



NapaSan

KATZ & ASSOCIATES - TASK ORDER No. 2 Rate Support and Outreach Part 2

Date: December 29, 2020

Issued under Professional Services Agreement dated November 16, 2020.

To: Katz and Associates

Project Description:

Outreach Support for Prop. 218 Rate Increase

Description of Scope of Services to be performed by Consultant under this Task Order:

See Attached Scope of Work and Budget

Deliverables:	See Attached Scope of Work and Budget
Consultant Project Manager:	Emily Otis
Schedule to Perform Services:	See Attached Scope of Work and Budget
Time & Materials Not-to-Exceed Cost Limit:	\$65,965.00
	See Attached Scope of Work and Budget

APPROVALS:

KATZ & ASSOCIATES

By: _____
Authorized Representative

Date

NAPA SANITATION DISTRICT

By: _____
Purchasing Agent

Date

NSD Account No.: _____

Napa Sanitation District
Rate Support Scope of Work and Budget – Part 2
Timeline: Jan. 7, 2021 – April 9, 2021 (13-week duration)

The following is a scope of work to continue to support rate communication associated with Napa Sanitation District (NapaSan)'s five-year rate study and Prop. 218 process. It is understood that rate communication and stakeholder needs may change during the scope duration; K&A will work closely with NapaSan staff to adjust as needed to ensure access to up-to-date, understandable rate and Prop 218 information through early April 2021. This Part 2 scope includes the following:

- 1. Develop in-depth talking points and Frequently-Asked Questions document** building upon completed message platform including:
 - Assumes development of draft and final with one update.
 - Assumes some formatting and graphic design, so the final FAQ can be posted online and used for outreach efforts as needed.
- 2. Informational materials and media outreach support** including:
 - One 11 x 17, four color, graphically-designed brochure providing high-level information for all customer classifications about the proposed rate modifications and Prop 218 process. Includes development of up to three graphic images to help describe complex rate information. (Includes coordination and design of the brochure as well as coordinating reviews prior to finalization.)
 - Two, 8 ½ x 11, double-sided, black and white Prop 218 notifications (one residential, one commercial/industrial). Assumes NapaSan and/or rate consultant to provide required language and charts and assumes review by NapaSan attorney to ensure compliance with Prop 218 requirements. (Includes draft, draft final and final versions of each, including versions for the website)
 - Up to two media releases specific to the proposed rate modification and Prop 218 process (develop draft, coordinate review and finalize). As needed support for additional media outreach efforts.
 - Provide electronic versions of all materials for online posting.
 - Assumes all translation, printing and mailing for all materials will be completed by NapaSan.
- 3. Public engagement forums.** Working with NapaSan staff, prepare logistics for, implement, and facilitate logistics for the public engagement forums and/or a virtual open house.
 - Assumes updates to the draft logistics plan to outline specific roles and responsibilities and notification processes for the forums.
 - Assumes time for a tech dry-run using the Zoom platform to make sure all staff and the team are prepared.

- Includes coordination with NapaSan staff to develop template presentation and facilitation of one spokesperson preparation workshop.
- Assumes preparation of meeting notification content (for online posting, social media and potential mailing done by NapaSan) as well as at least four staff participating in the forums.
- Assumes up to 10 hours of graphic design time for materials or presentation design work.
- Also assumes meeting debrief(s) with staff and development of high-level meeting summaries with a focus on the questions and concerns raised by participants.
- Assumes NapaSan to pay for printing and distribution.
- Small amount of expenses included for as-needed materials related to the forums.

4. Meeting participation, project management and strategic counsel.

- This includes participating in regular project team meetings by video/phone and internal team meetings to discuss strategy development and deliverables.
- Includes preparations and participation in up to two Board meetings to provide updates on the outreach efforts.
- This includes preparation and completion of contract set up activities and monthly activity summaries describing work performed.

