# Request for Proposal (RFP) Response

## HB 3506 Community Engagement And Outreach Services

## Oregon Department Of Revenue

## OregonBuys Bid Number S-15000-00014978

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## Table of Contents


1 Executive Summary ..... 2
2 Project Implementation Plan ..... 3
2.1 Understanding of Scope of Services ..... 3
2.2 Implementation Approach ..... 4
2.2.1 Task-Based Implementation Approach ..... 6
2.3 Work Plan and Timeline ..... 7
2.4 Monitoring and Evaluation Plan ..... 9
2.5 Resource and Staffing Plan ..... 9
2.6 Risk Management and Quality Control ..... 11
2.7 Conclusion and Next Steps ..... 12
3 Campaign Plan/ Outreach Plan ..... 12
3.1 Campaign Overview and Outreach Strategy ..... 13
3.2 Target Audience Identification ..... 14
3.3 Outreach Channels and Communication Methods ..... 14
3.4 Community Partner Engagement Strategy ..... 15
3.5 Accessible and Multilingual Communication Plan ..... 15
3.6 Paid Advertising and Awareness Campaign Strategy ..... 16
3.7 Community Education Events Strategy ..... 16
3.8 Performance Metrics and Success Measurement ..... 16
3.9 Long-Term Sustainability Approach ..... 17
4 Key Persons and Resumes ..... 18
5 Attachments/ Forms ..... 20


## Table of Figures


Figure 1: Project 986 Implementation Strategy ..... 5
Figure 2: Project 986 Task-Based Implementation Approach ..... 6
Figure 3: Project 986 Work Plan and Timeline ..... 8
Figure 4: Project 986: Path to Innovation ..... 12
Figure 5: Project 986 Campaign/Outreach Plan ..... 13


## List of Tables


Table 1: Project 986 Resource & Staffing Summary Table ..... 10
Table 2: Project 986 Risk Mitigation Plan ..... 11

# 1 Executive Summary

Project 986 Consulting LLC, headquartered in Derwood, Maryland, is an **SBA Certified firm, a Certified Women's Business Enterprise (WBENC), Minority-Owned, and a Small Business Entity**. Since its founding in 2017, the firm has delivered community engagement, strategic planning, public outreach, and organizational support services for public agencies, nonprofit organizations, and community-based partners serving diverse populations across the United States.

Project 986 was formed to support organizations responsible for delivering **public services that require trust, accessibility, and strong community participation**. Our work focuses on helping agencies improve communication, strengthen stakeholder engagement, and ensure that programs and services reach the communities they are intended to serve. Over time, the firm developed an outreach and planning approach grounded in equity-centered, trauma-informed, accessible, and community-based methods that improve participation, reduce barriers, and support measurable long-term outcomes.

**Project 986 Executive Summary Snapshot**

- **Certified Firm:** SBA Certified, WBENC Certified, Minority-Owned, and Small Business Entity.
- **Proven Experience:** Delivered similar outreach projects for public agencies and underserved communities.
- **Targeted Strategy:** Identify–Engage–Sustain model using outreach, advertising, and community education.
- **Accessible Delivery:** Plain language, multilingual support, and full ADA/WCAG compliance.
- **Measurable Results:** Performance tracking, regular reporting, and long-term outreach recommendations.

These methods directly align with the needs of the Oregon Department of Revenue for HB 3506 Community Engagement and Outreach Services supporting the Senior and Disabled Citizen's Property Tax Deferral Program. This project requires more than standard marketing. It requires a consultant that understands how to engage seniors, individuals with disabilities, limited-English-speaking households, and underserved communities through trusted relationships, accessible communication, and practical education efforts that improve awareness and participation.

Project 986 has direct experience leading similar public outreach and strategic planning efforts that closely mirror the Department's required scope of work. For **Island Healthcare in Martha's Vineyard**, we led a health equity initiative focused on underserved populations through stakeholder interviews, surveys, focus groups, community dialogue sessions, outreach metrics, and final reporting. For the **Washington State Housing Finance Commission**, we supported affordable housing planning through culturally responsive engagement, public input collection, and reporting focused on vulnerable and low-income residents, an especially strong match because both efforts support housing stability and helping residents remain in their homes. We also delivered end-to-end community outreach and strategic planning support for the **NAACP - City of Cleveland, Riverside Community Care in the Gulf of Mexico region**, and the **Lake Champlain Basin Region**, where we facilitated inclusive engagement, measurable outreach tracking, and decision-ready reporting across diverse and historically underserved communities. Across these engagements, we have consistently demonstrated the ability to build trust, improve participation, and deliver practical recommendations that support long-term public program success.

For this engagement, Project 986 will deliver a targeted, accessible, and equity-centered public awareness campaign designed to increase understanding and participation in the Senior and Disabled Citizen's Property Tax Deferral Program. Our approach is built around a clear three-part model: **identify, engage, and sustain**.

First, we identify the populations most likely to benefit from the program by assessing current awareness levels, reviewing existing Department outreach efforts, and identifying service gaps using **SWOT analysis and Results-Based Accountability (RBA) methods**. Special focus will be placed on seniors, individuals with disabilities, limited-English-speaking households, rural residents, and communities with limited access to digital information.

Second, we engage those communities through trusted community partners, accessible communication materials, targeted paid advertising, and community education events. Our campaign strategy includes plain language print and digital materials, multilingual outreach where needed, **ADA-compliant communications** that meet WCAG 2.1 Level AA standards, and targeted advertising through radio, newspapers, and community publications. We will work closely with senior service agencies, housing counselors, community centers, financial advisors, and nonprofit organizations that already serve these populations to strengthen trust-based referrals and improve participation.

Third, we sustain long-term awareness by creating reusable outreach tools, strengthening partner relationships, and providing the Department with practical recommendations for continued outreach after the contract period ends. Our goal is not only to complete a short-term campaign, but to help the Department build a sustainable system for ongoing public education and improved program access.

