

REQUEST FOR PROPOSAL

Marketing Analysis, Strategic Positioning, and Rebranding Services

El Centro de Corazón

| | |
|------------------|--|
| Date Issued | April 8, 2026 |
| Questions Due | April 17, 2026, 5:00 PM CST |
| Proposal Due | May 8, 2026, 5:00 PM CST |
| Submission Email | jfuentes@elcentrochc.org |

Issued in accordance with 2 CFR Part 200 and El Centro procurement policies.

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SECTION 1. ISSUING ORGANIZATION

El Centro de Corazón (“El Centro”) is a Federally Qualified Health Center headquartered in Houston, Texas. El Centro provides comprehensive, integrated, and culturally responsive healthcare services to medically underserved populations through a care model designed to improve access, continuity, and outcomes. The organization operates multiple service delivery sites and provides primary care, behavioral health, dental, pharmacy, and social care services that are coordinated across clinical and community settings.

El Centro serves a diverse patient population that includes individuals who are uninsured, underinsured, or enrolled in Medicaid and Medicare. The organization’s mission-driven model emphasizes health equity, prevention, chronic disease management, and the reduction of barriers to care. El Centro’s long-term strategy is to strengthen its role as an integrated, community-based provider while also improving sustainability through thoughtful growth, stronger market positioning, and operational alignment.

SECTION 2. PURPOSE OF THIS RFP

El Centro is issuing this Request for Proposal (“RFP”) to obtain professional services from a qualified and experienced marketing, brand strategy, and advisory firm capable of supporting a comprehensive organizational initiative focused on market analysis, strategic positioning, and, if recommended by the findings, rebranding and phased implementation support.

The selected Contractor will be expected to conduct a data-driven assessment of El Centro’s service area, competitive environment, referral ecosystem, and target patient populations. The Contractor will also evaluate El Centro’s current brand identity, messaging, and market perception in order to determine whether the existing brand accurately reflects the organization’s mission, strategic direction, and future growth ambitions. Based on those findings, the Contractor will develop a multi-year strategic marketing plan that identifies actionable priorities for patient growth, retention, payer mix improvement, service line promotion, digital engagement, and community outreach.

If the assessment demonstrates that a broader repositioning effort is warranted, the Contractor will also be expected to develop and support a full rebranding initiative, including brand strategy, messaging, visual identity, governance guidance, and implementation planning. This RFP is intended to result in a practical, implementation-oriented body of work that El Centro can use to guide decision-making and allocate resources over a three- to five-year period.

SECTION 3. PROCUREMENT AUTHORITY & COMPLIANCE

This procurement is being conducted in accordance with the Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards, including 2 CFR §§200.317 through 200.327, together with El Centro’s internal procurement policies and conflict of interest standards. All respondents are expected to comply fully with those requirements throughout the procurement process and, if selected, throughout the contract term.

El Centro will conduct this procurement using principles of full and open competition. Respondents shall not engage in conduct that restricts competition, creates an unfair competitive advantage, or gives rise to actual or apparent conflicts of interest. El Centro will maintain documentation of the procurement process, including the solicitation, proposals received, evaluation materials, scoring records, conflict disclosures, and cost or price analysis. The selected Contractor may be required to provide additional documentation to support cost reasonableness, staffing assumptions, and the basis of its proposed fees.

By submitting a proposal, each respondent represents that the information provided is accurate, that the respondent is authorized to perform the services described, and that the respondent is not debarred, suspended, or otherwise ineligible to participate in federally funded procurements. Failure to comply with the requirements of this section may result in rejection of the proposal or termination of negotiations.

SECTION 4. STRATEGIC CONTEXT

El Centro is undertaking this initiative as part of a broader strategic effort to strengthen organizational growth, financial sustainability, and market relevance. A central component of this strategy is expansion into the South

Houston and Hobby service area, including ZIP codes 77034, 77061, 77075, and 77587. El Centro is seeking a clearer understanding of community need, competitive dynamics, payer opportunity, referral flows, and service gaps within and beyond its current footprint.

