

**SECOND AMENDMENT TO AGREEMENT
BETWEEN THE COUNTY OF SAN MATEO AND
VIVA SOCIAL IMPACT PARTNERS**

THIS AMENDMENT TO THE AGREEMENT, entered into this day of _____,
by and between the County of San Mateo, hereinafter called "County," and VIVA Social
Impact Partners, hereinafter called "Contractor";

W I T N E S S E T H:

WHEREAS, pursuant to Government Code, Section 31000, County may contract with independent contractors for the furnishing of such services to or for County or any Department thereof;

WHEREAS, on January 9, 2024, the parties entered into an Agreement for the purpose of providing communication consulting services for a total obligation of \$200,000, for the term of December 01, 2023 through November 30, 2025; and

WHEREAS, on June 11, 2024, the parties amended the Agreement to increase funding by \$47,000 for a new total obligation amount of \$247,000 and adjusted Year 1 budget expenses in Exhibit B, and

WHEREAS, the parties wish to amend the Agreement to increase funding by \$99,955 for a new total obligation amount of \$346,955 and correct Year 1 and revise Year 2 budgets by replacing Exhibit A and B with Exhibit A1 and B1 respectively, and

NOW, THEREFORE, IT IS HEREBY AGREED BY THE PARTIES HERETO AS FOLLOWS:


1. Section 3 -Payments of the Agreement are amended to read as follows:
In consideration of the services provided by Contractor in accordance with all terms, conditions, and specifications set forth in this Agreement and in Exhibit A, County shall make payment to Contractor based on the rates and in the manner specified in Exhibit B1. County reserves the right to withhold payment if County determines that the quantity or quality of the work performed is unacceptable. In no event shall County's total fiscal obligation under this Agreement exceed THREE HUNDRED FORTY-SIX THOUSAND NINE HUNDRED FIFTY-FIVE DOLLARS (\$346,955). In the event that the County makes any advance payments, Contractor agrees to refund any amounts in excess of the amount owed by the County at the time of contract termination or

expiration. Contractor is not entitled to payment for work not performed as required by this agreement.

2. Original Exhibit A is replaced with Exhibit A1 – Services.
3. Original Exhibit B is replaced with Exhibit B1 – Payments and Rates.
4. **All other terms and conditions of the Agreement dated January 9, 2024, between the County and Contractor shall remain in full force and effect.**

In witness of and in agreement with this Agreement's terms, the parties, by their duly authorized representatives, affix their respective signatures:

For Contractor: VIVA Social Impact Partners

<small>DocuSigned by:</small>  <small>541BDC2F1BB64B7...</small>	4/2/2025	Christina Collosi
_____ Contractor Signature	_____ Date	_____ Contractor Name (please print)

For County:

COUNTY OF SAN MATEO

By:
President, Board of Supervisors,
San Mateo County

Date:

ATTEST:
By:
Clerk of Said Board

Exhibit A1—Services

In consideration of the payments set forth in Exhibit B1, Contractor shall provide the following services:

1) Area 1: Communications Planning (Year 1)

- a) Contractor will begin by reviewing The Big Lift's (TBL) current brand, online presence, and materials; its 2023-2026 Strategic Plan, including stakeholder input; and its evaluation and implementation reports to develop a foundational understanding of TBL's program and communications and develop guiding learning questions for the discovery process. Contractor will then guide a goal setting and planning meeting with TBL leadership/staff, wherein the team will confirm learning questions, collaboratively establish core communications goals, and share initial insights on a brand and messaging direction.
- b) To create an inclusive communications plan that focuses on equitable reach and impact, Contractor will engage several key groups of stakeholders. Contractor will utilize these touchpoints to develop insight into communications and messaging opportunities for all identified and anticipated audiences, including policy makers, funders, grantees, community leaders and community members, and the voting public. We believe that equitable communications is grounded in understanding the experiences of those closest to the work. We will utilize these insights to build audience-specific brand messaging frameworks and identify opportunities to communicate effectively with all TBL's audiences.
- c) Contractor will conduct deep dive interviews for TBL's staff, leadership, and community partners. TBL will determine up to 8 interviewees, with a recommended mix of those involved in TBL planning and implementation, as well as people who provide direct services to families as part of TBL's programming. Contractor will develop the interview protocol (questions), schedule the interviews with selected people, conduct the interviews, and conduct analysis of the findings. We will use the interviews to understand how stakeholders view TBL's work, impact, opportunities, and communication priorities. Interviewees will help identify strategies to support TBL communications, share their own needs, and provide feedback on key messages. Partner interviews will also help identify key engagement platforms, spokespeople/champions (trusted messengers), and public/private partnerships to advance TBL's goals.
- d) Contractor will conduct up to 3 virtual parent focus groups to gather their understanding of TBL's issue areas, their experiences with TBL, and their opinions on TBL's communications and brand. This group will help identify strategies for reaching their communities and messaging opportunities across audiences. Parent participants will also help identify key engagement platforms, spokespeople/champions (trusted messengers), and public/private partnerships. Parents would be identified through TBL's engaged partner networks and recruited and confirmed by the Big Lift team. Contractor's role will be to develop the focus group protocol (questions), facilitate the groups and conduct analysis. Focus groups can be conducted in English or Spanish.