Project 986 will manage this work through a phased implementation structure that includes discovery and assessment, strategic planning, campaign development, outreach execution, performance monitoring, and final reporting. **Dr. Carmen Phelps** will serve as **Program Manager and Lead Consultant**, providing senior-led oversight across all phases of the project. Her experience in equity-centered community engagement, strategic planning, stakeholder facilitation, and public reporting ensures strong accountability, consistent delivery, and direct alignment with Department expectations.

Success for this project must be measurable. Using the **RBA framework**, we will track outreach performance through campaign reach, partner participation, event attendance, paid advertising engagement, multilingual access, and overall awareness outcomes. The Department will receive regular progress updates and a Final Summary Report with findings, lessons learned, and recommendations for sustaining awareness of the program over time.

Project 986 understands that this work is about more than outreach, it is about helping eligible Oregonians remain safely and securely in their homes by ensuring they understand and can access important public benefit. Our experience, implementation approach, and commitment to accessible, equity-centered engagement make us well-positioned to support the Department in delivering a practical, measurable, and sustainable public awareness campaign for communities across Oregon.

***What Sets Us Apart?***

***Project 986 delivers outreach that is practical, community-driven, and built on proven execution—not theory. Our experience on Island Healthcare (Martha's Vineyard), Washington State Housing Finance Commission, NAACP - City of Cleveland, Riverside Community Care, and Lake Champlain Basin Region demonstrates our ability to engage underserved populations, translate input into action, and produce clear results. We combine senior-led delivery with direct community engagement to ensure the right people are reached, the message is understood, and the program is used.***

# 2 Project Implementation Plan

## 2.1 Understanding of Scope of Services

Project 986 understands that the purpose of this engagement is to support the Oregon Department of Revenue in increasing public awareness of the Senior and Disabled Citizen's Property Tax Deferral Program as required under House Bill 3506. The goal is not only to inform eligible Oregonians about the program, but to ensure that seniors, individuals with disabilities, and communities facing access barriers can understand the program and apply for available support with confidence.

Many eligible residents may be unaware that the program exists, may not fully understand how the deferral process works, or may face barriers related to language access, disability access, digital access, or trust in government systems. This project requires more than standard marketing. It requires targeted community engagement, clear education, accessible communication, and strong partnerships with organizations that already serve these communities.

Project 986 understands that the work must include four connected areas: strategic planning, communications development, performance tracking, and direct community outreach. This includes assessing current awareness levels, identifying the most relevant target audiences, developing a practical public awareness campaign, creating **ADA-compliant and multilingual outreach materials, managing paid advertising placement, and organizing education sessions with trusted community partners.**

We also understand that the Department has existing outreach efforts already in place, including its public website, outreach flyers, and annual partnership engagement with DHS Senior and Disabled Services regional ADRC centers. Our approach will focus on strengthening outreach beyond these existing activities by building new targeted engagement strategies that increase reach and improve program understanding among underserved populations.

Accessibility is a core requirement of this project. All communication materials, digital tools, and outreach methods must meet ADA Title II expectations and WCAG 2.1 Level AA standards. This includes ensuring materials are usable by individuals who are blind, have low vision, are Deaf, Hard of Hearing, use assistive technology, or primarily communicate in a language other than English. Accessibility must be built into planning from the start, not added later.

Success for this project must be measurable. The Department requires clear reporting on campaign reach, partner engagement, education event participation, and overall awareness outcomes. Project 986 understands that deliverables must lead to practical long-term use, including sustainable outreach materials, stronger community partner relationships, and clear recommendations for continued engagement after the contract period ends.

Our role is to help the Department deliver an outreach campaign that is clear, accessible, equitable, and effective, one that helps eligible Oregonians understand and use a program designed to help them remain in their homes and maintain long-term housing stability.

## 2.2 Implementation Approach

Project will deliver this project through a structured, measurable, and community-centered implementation approach (in ***Figure 1: Project 986 Implementation Strategy***)that connects planning, communication, outreach, and reporting into one coordinated process. Our approach is designed to ensure that the Senior and Disabled Citizen's Property Tax Deferral Program reaches eligible Oregonians through clear messaging, trusted partnerships, accessible communication, and consistent performance tracking.

Because this project involves public education, behavior change, and community trust-building, our implementation approach will use a combination of practical engagement frameworks that support both strategy development and measurable results.

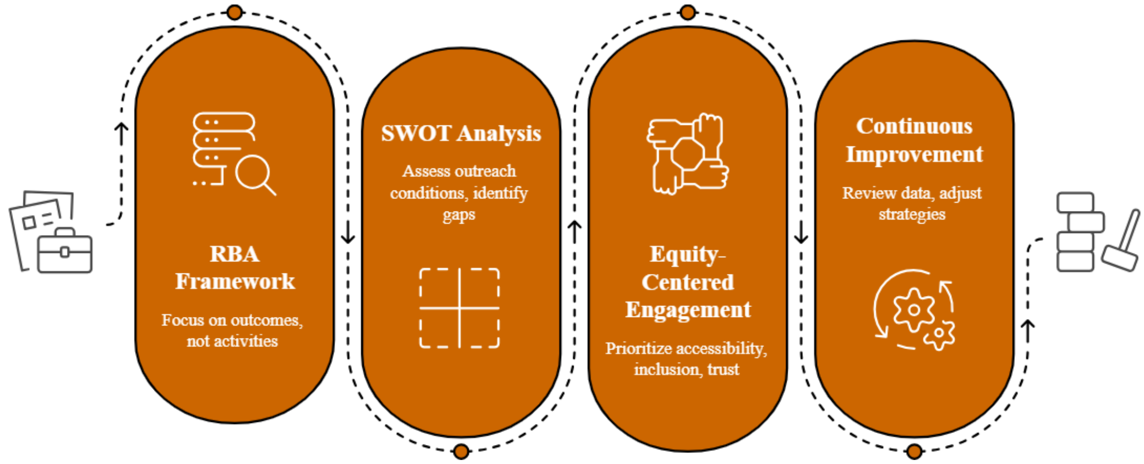


*Figure 1: Project 986 Implementation Strategy*

1. **Results-Based Accountability (RBA):** Project 986 will use the Results-Based Accountability (RBA) framework to keep the project focused on outcomes rather than activities alone. RBA helps answer three important questions:

- How much did we do?
- How well did we do it?
- Is anyone better off?