In addition to geographic expansion, El Centro seeks to improve how it is understood by patients, referral partners, funders, and the broader community. The organization's leadership recognizes that long-term growth depends not only on access and service capacity, but also on strong positioning, clear messaging, and a brand identity that communicates integrated, value-based, community-centered care. Through this engagement, El Centro seeks a strategy that supports increased patient acquisition, stronger retention, improved referral capture, more balanced payer mix, and greater competitiveness for public and philanthropic investment.

SECTION 5. SCOPE OF WORK

The Contractor shall provide a fully integrated body of work covering market intelligence, brand assessment, strategic marketing planning, potential rebranding, and implementation planning. The scope shall be delivered in phases that build logically from analysis to strategy to execution readiness. The Contractor shall be responsible for recommending methods, gathering and analyzing data, facilitating stakeholder input, preparing draft and final deliverables, presenting findings, and revising work products based on El Centro feedback.

5.1 Market and Comparative Analysis

The Contractor shall conduct a comprehensive service area analysis that includes demographic, socioeconomic, and utilization-related insight at the ZIP code or comparable geographic level. The analysis shall include population characteristics, household composition, language considerations, insurance distribution, and other indicators relevant to access and healthcare demand. The Contractor shall provide five- to ten-year growth projections and identify areas where current or future need may support expanded outreach, site development, service deployment, or partnership strategy.

The Contractor shall perform a competitive landscape review that identifies and analyzes relevant providers operating in El Centro's market, including other Federally Qualified Health Centers, hospital systems, large physician groups, independent providers, and selected specialty access pathways. The review shall assess service offerings, geographic presence, positioning, referral implications, and, where feasible, relative market share or practical market influence. The Contractor shall identify areas of service overlap, unmet need, and opportunities for differentiation.

The Contractor shall develop a patient segmentation framework that enables El Centro to understand and prioritize target populations. That work shall account for payer category, disease burden, utilization patterns, access barriers, and populations relevant to value-based care performance. The Contractor shall identify segments with meaningful growth potential, including Medicare growth populations, working uninsured populations, special populations, and groups that may benefit from improved outreach, navigation, retention, or referral coordination.

The Contractor shall assess referral and access dynamics, including referral sources, leakage patterns, specialty access constraints, and barriers that limit conversion or continuity of care. The Contractor shall evaluate how community perception influences utilization and shall use appropriate methods such as surveys, focus groups, interviews, or other stakeholder engagement tools to assess trust, awareness, and the relevance of El Centro's current market presence. The final Market Intelligence Report shall synthesize all findings into clear strategic implications and recommendations.

5.2 Brand Assessment

The Contractor shall evaluate El Centro's current brand identity in order to determine whether the organization's existing positioning, messaging, and visual presentation are aligned with its mission, service model, growth plans, and desired market reputation. This work shall include a review of current marketing materials, digital presence, service-line messaging, and other public-facing expressions of the brand.

The Contractor shall engage key stakeholders, including patients, staff, leadership, community partners, and funders, in order to gather qualitative insight into how El Centro is currently perceived, where the brand is resonating effectively, and where confusion, inconsistency, or missed opportunity exists. The Contractor shall

identify strengths to preserve, weaknesses to address, and areas in which the current brand may be limiting growth, differentiation, or organizational clarity. The final Brand Assessment Report shall include a gap analysis and practical recommendations for either strengthening the current brand or pursuing a broader repositioning strategy.

5.3 Strategic Marketing Plan (3–5 Years)

The Contractor shall develop a comprehensive strategic marketing plan that translates the analytical and brand assessment findings into a practical three- to five-year roadmap. The plan shall include clear objectives, target audiences, strategic initiatives, implementation priorities, and performance measures. The plan shall address patient acquisition across payer segments, including Medicaid, Medicare, uninsured, and commercially insured populations, and shall identify geographic priorities for outreach and growth.