2) Audit and Benchmarking

- a) Contractor will audit existing TBL's communications channels and benchmark them against up to 3 other early childhood advocacy organizations. Contractor will develop a thorough evaluation system for analyzing and comparing TBL's current communications with other early childhood advocacy organizations identified as successful and relevant peers in the field. Benchmarking factors would include quality and format of communications content; communications channels used; frequency of communications; timeliness of content; Racial Equity, Diversity, and Inclusion (REDI) sensitivity and responsiveness; and communications consistency with stated priority messaging. Contractor will evaluate TBL and benchmarking organizations across different communications platforms and thoroughly assess them for each.

3) Sense-making and Communications Planning

- a) Contractor will consolidate focus group findings, interview findings, and the communications audit and benchmarking study into a findings report. Contractor will then facilitate a second leadership planning session. Contractor will conduct exercises to support TBL in making sense of the stakeholder insights, and identifying potential communications priorities, strategies, audiences, and calls to action that will inform the communications plan.

4) Communications Plan Development

- a) Based on all of the inputs noted in the Research and Discovery Phase, Contractor will develop a comprehensive written communications plan that will guide TBL's efforts to effectively reach its target audiences. The plan will include goals, priorities, key audiences, strategies, desired outcomes, and metrics. TBL leadership will provide review and feedback on the draft plan, which Contractor will then finalize. Strategies will include opportunities to elevate the profile of TBL's work across target audiences. It will be guided by stakeholder input and ideas for effectively engaging key audiences and will help TBL employ equitable communications practices. While exact contents of the plan are not yet known, some anticipated areas of work are described below.
- b) **Amendment 1- Area 1: Communications Planning (Year 1) – Focus Groups.** Based on the priorities identified by The Big Lift's communication planning group, Contractor will conduct one additional focus group with early elementary educators (TK-3) in addition to the groups included in the original scope of work. This additional focus group will ensure that elementary educators can be asked distinct questions about their experiences teaching reading and their impressions of The Big Lift. In addition, to support successful community engagement, Contractor will manage the recruitment and enrollment processes for the focus groups, including creating recruitment materials, creating registration forms, selecting and inviting participants, coordinating logistics, and administering incentives. Contractor will engage The Big Lift team and partner to help with initial outreach about the focus groups and will provide language and materials to support this.

5) Amendment 2 -Area 1: Event Support – Contractor will support The Big Lift in implementing community events like the 2024 Strategic Plan Launch Event. Activities in this area of work may include, but are not limited to, writing and designing materials to be used before, during, and after events. Contractor will also support the production of materials for events.

6) Area 2: Communications Implementation (Years 1-2)

This area of work may include the below focuses. Exact priorities and timing will be determined in partnership with The Big Lift executive director, based on the communications plan.