This framework supports the Department's requirement for measurable outreach performance by ensuring that campaign activities are tied directly to outcomes such as increased awareness, stronger community partner participation, improved accessibility, and higher engagement with eligible residents. It also supports regular progress reporting and final recommendations.

2. **SWOT Analysis for Outreach Planning:** At the beginning of the project, we will use a SWOT analysis (Strengths, Weaknesses, Opportunities, and Threats) to assess current outreach conditions. This helps identify what existing awareness efforts are working well, where communication gaps exist, which communities remain underserved, and what barriers may prevent participation. This framework helps prevent duplication of existing Department outreach efforts and allows the campaign plan to focus on new strategies that create additional value.

3. **Equity-Centered Community Engagement Model:** Because the target population includes seniors, people with disabilities, and communities facing language and access barriers, Project 986 will use an equity-centered engagement model that prioritizes accessibility, inclusion, and trust. This means outreach strategies will be built around the lived experiences of impacted communities rather than standard mass communication methods. This includes plain language communication, multilingual access, ADA-compliant design, trusted community partnerships, and multiple engagement methods including in-person, virtual, and print-based outreach.

4. **Continuous Improvement Model:** Throughout the contract period, Project 986 will apply a continuous improvement process by reviewing outreach performance data regularly and adjusting campaign strategies as needed. If certain communication channels underperform or if community participation is lower than expected, outreach methods will be refined quickly to improve results rather than waiting until the end of the project. This approach ensures flexibility, stronger performance, and better use of project resources.

Using these frameworks together allows Project 986 to move beyond basic campaign delivery and provide a practical system for planning, execution, measurement, and long-term improvement. Each required task under this RFP will be managed using this structure to ensure the Department receives clear deliverables, measurable outcomes, and sustainable outreach tools that continue to support the program after the contract period ends.

### 2.2.1 Task-Based Implementation Approach

Project 986 will manage each task under this contract through a phased and measurable approach that aligns with the Department's required deliverables. Each activity will be tied to clear outcomes, accessibility standards, and reporting requirements to ensure the public awareness campaign produces practical and lasting results.

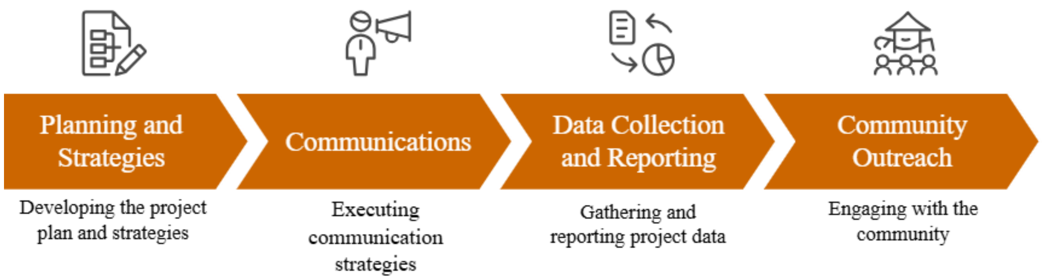


*Figure 2: Project 986 Task-Based Implementation Approach*

### 1. Task 1: Planning and Strategies:

Project 986 will begin with a structured discovery and planning phase to understand current awareness levels of the Senior and Disabled Citizen's Property Tax Deferral Program and identify the most effective outreach opportunities. Using the **SWOT Analysis framework**, we will review existing Department outreach efforts, identify strengths, service gaps, and communication barriers, while ensure we do not duplicate activities already in place. We will work closely with the Oregon Department of Revenue to understand past engagement efforts, available resources, and priority communities. We will then identify target audiences most likely to be eligible for the program, including seniors, individuals with disabilities, limited-English-speaking households, and communities facing access barriers.

This approach reflects our past work with **Island Healthcare in Martha's Vineyard**, where Project 986 led strategic public outreach focused on underserved populations by conducting stakeholder interviews, community surveys, and focus groups to assess awareness gaps and improve participation in planning decisions. We also supported the **Washington State Housing Finance Commission** through similar outreach planning focused on vulnerable and low-income populations affected by housing instability. These projects demonstrate our ability to assess community awareness, identify priority audiences, and develop practical outreach strategies that improve access to important public programs.

Guided by the **Equity-Centered Engagement Model**, we will develop a Public Awareness Campaign Plan that includes marketing materials, paid advertising strategies, community education efforts, timelines, and measurable performance indicators aligned with the **RBA framework.**

### 2. Task 2: Communications:

Project 986 will develop communication materials that are clear, accessible, and designed for long-term use by the Department. All print and digital materials will follow **ADA Title II requirements and WCAG 2.1 Level AA** standards to ensure equal access for all users, including individuals who use assistive technologies. Using the **Equity-Centered Engagement Model**, materials will be developed in plain language and translated where needed to improve understanding across diverse communities. Marketing assets may include flyers, brochures, social media graphics, email messaging, and paid advertising content for radio, television, and print placement.

Our experience with **Island Healthcare** supports this work, where transparent and accessible communication was central to the engagement strategy. Project 986 prepared clear documentation, community-facing outreach summaries, and reporting tools that helped residents from underserved communities understand and participate in planning processes. We focused on reducing participation barriers and ensuring communication methods were inclusive, understandable, and responsive to community needs.

We will also support the management of communication channels related to outreach efforts, ensuring messaging remains consistent, understandable, and accessible across all platforms and audiences.

### 3. Task 3: Data Collection and Reporting

Project 986 will apply the **RBA framework** to track outreach performance and measure project success. We will establish clear performance indicators at the start of the project, including campaign reach, advertisement engagement, community partner participation, event attendance, language accessibility reach, and audience response trends. Data will be collected across all outreach channels and reviewed regularly using a Continuous Improvement approach so that adjustments can be made during implementation if needed.

This process reflects our work with both **Island Healthcare and the NAACP - City of Cleveland**, where we developed engagement metrics to evaluate participation levels, representation, and the effectiveness of outreach activities. In both projects, we analyzed public input, identified major themes, and delivered written reports that supported informed decision-making and future planning. Our experience ensures that reporting is not limited to activity tracking but provides practical findings and recommendations that support long-term program improvement.