The Contractor shall include strategies for patient retention, continuity of care, and service line promotion across primary care, behavioral health, dental, pharmacy, social care, and other priority offerings identified by El Centro. The plan shall also address digital strategy, including website optimization, search visibility, social media, online engagement, and other channels that support appointment conversion, trust-building, and patient loyalty. Community outreach and partnership development shall be incorporated as integral parts of the plan rather than as stand-alone activities.

The final plan shall be written in a manner that enables leadership to use it as an operational decision-making tool. Accordingly, the plan shall identify sequencing, ownership considerations, resource implications, and measurable outcomes rather than providing only conceptual guidance.

5.4 Rebranding Services

If the analysis and brand assessment support a broader repositioning effort, the Contractor shall provide rebranding services that include brand strategy, messaging, visual identity development, and implementation guidance. The Contractor shall articulate the recommended brand positioning and brand architecture and shall determine whether naming refinements or naming alternatives should be considered.

The Contractor shall develop a visual identity system that is appropriate for a healthcare organization serving diverse communities and that can be applied consistently across print, digital, environmental, and community-facing uses. The Contractor shall also prepare a messaging framework that includes mission alignment, value proposition, key messages, and audience-specific language. All recommended branding shall be culturally responsive and shall account for Spanish-language communication needs and broader community relevance. The final deliverable shall include a complete brand package and brand standards manual.

5.5 Implementation and Performance Framework

The Contractor shall prepare a phased implementation roadmap that translates the recommended strategy into a sequence of actionable steps. The roadmap shall identify near-term, mid-term, and longer-term priorities, resource considerations, dependency issues, and decision points requiring leadership input. The Contractor shall also describe how the organization can support internal adoption so that the work is integrated across operations, service lines, and leadership functions.

The Contractor shall define a practical performance framework that includes a governance approach and a set of key performance indicators tied to the goals of the engagement. At a minimum, the framework shall address patient growth, payer mix shifts, market penetration, referral performance, and brand awareness or engagement. The output shall be suitable for management use and shall provide El Centro with a structure for monitoring progress after the engagement concludes.

SECTION 6. CONTRACT DELIVERABLES

At a minimum, the selected Contractor shall provide the following deliverables in draft and final form: a Market Intelligence Report; a Brand Assessment Report with gap analysis; a three- to five-year Strategic Marketing Plan; a Rebranding Package and Brand Standards Manual if rebranding is recommended; and an Implementation Roadmap with associated KPI framework. Deliverables shall be prepared in professional format suitable for executive review, presentation, and ongoing operational use.

El Centro expects each major deliverable to include a concise executive summary, clearly stated findings, explanation of methods used, supporting analysis, and actionable recommendations. Deliverables shall be presented to El Centro leadership at key milestones, and the Contractor shall incorporate reasonable feedback before final submission. All final work products shall become the property of El Centro upon payment, subject to any preexisting intellectual property rights expressly disclosed in the proposal.

SECTION 7. PROPOSAL FORMAT REQUIREMENTS

Respondents shall submit proposals that are complete, organized, and responsive to every requirement in this RFP. The proposal narrative shall be written clearly enough to allow evaluators to understand both the respondent's qualifications and the specific approach the respondent will use to perform the work. Marketing language without supporting detail is discouraged. El Centro intends to evaluate substance, rigor, and fit rather than general promotional statements.

Proposals should not exceed twenty pages excluding resumes, certifications, required forms, and supporting appendices. Proposals shall use a readable professional font, one-inch margins or equivalent balanced margins, and a format that enables consistent review. To support a fair evaluation process, respondents shall follow the response template and section order provided in Appendix A of this package. Proposals that omit required information, materially depart from the requested format, or fail to address the scope with sufficient specificity may receive reduced scores or be deemed non-responsive.

SECTION 8. COST PROPOSAL REQUIREMENTS

Respondents shall provide a detailed cost proposal that presents the total project price and the cost of each major phase of work. The cost proposal shall identify the assumptions on which pricing is based, including the anticipated level of effort, staffing model, number of stakeholder sessions, number of drafts included, travel assumptions if any, and any optional or excluded services.

