatory Reply Form: Fee Schedule

Company Name		Southwest Strategies	
Component 1	Task	Estimated Total Hours (All Positions)	Extended Cost
	Conduct four (4) bilingual English/Spanish community listening sessions	138 in-person/ 80 virtual	\$ \$32,340 in-person/ \$13,180 virtual
	Develop a bilingual (English/Spanish) Train-The-Trainer Community Education Program curriculum	208	\$ 33,715
	Deliver one (1) Train-the-Trainer Community Education Program overview session for OEM staff	40	\$ 8,560
		<b>Sub-Total</b>	\$ 74,615 in person / \$55,455 virtual
Component 2	Printed, Digital and Multimedia Outreach Products		
	Develop three (3) Public Service Announcement (PSA) videos	82	\$ 13,660
	Develop three (3) traditional and streaming radio spots	37	\$ 6,405
	Develop two (2) print and audio ads advertising registering for Santa Barbara County ReadySBC Alerts	80	\$ 12,755
	Develop 6-8 "blue skies" emergency and disaster preparedness message scripts	24	\$ 3,500
	Develop new and/or update existing printed and digital community educational and promotional materials on all-hazards preparedness	142	\$ 27,920
		<b>Sub-Total</b>	\$ 64,260
		<b>Grand Total</b>	\$ 138,875 in-person/ \$119,715 virtual

Position	Hourly Rate	Estimated Hours	Extended Cost
Project Manager	\$235	80	\$18,800
Multicultural Outreach and Training Lead	\$165	170	\$28,050
Digital and Training Lead	\$195	133	\$25,935
Project Support	\$110	205	\$22,550
Graphic Designer	\$140	111	\$15,540
Advertising Graphic Designer	\$130	76	\$9,880

## **SECTION G**

# Overall Compliance

Southwest Strategies Group agrees to follow RFP Terms as well as County Terms and Conditions.

# SECTION H

## Required Forms

### Attachment B – Mandatory Reply Form: References

R-1.	Company Name	Fresno County Department of Elections
	Address	2221 Kern St.
	City / State / Zip	Fresno, CA, 93721
	Contact Person / Title	James Kus, County Clerk/Registrar of Voters
	Phone	559-600-1730
	Date Services Began and Ended	2019-2022
	Brief Description of Services	The Fresno County Department of Elections retained Southwest Strategies to conduct branding, communications, community outreach and media relations services to educate the public about its transition to a Voters Choice Act (VCA) voting model.
R-2.	Company Name	City of Santa Barbara
	Address	630 Garden St.
	City / State / Zip	Santa Barbara, CA, 93101
	Contact Person / Title	Erika Chan, Water Resources Specialist
	Phone	805-560-7556
	Date Services Began and Ended	2023-2024
	Brief Description of Services	The City of Santa Barbara Public Works Department retained our team to conduct a creative, integrated marketing campaign to raise awareness of water conservation as a way of life and promote the City's water conservation rebates.
R-3.	Company Name	Pacific Gas & Electric Company
	Address	300 Lakeside Drive
	City / State / Zip	Oakland, Ca, 94612
	Contact Person / Title	Chris Boeber, Director of Customer Emergency Planning and Operations
	Phone	415-407-4358
	Date Services Began and Ended	2020-2024
	Brief Description of Services	PG&E retained Southwest Strategies to support CRC logistics for all- hazards events. This includes recruiting, hiring and training of approximately 1,000 staff to serve at CRC sites during all-hazards or other adverse weather events.