Regular progress updates will be provided to the Department, followed by a **Final Summary Report that includes findings, participation trends, outreach effectiveness, lessons learned, and recommendations for future communications.**

### 4. Task 4: Community Outreach

Community outreach will focus on building trust through partnerships with organizations that already serve the target population. Using the **Equity-Centered Engagement Model**, Project 986 will identify and engage community-based partners such as senior service agencies, housing counselors, financial advisors, community centers, and advocacy organizations that work directly with eligible residents. These trusted partners help improve awareness and reduce barriers to participation.

This approach reflects our work with **the NAACP - City of Cleveland and Riverside Community Care in the Gulf of Mexico region**, where we designed inclusive outreach strategies to engage historically underserved communities through stakeholder interviews, facilitated dialogue sessions, focus groups, and community education meetings. These efforts were built around trust, cultural sensitivity, and broad representation, ensuring that outreach reflected real community needs and priorities.

We will organize and facilitate educational meetings to help partners understand program eligibility, benefits, and how they can guide their clients through the process. Both virtual and in-person engagement methods will be used to maximize participation and improve accessibility across Oregon communities. This outreach approach strengthens long-term community connections and supports sustainable awareness beyond the contract period.

## 2.3 Work Plan and Timeline

Project 986 will manage this engagement through a phased work plan (in ***Figure 3: Project 986 Work Plan and Timeline***)that ensures all deliverables are completed in a clear, organized, and measurable manner. Our approach is designed to move from assessment and planning into implementation, active outreach, and final reporting while maintaining regular coordination with the Oregon Department of Revenue throughout the project period. Each phase builds on the previous one to ensure that outreach strategies are informed by real community needs, accessibility standards, and measurable performance outcomes. This phased structure also supports flexibility, allowing adjustments to be made as outreach results are reviewed during implementation.

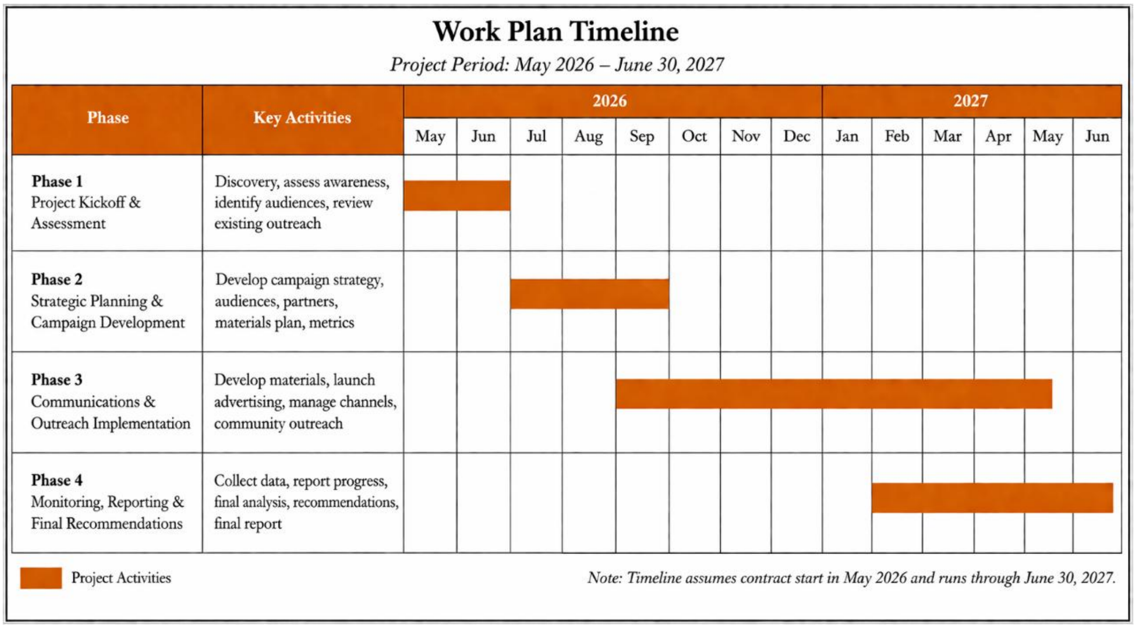


***Figure 3: Project 986 Work Plan and Timeline***

1. **Phase 1 - Project Kickoff, Discovery, and Assessment (May - June 2026):** The project will begin with kickoff meetings and a full discovery phase to establish priorities, review existing Department outreach activities, and confirm project expectations. During this stage, Project 986 will gather background information, review current communication efforts, identify known service gaps, and assess awareness levels of the Senior and Disabled Citizen's Property Tax Deferral Program. Using the SWOT Analysis framework, we will identify strengths, weaknesses, opportunities, and outreach barriers to ensure the campaign focuses on areas where the greatest impact can be achieved. Initial stakeholder coordination and audience identification will also be completed during this phase.
2. **Phase 2 - Strategic Planning and Campaign Development (July - September 2026):** Following the assessment phase, Project 986 will develop the Public Awareness Campaign Plan and Schedule of Marketing Activities. This phase includes defining target audiences, selecting outreach channels, identifying community partners, and establishing measurable performance indicators using the Results-Based Accountability (RBA) framework. Campaign strategies will include accessible marketing materials, paid advertising recommendations, outreach events, and multilingual communication plans. Timelines, approval workflows, and reporting structures will also be finalized to support efficient project execution.
3. **Phase 3 - Communications Development and Outreach Implementation (September 2026 - May 2027):** Once the campaign plan is approved, Project 986 will move into active implementation. This phase includes developing ADA-compliant outreach materials, coordinating advertising placement, managing communication channels, and launching community engagement efforts. Using the Equity-Centered Engagement Model, all materials will be designed in plain language and accessible formats that support diverse audiences, including seniors, individuals with disabilities, and limited-English-speaking communities. Community partner meetings, educational sessions, and both virtual and in-person outreach events will be organized during this phase to expand awareness and improve trust-based engagement.