If hourly rates are used as part of the pricing structure, respondents shall identify the title or labor category associated with each rate and describe how rates will be applied. El Centro may conduct a cost or price analysis and may request clarifications, backup detail, or revised assumptions during evaluation or negotiation. Cost proposals should be sufficiently transparent to allow El Centro to assess reasonableness and alignment with the proposed scope.

SECTION 9. EVALUATION CRITERIA

Proposals will be evaluated using a weighted scoring methodology. The primary evaluation categories are Technical Approach, Relevant Experience, Work Plan and Timeline, Project Team, Cost, and Innovation or Value Add. El Centro may also consider responsiveness to the required format, completeness of the proposal, and the quality of references when making a final selection recommendation.

The weighted evaluation matrix included in this package is intended to support consistency, transparency, and audit readiness. Respondents should review the scoring crosswalk carefully and ensure that each proposal section provides sufficient evidence for evaluators to assign a strong score. General claims that are not supported by examples, methods, or clearly described outcomes may not receive full credit.

SECTION 10. EVALUATION PROCESS

Following the proposal due date, El Centro will first conduct a compliance review to determine whether each submission is complete and responsive to the solicitation. Responsive proposals will then be scored independently by designated evaluators using the scoring tools developed for this procurement. Evaluators will review proposals against the established criteria and document their scores in writing.

After independent review, El Centro may convene a consensus scoring session to discuss findings and reconcile material scoring differences. El Centro may request interviews, oral presentations, demonstrations, or clarifications from one or more respondents if doing so would assist the evaluation process. Final rankings will be used to support an award recommendation, after which El Centro may enter negotiations with the highest-ranked respondent. El Centro reserves the right to discontinue negotiations and proceed to the next-ranked respondent if necessary.

SECTION 11. REQUIRED FORMS (ATTACHED)

Respondents shall complete all required certifications, disclosure statements, and forms included with this package. At a minimum, respondents must provide a conflict of interest disclosure, certification regarding debarment or suspension if requested, references, and a signed acknowledgment of the terms and conditions of this solicitation.

El Centro may require additional forms or clarifications before contract award. Proposals that do not include required forms or signatures may be considered non-responsive unless the omission is waived or corrected at El Centro's discretion.

SECTION 12. PROCUREMENT TIMELINE

El Centro intends to follow the schedule stated in this RFP. The anticipated timeline is as follows: RFP issued on April 8, 2026; questions due on April 17, 2026; proposals due on May 8, 2026; compliance review and evaluation beginning shortly thereafter; finalist presentations, if any, during the second half of May 2026; and award following completion of the evaluation and approval process.

El Centro reserves the right to revise this timeline, extend deadlines, or adjust evaluation milestones if doing so is in the best interest of the procurement. Any material changes will be communicated to all known respondents.

SECTION 13. SUBMISSION INSTRUCTIONS

Proposals shall be submitted electronically in PDF format to jfuentes@elcentrohc.org no later than May 8, 2026, at 5:00 PM Central Time. The email subject line shall clearly identify the submission as a proposal for Marketing Analysis, Strategic Positioning, and Rebranding Services. Respondents are responsible for confirming that the proposal has been transmitted successfully and received by El Centro.

Late submissions may be rejected and need not be evaluated. Respondents should consolidate the proposal into a logical package that includes the narrative response, cost proposal, resumes, sample deliverables, and required forms. If file size limits or technical constraints are anticipated, the respondent shall contact El Centro before the deadline to discuss an acceptable submission method.

SECTION 14. TERMS AND CONDITIONS

El Centro reserves the right to reject any or all proposals, waive minor irregularities, request clarifications, request best and final offers, negotiate final terms, modify the scope of work, or cancel the solicitation in whole or in part if doing so is in the organization's best interest. Issuance of this RFP does not obligate El Centro to award a contract or to pay any costs incurred in the preparation of a response.