- a) Strategic Plan Launch (Year 1) Developing communications to share The Big Lift’s new strategic plan for 2023-26, including the shift in strategic focus and TBL’s priorities. This may include support with marketing a strategic plan launch event and communicating about the event.
- b) Implementation, Communications Tools and Flexible Support (Years 1-2) Additional strategies for reaching TBL’s audiences will be included in the communications plan, based on discovery and Contractor’s communications experience. Contractor understands that the communications need of community-based collective impact efforts range greatly. Strong communications with all of the initiative’s stakeholders, including families, educators, partners, funders, policymakers, and the general public, must form the foundation. Effective key messages and communications tools are essential. In addition, strategies like impact storytelling, effective champions/ambassadors, media relations, and engaging multimedia content strategies can help build understanding and good will among audiences. Specific strategies identified for TBL will be based on its communications goals, target audiences, and the identified actions TBL wants its audiences to take.
- c) Contractor will provide ongoing communications support as requested by TBL in the form of event support, content and collateral development, campaign and messaging development, photo libraries, and any other communications support needs. Contractor will also serve as thought partners to TBL leadership and staff in determining communications strategies and approaches, as priorities and needs emerge.
- d) **Amendment 1- Area 2: Communications Implementation -Parent Website and PPT Template.**
The Big Lift has the opportunity to create a reading-focused website for parent audiences, which will support the strategic plan strategy related to family engagement in literacy development. This reading-focused website would be a companion to the regular The Big Lift website, which is focused on the entire initiative and targeted to all audiences. Contractor will create this website using the Oakland Reads website as a template. The Big Lift’s reading website will be branded as The Big Lift, with content updated and created to be tailored to The Big Lift and San Mateo County. Additionally, Contractor will develop a brand PowerPoint template to support The Big Lift’s communications, and/or any emerging priorities for communications support, as identified by The Big Lift.
- e) **Amendment 2- Area 2: Let’s Read Promotional Campaign.** The campaign will include: paid digital media, earned digital media, and paid outdoor/transit advertising. It will also include

partnership-based approaches including distributing bookmarks and posters and/or promotional stands. Contractor will work with The Big Lift to develop campaign language and assets, produce materials, place ad buys, and monitor the campaign. The Big Lift will lead partner engagement and distribution efforts. The included budget is intended to cover an 8-week outdoor ad run, and digital ads, as well as production costs.

7) Area 3: Campaigns/Launches/Messaging (Years 1-2)

- a) Contractor's approach to developing campaigns is to work with TBL to identify the key goals, audiences, strategic priorities, and calls-to-action for the campaign (meaning, a suite of communications focused on one topic or priority). Then we determine the appropriate strategies, content, and collateral to advance the goals of the campaign and engage the audiences. Depending on the campaign, strategies to be developed could include videos, animations, newsletters, storybanking, social media sets, talking points and presentations, one-pagers or brochures, op-ed drafts and placements, blog posts, web content, ad buys, etc.
- b) Contractor will then develop a campaign implementation timeline and strategy and manage the execution and sharing of the materials and the engagement of any public comment to bring more people to the resources and opportunities being promoted through the campaign. Anticipated focuses for campaigns may include:

- i) Fund Development Campaign - a multi-faceted fund development campaign
- ii) Equity Framework Campaign - support communications about TBL's Equity Framework
- iii) Additional campaigns as identified during the communications planning process or with TBL leadership and staff over the course of the contract.

8) Branding and Website Refresh (Year 2)

- a) Contractor will develop a brand platform for The Big Lift based on the inputs from key stakeholders and findings from the communications audit collected during the discovery phase. The brand platform is a foundational, internal document that will establish the desired positioning and anchor messaging for TBL's brand. Contractor will ensure that the messaging for TBL embeds REDI messaging and principles in all communications efforts to fulfill TBL's goals, determined during the discovery phase.
- b) If indicated through the discovery process, Contractor will also propose and workshop a visual brand (that could include a new logo, new brand visual guidelines, and/or updated color scheme) that visually represents TBL's brand positioning. As part of refreshing the brand, Contractor would create a suite of evergreen materials and templates that can be used by the Big Lift staff to create collateral, including but not limited to, powerpoint templates, stationary templates, flyer templates, social media graphic templates, talking points, and elevator pitches, customizable to identified key audiences.

- c) Contractor will recommend updates to the website and other communications channels, based on the results of the audit, to bring those materials into compliance with the brand.
- d) **Amendment 2 – Area 3: Additional Implementation Priorities.** To support growth of The Big Lift’s digital platforms and achieve goals from the communications plan, time is allocated in this budget to support areas of work that are identified as additional priorities for implementation. This may include:
 - i) Light-touch audience growth campaign, including ad budget and time to manage these ads. Ads will leverage existing organic posts to drive audience growth and engagement.
 - ii) Email outreach platform to enhance email functionality beyond Outlook and enable the development of a contact relationship management (CRM) system.
 - iii) Educator resources hub to support The Big Lift team in the development of an online hub where resources for partners, educators, and workgroups can be organized and accessed.
 - iv) Inspiring Summers 10-year recognition content and additional communications support.