4. **Phase 4 - Monitoring, Reporting, and Final Recommendations (February - June 2027):** Throughout implementation, Project 986 will collect and review outreach data using the Continuous Improvement approach to monitor campaign effectiveness and make adjustments where needed. Performance indicators such as engagement reach, partner participation, event attendance, and communication effectiveness will be tracked regularly. Mid-project progress reports will be provided to the Department to support transparency and decision-making. At project close, we will submit a Final Summary Report that includes findings, outreach results, key themes, lessons learned, and practical recommendations for sustaining long-term program awareness beyond the contract period.

This phased work plan ensures that all required deliverables are completed with clear accountability, strong coordination, and measurable results. By aligning planning, outreach execution, accessibility compliance, and reporting within one structured timeline, Project 986 will support the Department in delivering a public awareness campaign that is effective, equitable, and sustainable for Oregon communities.

## 2.4 Monitoring and Evaluation Plan

Project 986 will use a structured **Monitoring and Evaluation Plan to ensure all outreach activities are measurable, transparent, and aligned with the goals of the Oregon Department of Revenue.** Using the **Results-Based Accountability (RBA) framework**, we will track not only the volume of outreach activities completed, but also the quality of engagement and the overall impact on program awareness among eligible Oregonians.

At the start of the project, we will establish clear performance indicators for each outreach activity. These will include campaign reach, advertising performance, community partner participation, event attendance, engagement across communication channels, and accessibility reach for **multilingual and ADA-compliant materials**. These measures will help determine how effectively the campaign is reaching seniors, individuals with disabilities, and other underserved communities.

Project 986 will collect and review data regularly across all communication and outreach channels, including digital engagement, print distribution, partner participation, and education event outcomes. Mid-project progress reports will be provided to the Department to summarize completed activities, findings, and any recommended adjustments. Using a Continuous Improvement approach, outreach strategies will be refined during implementation if results show lower engagement or missed target audiences.

At project close, we will provide a **Final Summary Report** that includes outreach performance results, key findings, participation trends, lessons learned, and recommendations for future communications. This ensures the Department receives both short-term campaign results and long-term guidance for sustaining awareness of the Senior and Disabled Citizen’s Property Tax Deferral Program.

## 2.5 Resource and Staffing Plan

Project 986 will deploy **a focused and experienced team** structure designed to support efficient execution of all project tasks under the **HB 3506 Community Engagement and Outreach Services** contract. The firm operates with a lean, senior-led delivery model in which experienced personnel are directly responsible for project planning, community engagement, communications oversight, reporting, and final deliverable development. This approach ensures consistency across all phases of the project, reduces handoff risks, and maintains quality control from project kickoff through final reporting.

Project 986 maintains in-house capability to support all components of this engagement, including public awareness campaign planning, stakeholder engagement, outreach coordination, accessibility-centered communication, data collection, and performance reporting. Our staffing approach prioritizes continuity, with the same lead consultant overseeing all major phases of the work. This ensures that knowledge gained during early assessment and planning is retained and applied throughout implementation, improving efficiency and strengthening project outcomes.

## Key Personnel and Responsibilities:
## Dr. Carmen Phelps - Program Manager & Lead Consultant

Dr. Carmen Phelps will serve as the Program Manager and Lead Consultant for this engagement and will be responsible for overall project leadership, execution, and delivery of all required outputs. She will oversee the full lifecycle of the project, ensuring that all activities are completed on schedule, aligned with the Scope of Work, and meet the expectations of the Oregon Department of Revenue.

Dr. Phelps will lead the planning and strategy phase, including review of existing Department outreach efforts, assessment of current community awareness levels, and identification of target audiences most likely to benefit from the Senior and Disabled Citizen's Property Tax Deferral Program. She will guide the development of the Public Awareness Campaign Plan, including outreach priorities, paid advertising strategies, community education planning, and measurable performance indicators.

She will be responsible for designing and managing the stakeholder and community engagement process, including identification of community partners, facilitation of outreach meetings, development of engagement tools, and oversight of community education sessions. Dr. Phelps will ensure that engagement efforts are inclusive, equity-centered, and accessible for seniors, individuals with disabilities, and underserved populations across Oregon.

In addition, Dr. Phelps will oversee the development of ADA-compliant and multilingual communication materials, ensuring all outreach materials meet ADA Title II requirements and WCAG 2.1 Level AA standards. She will also direct data collection and reporting activities, including tracking campaign performance, analyzing outreach results, preparing progress reports, and delivering the Final Summary Report with findings and recommendations.

Throughout the project, Dr. Phelps will serve as the primary point of contact for the Department, responsible for project coordination, status updates, issue resolution, and maintaining alignment with project expectations. Her direct involvement across all phases supports continuity, accountability, and strong project control.

***Senior-Led Delivery, Direct Accountability***

***Project 986 provides a highly qualified lead who serves as both Program Manager and Lead Consultant, ensuring continuity across all phases of the contract. This model reduces communication gaps, strengthens accountability, and ensures that planning, outreach, reporting, and final deliverables are led by experienced personnel from start to finish.***

**Capacity and Availability:** Project 986 confirms that sufficient staff capacity is available to complete this engagement within the required contract period. Dr. Phelps will maintain continuous involvement throughout the project, with increased engagement during campaign planning, community outreach execution, performance evaluation, and final reporting.

The firm's structure allows for flexible allocation of internal resources based on project needs, ensuring workload demands are met without affecting quality or timelines. All personnel assigned to this project will remain available for the duration of the contract period, and continuity will be maintained throughout the engagement.

***Table 1: Project 986 Resource & Staffing Summary Table***

| Role | Name | Key Responsibilities | Level of Effort |
|---|---|---|---|
| **Program Manager & Lead Consultant** | Dr. Carmen Phelps | Overall project leadership; outreach planning; campaign strategy development; stakeholder engagement; community partner coordination; ADA-compliant communications oversight; data | High (Continuous involvement across project lifecycle) |

| | | | |
|---|---|---|---|
| | | analysis; reporting; final deliverables; primary client coordination | |
| **Internal Support Resources** | Project 986 Team | Stakeholder scheduling; outreach coordination; communication support; data organization; report formatting; administrative and document preparation support | Moderate (Flexible, task-based support) |

## 2.6 Risk Management and Quality Control

Project 986 will apply a proactive **Risk Management and Quality Control** process to ensure the successful delivery of all project activities, timelines, and required deliverables. Because this project involves public outreach, accessibility compliance, community engagement, and performance reporting, early identification of risks is critical to maintaining schedule, quality, and compliance. Our approach focuses on preventing issues before they affect project outcomes while ensuring all work meets the expectations of the Oregon Department of Revenue and the requirements of HB 3506.