All materials submitted in response to this RFP may become part of the procurement record. The selected Contractor will be expected to enter into a written agreement containing terms acceptable to El Centro, including provisions addressing scope, timeline, compensation, ownership of work product, confidentiality, compliance obligations, and other standard contractual protections. Any proposed exceptions to the terms of this solicitation should be clearly identified in the proposal.

SECTION 15. CONTACT

All questions regarding this solicitation shall be submitted in writing to the contact identified below. Respondents should not rely on verbal guidance or informal communications from other El Centro representatives. Only written responses or addenda issued through the designated contact should be considered authoritative for purposes of preparing a proposal.

Joe C. Fuentes, Jr., MBA
Chief Integration Officer
El Centro de Corazón
jfuentes@elcentrohc.org

9.1 Weighted Scoring Matrix

| Criterion | Weight | Primary Evidence in Proposal |
|------------------------|--------|---|
| Technical Approach | 30% | Section 7.4 Technical Approach and Appendix A response matrix |
| Relevant Experience | 20% | Sections 7.2 and 7.3 |
| Work Plan & Timeline | 15% | Section 7.5 |
| Project Team | 10% | Section 7.6 |
| Cost | 20% | Section 7.8 and cost form |
| Innovation / Value Add | 5% | Section 7.9 |

APPENDIX A. REQUIRED PROPOSAL RESPONSE TEMPLATE

Respondents shall structure their proposal using the templates in this appendix. The templates are designed to improve comparability across proposals and to support transparent, consistent scoring. Respondents may expand the response space as needed, but the order and subject matter of the templates should remain unchanged.

A1. Proposal Cover Information

| | |
|--|------------------|
| Legal Name of Respondent | [Enter response] |
| Primary Contact | [Enter response] |
| Title | [Enter response] |
| Email Address | [Enter response] |
| Phone Number | [Enter response] |
| Business Address | [Enter response] |
| Website | [Enter response] |
| Unique Entity Identifier (if applicable) | [Enter response] |

A2. Executive Summary (Supports Technical Approach)

Provide a concise but substantive summary of your understanding of El Centro’s objectives, the most important issues you expect to address, the overall approach you propose to use, and the reasons your firm is well-suited for this engagement. The response should demonstrate strategic understanding rather than provide general marketing language.

| Required Content | Vendor Response |
|--|------------------|
| Understanding of El Centro’s objectives and strategic context | [Enter response] |
| Key issues, opportunities, or hypotheses your firm believes should be examined | [Enter response] |
| Summary of proposed engagement approach | [Enter response] |
| Why your firm is particularly qualified for this engagement | [Enter response] |

A3. Firm Profile and Organizational Capacity (Supports Relevant Experience)

Describe your organization, its ownership and structure, the services it provides, and its capacity to complete this engagement within the required timeframe. Explain your experience serving healthcare organizations, safety-net providers, community health centers, or related mission-driven organizations.

| Required Content | Vendor Response |
|--|------------------|
| Firm history and core services | [Enter response] |
| Experience relevant to healthcare, FQHCs, safety-net organizations, or community-based service providers | [Enter response] |
| Organizational capacity, staffing depth, and availability for this engagement | [Enter response] |
| Any subcontractors, affiliates, or partner firms proposed for this work | [Enter response] |

A4. Relevant Experience (Supports Relevant Experience)

Provide three to five examples of comparable engagements completed within the last five years. Emphasize projects involving healthcare strategy, market analysis, brand repositioning, rebranding, or community-centered growth strategy. Each project should include outcomes, not just activities performed.

| Required Content | Vendor Response |
|--|------------------|
| Project example 1: client, scope, methods used, and outcomes | [Enter response] |
| Project example 2: client, scope, methods used, and outcomes | [Enter response] |
| Project example 3: client, scope, methods used, and outcomes | [Enter response] |
| Optional project example 4 | [Enter response] |

| Required Content | Vendor Response |
|----------------------------|------------------|
| Optional project example 5 | [Enter response] |

A5. Technical Approach (Supports Technical Approach)

Provide a detailed, step-by-step description of how your firm will perform each part of the scope of work. This section will be evaluated heavily. The response should identify methods, data sources, stakeholder engagement approaches, analytical frameworks, assumptions, and how draft and final deliverables will be produced.