Exhibit B1—Payments and Rates

In consideration of the services provided by Contractor described in Exhibit A1 and subject to the terms of the Agreement, County shall pay Contractor based on the following fee schedule and terms:

- 1) Invoice County upon completion of services shown in Exhibit A1 based on the rates below.
Contractor will submit itemized invoices electronically to Katharine Sullivan, The Big Lift Executive Director, ksullivan@smcgov.org, by the 20th of each month for the previous month's services. Due to County year-end close, invoice(s) for June services are due by July 5th. Invoice(s) must include, at a minimum, the following:
 - a) Vendor Address
 - b) HSA Administrative Address: 500 County Center, 2nd FL Redwood City, CA 94063
 - c) Remit payment address
 - d) Agreement Number: 70100-24-D00201
 - e) Itemized list of services provided
 - f) Cost of Service – Total Project Rate, Position Type and Rate (hourly/total)
- 2) Payment is dependent on submission of supporting documentation. Payment may be delayed if supporting documentation is not received. Invoices must be accompanied by a line-item accounting for monthly expenses and evidence of work performed, or costs incurred including but not limited to timesheets, copies of bills, and/or packing slips.
- 3) Rates & Budget
 - a) Rates

Role	Hourly Rate Year 1	Hourly Rate Year 2
Partner		\$350
Director		\$260
Director, Communications	\$250	\$260
Senior Manager/ Senior Consultant		\$245
Senior Associate Consultant, Communications	\$200	\$210
Consultant, Communications & Graphic Design	\$215	\$225
Consultant /Finance Manager		\$225
Consultant, Community Engagement	\$215	\$225
Senior Associate Consultant		\$210
Associate Consultant	\$165	\$175
Finance Manager	\$215	\$225

*Rates are inclusive of travel costs.

b) Budget

i) Year 1

Year 1 (original amount)		\$100,000
<i>Additional activity: Amendment 1</i>		
1.	Focus Group Facilitation and Recruitment/ Coordination	\$8,000
2.	Website Development and PPT Template	\$38,000
3.	Focus Group Incentives (for additional group)	\$1,000
Total (original & Amendment 1)		\$147,000

ii) Year 2

Year 2 (original amount)		\$100,000
<i>Additional Implementation Priorities: Amendment 2</i>		
1.	Event Material Design and Production <ul style="list-style-type: none"> Strategic Plan Event posters and materials 2025 event materials 	\$12,680
2.a.	Let's Read Campaign Development Advertising (Paid and Earned Digital and Transit) <ul style="list-style-type: none"> Creative development of ads for all placements Coordination of ad buys (transit and digital) Management of digital ads 	\$58,000
2.b.	Let's Read Campaign Development Partner Outreach (Design and Production) <ul style="list-style-type: none"> Production coordination of bookmarks Design of posters/ display stands Translation Production coordination of posters/ display stands 	\$6,425
3.a	Audience Growth Campaign <ul style="list-style-type: none"> Monthly boosting of posts to reach new audience 	\$4,600
3.b	Email Outreach Platform <ul style="list-style-type: none"> Support to set up platform Development of 2-3 email templates 	\$4,250
3.c	Educator Resource Hub <ul style="list-style-type: none"> Exact specification TBD; may include development of multiple webpages to support educators and workgroup/ convenings 	\$10,000

	<ul style="list-style-type: none"> • Technical assistance to TBL team and how-to-guide 	
3.d	Inspiring Summers Content, etc. <ul style="list-style-type: none"> • Content support for Inspiring Summers 10-year anniversary • Other support as arises 	\$4,000
Total (Original & Amendment 2)		\$199,955

- iii) Contractor will be reimbursed at cost for associated expenses to specific projects with prior authorization from the County and submission of supporting documentation (receipts), including but not limited to incentives for focus groups, translation services, etc.
- iv) Contractor will bill hourly using corresponding contract rates. Only actual time spent will be billed, not to exceed the total shown in the above tables.

4) County will:

- a) Have the option to modify or add related services, and adjust costs accordingly to meet its project goals, as agreed upon by both parties in writing as long as it does not exceed the total agreement obligation. The cost to provide additional services will be determined at the time of request and pre-approved by both parties.
- b) Pay Contractor upon receipt and approval of invoice(s) and back-up documentation for services shown in Exhibit A1.
- c) Have the option to adjust funding across line items in the Budgets shown in Exhibit B1 and across fiscal years as agreed upon by both parties and approved by the County in writing as long as it does not exceed the total agreement obligation.