**Quality control** will be **built into each phase** of the project through internal review procedures, regular status meetings, approval checkpoints, accessibility verification, and performance monitoring. All outreach materials will be reviewed for plain language, **ADA Title II compliance, WCAG 2.1 Level AA standards,** accuracy, and consistency before release. Progress reports and final deliverables will also undergo management reviews to ensure completeness and reliability before submission.

***Table 2: Project 986 Risk Mitigation Plan***

| Risk Area | Potential Impact | Mitigation Strategy | Quality Control Measure |
|---|---|---|---|
| **Limited community awareness or low engagement** | Reduced campaign reach and lower participation | Use trusted community partners, targeted messaging, and multiple outreach channels to improve awareness | Regular review of outreach participation and engagement metrics |
| **Delays in approvals or feedback** | Project timeline disruption | Establish clear approval timelines and regular coordination meetings with the Department | Weekly status tracking and milestone review |
| **Accessibility compliance gaps** | Non-compliance with ADA Title II and WCAG standards | Conduct accessibility checks during content development, not after completion | Internal ADA/WCAG compliance review before publication |
| **Language access barriers** | Eligible residents may not understand program information | Prioritize plain language writing and multilingual materials based on target audience needs | Translation review and readability checks before release |
| **Low attendance at community education events** | Reduced outreach effectiveness | Use both virtual and in-person options and partner referrals to increase participation | Attendance tracking and post-event participation review |
| **Third-party vendor performance issues** | Delays in advertising placement or communication delivery | Maintain clear vendor expectations, schedules, and oversight throughout implementation | Vendor performance monitoring and documented approval process |

This approach ensures that Project 986 maintains strong project control, protects delivery timelines, and provides consistent, high-quality services throughout the contract period. Our focus is to reduce risk early, maintain compliance at every stage, and deliver reliable results that support long-term public awareness and program access.

## 2.7 Conclusion and Next Steps


*Figure 4: Project 986: Path to Innovation*

Project 986 is prepared to support the Oregon Department of Revenue in delivering an accessible, measurable, and community-centered public awareness campaign for the Senior and Disabled Citizen's Property Tax Deferral Program. Our implementation approach is designed to align planning, communications, outreach, reporting, and accessibility compliance into one clear and manageable process that supports both immediate outreach goals and long-term program awareness.

By combining structured planning, equity-centered engagement, ADA-compliant communications, trusted community partnerships, and continuous performance monitoring, we will help ensure that eligible seniors and individuals with disabilities receive clear information and meaningful access to this important program. Our focus is not only on completing required deliverables, but on creating sustainable outreach tools and stronger community connections that continue to support the Department beyond the contract period.

Upon contract award, Project 986 will begin with project kickoff meetings, stakeholder coordination, review of existing outreach efforts, and confirmation of priorities, timelines, and reporting expectations. From there, we will move into assessment, campaign planning, implementation, and ongoing reporting with regular collaboration throughout the project lifecycle.

Our goal is to deliver practical results, strong accountability, and a public awareness campaign that helps more eligible Oregonians understand and benefit from the program designed to help them remain safely and securely in their homes.

# 3 Campaign Plan/ Outreach Plan

Project 986's equity-centered outreach campaign is designed to increase awareness and participation in the Senior and Disabled Citizen's Property Tax Deferral Program by ensuring clear, accessible information reaches eligible Oregonians through trusted channels and community partnerships. The Outreach Plan includes nine main parts which are discussed below in detail:

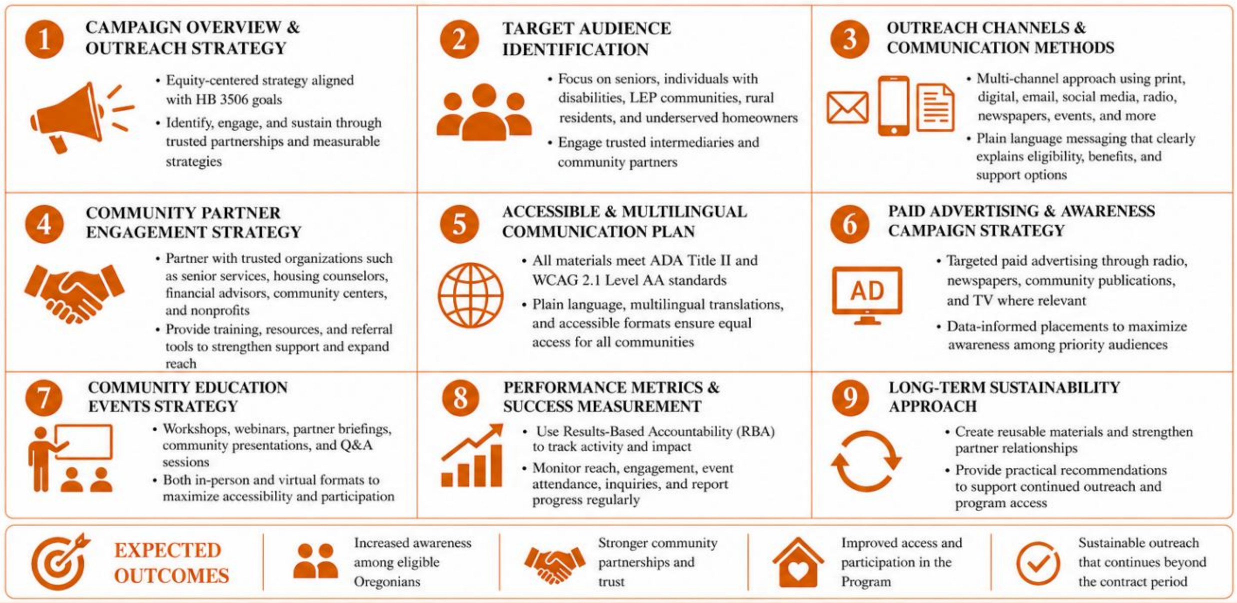


***Figure 5: Project 986 Campaign/Outreach Plan***

## 3.1 Campaign Overview and Outreach Strategy

Project 986 will deliver a **targeted, accessible, and equity-centered public awareness campaign** designed to increase understanding and participation in the Senior and Disabled Citizen's Property Tax Deferral Program for eligible Oregonians. Our outreach strategy is built to support the goals of HB 3506 by ensuring that seniors, individuals with disabilities, and communities facing language, technology, or trust barriers can access clear information about the program and understand how it helps them remain safely and securely in their homes.