| Required Content | Vendor Response |
|--|------------------|
| Approach to service area analysis, demographic analysis, payer analysis, and population projections | [Enter response] |
| Approach to competitive landscape assessment, service overlap analysis, and market opportunity identification | [Enter response] |
| Approach to patient segmentation, value-based care alignment, and referral or leakage analysis | [Enter response] |
| Approach to stakeholder engagement, interviews, surveys, focus groups, or other perception research | [Enter response] |
| Approach to brand assessment and gap analysis | [Enter response] |
| Approach to developing the strategic marketing plan, including service line strategy and digital strategy | [Enter response] |
| Approach to rebranding, including brand positioning, visual identity, and messaging if rebranding is recommended | [Enter response] |
| Approach to implementation planning, governance, and KPI framework development | [Enter response] |

A6. Work Plan and Timeline (Supports Work Plan & Timeline)

Provide a project plan that is specific enough for El Centro to understand the sequence of work, duration of major tasks, review cycles, and decision points. The work plan should reflect a realistic schedule and identify dependencies, assumptions, and expected El Centro participation.

| Required Content | Vendor Response |
|--|------------------|
| Phase-by-phase work plan and major activities | [Enter response] |
| Timeline, milestones, and expected duration of each phase | [Enter response] |
| Deliverables produced at each stage of the project | [Enter response] |
| Assumptions, dependencies, and required participation from El Centro staff or leadership | [Enter response] |

A7. Project Team (Supports Project Team)

Describe the proposed team that will perform the work. Identify the project lead, principal-in-charge, day-to-day manager, key subject matter experts, and any subcontractors. Explain the role each person will play and why the team is well-matched to the engagement.

| Required Content | Vendor Response |
|--|------------------|
| Project organizational structure and lines of responsibility | [Enter response] |
| Project lead and primary contact | [Enter response] |
| Key team members, qualifications, and role in the work | [Enter response] |
| Subcontractors or specialty contributors, if any | [Enter response] |

A8. Sample Deliverables (Supports Technical Approach and Innovation)

Provide representative examples of comparable work product, such as market intelligence reports, strategic marketing plans, brand strategy documents, rebranding outputs, dashboards, or implementation roadmaps. Explain why the samples are relevant to this procurement and what role your firm played in producing them.

| Required Content | Vendor Response |
|---|------------------|
| Description of sample deliverable 1 and relevance | [Enter response] |
| Description of sample deliverable 2 and relevance | [Enter response] |
| Optional additional samples | [Enter response] |

A9. Cost Proposal (Supports Cost)

Complete the cost proposal in sufficient detail for El Centro to evaluate reasonableness, completeness, and alignment with the proposed scope. If assumptions materially affect price, they must be stated clearly. If optional work is proposed, separate it from the required scope.

| Required Content | Vendor Response |
|---|------------------|
| Total fixed fee or total proposed cost | [Enter response] |
| Cost by major phase of work | [Enter response] |
| Hourly rates or labor categories, if applicable | [Enter response] |
| Pricing assumptions and exclusions | [Enter response] |
| Optional services or alternate pricing structures, if any | [Enter response] |

A10. Value Proposition and Innovation (Supports Innovation / Value Add)

Describe what differentiates your firm and what additional value you would bring to this engagement beyond the minimum scope of work. This section should focus on practical value, distinctive capability, and ideas that would strengthen implementation or long-term impact for El Centro.

| Required Content | Vendor Response |
|---|------------------|
| Differentiators that are specifically relevant to this engagement | [Enter response] |
| Tools, methods, or ideas that add value beyond the base scope | [Enter response] |
| How your approach reduces risk or improves implementation success | [Enter response] |

A11. References (Supports Validation)

Provide at least three references for comparable engagements. References should be able to speak to the quality of your firm's work, reliability, communication, and results.

| Required Content | Vendor Response |
|---|------------------|
| Reference 1: organization, contact name, title, email, phone, and project performed | [Enter response] |
| Reference 2: organization, contact name, title, email, phone, and project performed | [Enter response] |
| Reference 3: organization, contact name, title, email, phone, and project performed | [Enter response] |

APPENDIX B. REQUIRED CERTIFICATIONS AND DISCLOSURES

Each respondent shall complete the following statements and include a signed copy of this appendix in its proposal. A proposal may be deemed non-responsive if required certifications are omitted or unsigned.