***** Katz & Associates only invoices on a time and materials basis, so the team will invoice only for actual hours worked on this initiative. *****

TASK DESCRIPTION Assumes 13-week duration starting on Jan. 7, 2021	Principal in Charge <i>K. Snyder</i>		Project Manager <i>E. Otis</i>		Assistant Project Manager <i>E. Cox</i>		Materials Coordinator <i>C. Stephens</i>		Project Support <i>W. Chen; K. Franco</i>		Graphic Design <i>K. Di Giovanni</i>		Total Labor		Expenses	TOTAL COST
	\$220.00		\$180.00		\$165.00		\$165.00		\$110.00		\$140.00					
	Hrs.	Cost	Hrs.	Cost	Hrs.	Cost	Hrs.	Cost	Hrs.	Cost	Hrs.	Cost	Hrs.	Costs		
In-depth talking points and Frequently-Asked Questions document. Assumes development of draft and final with one update. Assumes some formatting and graphic design, so the final FAQ can be posted online and used for outreach efforts as needed.	8	\$1,760	10	\$1,800	12	\$1,980	-	\$0	8	\$880	4	\$560	42	\$6,980		\$6,980
Informational materials and Media Outreach Support. One 11 x 17, four color, graphically-designed brochure; two, 8 ½ x 11, double-sided, black and white Prop 218 notifications (one residential, one commercial/industrial); up to two media releases specific to the proposed rate modification and Prop 218 process (coordinate and design brochure, coordinate reviews and finalize). Assumes all translation, printing and mailing will be completed by NapaSan. As needed support for additional media outreach efforts.	10	\$2,200	20	\$3,600	10	\$1,650	12	\$1,980	16	\$1,760	34	\$4,760	102	\$15,950		\$15,950

TASK DESCRIPTION Assumes 13-week duration starting on Jan. 7, 2021	Principal in Charge		Project Manager		Assistant Project Manager		Materials Coordinator		Project Support		Graphic Design		Total Labor		Expenses	TOTAL COST
	K. Snyder		E. Otis		E. Cox		C. Stephens		W. Chen; K. Franco		K. Di Giovanni					
	\$220.00		\$180.00		\$165.00		\$165.00		\$110.00		\$140.00					
	Hrs.	Cost	Hrs.	Cost	Hrs.	Cost	Hrs.	Cost	Hrs.	Cost	Hrs.	Cost	Hrs.	Costs		
Public engagement forums. Working with NapaSan staff, prepare logistics for, implement, and facilitate logistics for up to two public engagement forums and/or one virtual open house. This scope assumes a meeting plan to outline specific roles and responsibilities and notification processes for the forums. Includes coordination with NapaSan staff to develop template presentation and facilitation of one spokesperson(s) preparation workshop. Assumes one dry-run with technology. Assumes preparation of meeting notification content (for online posting, social media and potential mailing done by NapaSan) as well as staff participation in the events. Assumes NapaSan to pay for printing and distribution. Also assumes meeting debrief(s) with staff and development of high level meeting summaries with a focus on the questions and concerns raised by participants. Small amount of expenses included for as-needed materials.	10	\$2,200	24	\$4,320	24	\$3,960	40	\$6,600	60	\$6,600	10	\$1,400	168	\$25,080	\$200	\$25,280
Meeting participation, project management and strategic counsel. Includes participating in regular project team meetings by video/phone and internal team meetings to discuss strategy development and deliverables; preparations and participation in up to two Board meetings to provide updates on the outreach efforts; preparation and completion of contract set up activities and monthly activity summaries describing work performed.	13	\$2,860	39	\$7,020	26	\$4,290	13	\$2,145	8	\$880	4	\$560	103	\$17,755		\$17,755
Subtotal	41	\$9,020	93	\$16,740	72	\$11,880	65	\$10,725	92	\$10,120	52	\$7,280	415	\$65,765	\$200	\$65,965
GRAND TOTAL	41	\$9,020	93	\$16,740	72	\$11,880	68	\$11,220	92	\$10,120	52	\$7,280	415	\$65,765	\$200	\$65,965