The campaign will focus on increasing awareness, improving understanding, and strengthening trust through a combination of strategic communications, community partnerships, paid advertising, and direct education efforts. Rather than relying only on broad public messaging, Project 986 will use targeted outreach methods that prioritize the populations most likely to be eligible but least likely to receive or act on traditional government communication.

Our strategy follows a **three-part outreach model: identify, engage, and sustain**. First, we **identify** priority audiences and underserved communities through demographic review, stakeholder input, and assessment of current awareness gaps. Second, we **engage** those communities through trusted local partners, accessible communication materials, multilingual messaging, and both virtual and in-person education opportunities. Third, we **sustain** awareness by creating reusable outreach tools, strengthening partner relationships, and providing the Department with practical recommendations for continued long-term engagement beyond the contract period.

This approach is guided by the **Results-Based Accountability (RBA) framework** to ensure that campaign activities are tied to measurable outcomes. Outreach success will be evaluated not only by the number of materials distributed or events held, but by whether eligible residents better understand the program, whether trusted partners are equipped to support referrals, and whether awareness improves across underserved populations.

Our strategy also aligns with the Department's existing outreach efforts by building additional targeted engagement rather than duplicating current activities such as the public website, standard outreach flyers, and annual DHS/ADRC partnerships. This ensures that the campaign creates new value and expands reach where awareness gaps remain highest.

Project 986 has delivered similar outreach strategies through past engagements with **Island Healthcare, the NAACP - City of Cleveland, and the Washington State Housing Finance Commission**, where we successfully combined stakeholder engagement, public education, community partnerships, and measurable reporting to support underserved populations and improve equitable access to important public programs.

Our goal is to deliver a campaign that is practical, measurable, and sustainable, one that helps more eligible Oregonians understand the Property Tax Deferral Program and confidently access the support available to them.

## 3.2 Target Audience Identification

A successful outreach campaign begins with clearly identifying the individuals and communities most likely to benefit from the **Senior and Disabled Citizen's Property Tax Deferral Program**. Project 986 will use a **data-informed and equity-centered approach** to ensure outreach efforts are focused on the right audiences and delivered through the most effective channels.

The primary target audience includes **senior homeowners and homeowners with disabilities** who may qualify for property tax deferral but are unaware of the program, unsure of eligibility requirements, or hesitant to engage due to financial concerns, language barriers, disability access challenges, or limited trust in government programs. **Special attention will be given to residents living on fixed incomes, rural communities, limited-English-speaking households, and populations with reduced access to digital information.**

Secondary audiences include **trusted intermediaries** who regularly support these individuals, such as senior service agencies, housing counselors, financial advisors, tax preparers, insurance agents, accountants, retired employee associations, community centers, and local nonprofit organizations. These partners play a critical role in helping eligible residents understand the program and navigate the application process with confidence.

Project 986 will begin by reviewing available demographic and service area information, existing outreach data, and stakeholder input from the Oregon Department of Revenue to identify geographic areas and population groups where awareness gaps are likely to be highest. This process will be supported by our **SWOT Analysis framework** to evaluate existing strengths, barriers, and opportunities for improved outreach.

Our experience with Island Healthcare and the **Washington State Housing Finance Commission** demonstrates our ability to identify underserved populations and tailor outreach strategies around community needs rather than assumptions. In both projects, we used stakeholder interviews, surveys, and community engagement methods to ensure that outreach plans reflected real participation barriers and priority concerns.

By clearly defining both primary and secondary audiences early in the campaign, Project 986 ensures that outreach resources are directed where they will have the greatest impact, improving awareness, participation, and long-term program access for eligible Oregonians.

## 3.3 Outreach Channels and Communication Methods

Project 986 will use a multi-channel outreach strategy to ensure information about the Senior and Disabled Citizen's Property Tax Deferral Program reaches eligible residents through the communication methods they trust and use most often. Because many seniors and individuals with disabilities may not rely on digital platforms alone, outreach must include both traditional and modern communication methods to maximize reach and effectiveness.

Our communication strategy will include print materials such as **flyers, brochures, fact sheets, and mailed outreach pieces; digital materials including email messaging, social media graphics, and web-based content; and paid advertising through radio, local newspapers, and targeted community publications**.

Community education sessions, partner referrals, and in-person events will also serve as important communication channels.

Messaging will be developed in plain language and designed to clearly explain program eligibility, benefits, repayment structure, and application support options. Outreach materials will focus on reducing confusion and helping residents understand how the program supports long-term housing stability.

This approach reflects our past work with **Island Healthcare and the NAACP - City of Cleveland,** where Project 986 used mixed outreach methods including surveys, dialogue sessions, focus groups, written outreach materials, and community meetings to improve participation and public understanding.

By combining direct communication, trusted referrals, and accessible public education, the Department can improve awareness across communities that may otherwise be missed by standard outreach methods.

## 3.4 Community Partner Engagement Strategy

Trusted community partners are critical to the success of this campaign because many eligible residents are more likely to respond to organizations they already know than to direct government communication. Project 986 will build outreach around these trusted relationships to improve participation and reduce barriers to engagement.

We will identify and engage organizations such as senior service agencies, housing counselors, financial advisors, accountants, insurance agents, community centers, senior fraternal organizations, retired employee associations, and nonprofit advocacy groups that regularly serve seniors and individuals with disabilities. These partners help extend the Department's reach and improve trust-based referrals.