B1. Conflict of Interest Disclosure

Disclose any actual, potential, or perceived conflict of interest that could affect your firm's objectivity in performing this engagement. If no conflicts are known, state that no known conflicts exist.

[Enter certification / disclosure response]

Authorized Signature: _____ Name and Title: _____ Date:

B2. Debarment and Suspension Certification

Confirm whether the respondent and its principals are debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in federally funded transactions.

[Enter certification / disclosure response]

Authorized Signature: _____ Name and Title: _____ Date:

B3. Pending Litigation or Adverse Findings

Disclose any material litigation, government investigation, or adverse regulatory finding within the last five years that could reasonably affect your firm's performance, stability, or reputation.

[Enter certification / disclosure response]

Authorized Signature: _____ Name and Title: _____ Date:

B4. Acceptance of Terms and Conditions

State whether the respondent accepts the terms and conditions of this RFP. If exceptions are requested, list them clearly and explain the reason for each requested exception.

[Enter certification / disclosure response]

Authorized Signature: _____ Name and Title: _____ Date:

APPENDIX C. EVALUATION CROSSWALK AND SCORING GUIDANCE

This appendix explains how proposal sections align to the evaluation criteria. The same structure is reflected in the scoring workbook provided for internal evaluation. Respondents should use this crosswalk to ensure that each required section contains specific evidence that supports a strong score.

| Criterion | Weight | Key Proposal Sections | What Evaluators Will Look For |
|------------------------|--------|-----------------------|--|
| Technical Approach | 30% | A2 and A5 | Clear understanding of objectives, rigorous methodology, appropriate data sources, stakeholder engagement approach, and a practical implementation path. |
| Relevant Experience | 20% | A3 and A4 | Demonstrated experience with similar work, especially in healthcare or mission-driven settings, plus evidence of measurable results. |
| Work Plan & Timeline | 15% | A6 | A realistic schedule, logical sequencing, adequate review points, and clear understanding of dependencies. |
| Project Team | 10% | A7 | Qualified team members, clear accountability, and a staffing model that matches the complexity of the engagement. |
| Cost | 20% | A9 | Transparent and reasonable pricing, complete assumptions, and alignment between cost and the scope proposed. |
| Innovation / Value Add | 5% | A8 and A10 | Distinctive ideas, practical enhancements, and evidence that the firm can create value beyond the minimum requirements. |

APPENDIX D. DETAILED COST PROPOSAL FORM

Respondents shall complete the cost table below and may expand it if additional detail is necessary. Costs should correspond to the scope and work plan presented in the proposal. If travel is proposed, it shall be clearly separated from professional service fees.

| Phase | Description | Cost | Hours | Rate | Assumptions / Notes |
|--------------------------|-------------|---------|---------|---------|---------------------|
| Market Analysis | [Enter] | [Enter] | [Enter] | [Enter] | [Enter] |
| Brand Assessment | [Enter] | [Enter] | [Enter] | [Enter] | [Enter] |
| Strategic Marketing Plan | [Enter] | [Enter] | [Enter] | [Enter] | [Enter] |
| Rebranding | [Enter] | [Enter] | [Enter] | [Enter] | [Enter] |
| Implementation Planning | [Enter] | [Enter] | [Enter] | [Enter] | [Enter] |
| Optional Services | [Enter] | [Enter] | [Enter] | [Enter] | [Enter] |
| Travel / Direct Expenses | [Enter] | [Enter] | [Enter] | [Enter] | [Enter] |
| Total | [Enter] | [Enter] | [Enter] | [Enter] | [Enter] |