Project 986 will organize educational meetings and outreach sessions to help these partners understand program eligibility, benefits, and referral pathways so they can confidently support their clients and communities. Both virtual and in-person engagement methods will be used to maximize participation and accessibility.

This approach reflects our work with **Riverside Community Care and the NAACP - City of Cleveland**, where community partnerships were central to improving participation among underserved populations and ensuring broad representation in strategic planning efforts.

By strengthening these relationships, the Department gains sustainable outreach capacity that continues beyond the contract period.

## 3.5 Accessible and Multilingual Communication Plan

Accessibility is a core requirement of this project, not a separate task added later. Project 986 will ensure that all communication materials, outreach methods, and public education efforts meet ADA Title II requirements and WCAG 2.1 Level AA standards.

All print and digital materials will be designed to be perceivable, operable, understandable, and usable by individuals with diverse communication needs, including people who are blind, have low vision, are Deaf, Hard of Hearing, use assistive technology, or have cognitive and learning disabilities. Materials will be written in plain language to reduce confusion and improve usability for all audiences.

Where needed, multilingual communication materials will be developed to support communities that primarily communicate in languages other than English. Translation priorities will be based on identified target audience needs and geographic outreach priorities.

Project 986's equity-centered engagement model ensures accessibility is built into planning from the beginning. Our previous outreach work with underserved communities has consistently focused on reducing participation barriers, improving understanding, and ensuring communication is inclusive and community-centered.

This approach helps ensure that eligible residents receive the same information with equal effectiveness and ease, regardless of language or disability access needs.

## 3.6 Paid Advertising and Awareness Campaign Strategy

Paid advertising will be used strategically to reach eligible residents who may not engage through direct Department communication or partner referrals alone. The goal is not broad mass advertising, but targeted awareness in locations and media channels most likely to reach seniors and homeowners with disabilities.

Project 986 will recommend and manage placement across appropriate local channels such as radio, newspapers, community publications, and selected television opportunities where relevant. Messaging will be simple, direct, and focused on awareness of program availability, homeowner stability, and where to find support.

Advertising placement decisions will be based on **audience demographics, community access patterns, and feedback from local partners** to ensure resources are used efficiently. We will prioritize high-impact placements rather than broad low-value visibility.

Using the **RBA framework**, ad performance will be tracked through reach, engagement, inquiries, and referral outcomes to ensure advertising contributes to measurable awareness improvements rather than activity alone.

This targeted strategy supports stronger return on outreach investment and helps the Department reach residents who may otherwise remain unaware of the program.

## 3.7 Community Education Events Strategy

**Community education is essential because awareness alone does not always lead to participation**. Many eligible residents and service providers need clear explanation and direct opportunities to ask questions before acting.

Project 986 will organize and facilitate educational meetings for both community partners and eligible residents to improve understanding of the program, eligibility requirements, repayment structure, and application support options. These sessions will be designed to reduce uncertainty and build confidence in using the program.

Events may include workshops with senior centers, housing counseling sessions, virtual webinars, community presentations, and partner briefings. Both in-person and virtual formats will be used to maximize accessibility across Oregon communities.

Our experience across **Martha's Vineyard, Cleveland, and the Gulf of Mexico** region demonstrates our ability to facilitate inclusive education sessions that improve participation and help organizations turn awareness into action.

These events strengthen trust, improve referrals, and help ensure outreach results in actual program access.

## 3.8 Performance Metrics and Success Measurement

Project 986 will use the **RBA framework** to ensure campaign performance is measured clearly and consistently. We will focus on both activity and impact, tracking not only what was completed but whether awareness and engagement improved.

Performance indicators will include campaign reach, paid advertising performance, number of outreach materials distributed, partner participation levels, event attendance, multilingual accessibility reach, digital engagement, and feedback from community education efforts. These measures help determine whether the campaign is reaching the right audience and producing meaningful results.

Regular progress reports will be provided to the Department throughout implementation, allowing adjustments to be made through our Continuous Improvement approach if certain channels underperform or participation gaps remain.

At project close, Project 986 will deliver a Final Summary Report with findings, participation trends, outreach effectiveness, lessons learned, and recommendations for future communications.

This reporting structure ensures transparency, accountability, and stronger long-term planning for continued public awareness.

## 3.9 Long-Term Sustainability Approach

The goal of this project is not only to complete a short-term campaign, but to strengthen the Department's long-term ability to maintain awareness of the Property Tax Deferral Program after the contract ends.

Project 986 will create reusable outreach materials, standardized communication tools, and practical engagement strategies that can continue supporting the Department beyond the initial campaign period. Community partner relationships established during implementation will also serve as long-term referral networks for future outreach.

Final recommendations will include guidance on future advertising priorities, continued partner engagement opportunities, and methods for maintaining awareness among newly eligible residents over time.

This approach ensures the Department receives lasting value from the contract and builds a sustainable system for continued public education, improved accessibility, and stronger program participation across Oregon communities.

## 4 Key Persons and Resumes

**Name:** Dr. Carmen Phelps
**Position:** Program Manager / Community Engagement and Strategic Planning Consultant

### Professional Profile

Dr. Carmen Phelps is an equity-centered and trauma-informed community engagement consultant with extensive experience leading public outreach, strategic planning, and inclusive stakeholder engagement for government agencies, nonprofit organizations, and community-based partners. Her work focuses on designing and implementing outreach processes that improve equitable access to programs, services, and public resources for historically underserved populations.

For this project, Dr. Phelps will serve as Program Manager and Lead Consultant, overseeing project planning, stakeholder coordination, campaign development, community outreach, reporting, and quality control. Her experience aligns directly with the requirements of this RFP, including targeted outreach planning, community education, accessibility-centered engagement, performance reporting, and collaboration with diverse populations and service providers.

She has successfully supported community-centered policy development and outreach initiatives across multiple cities including New York, Detroit, Chicago, Cleveland, San Francisco, and Boston. Her work emphasizes trust-building, inclusive participation, multilingual access planning, and measurable outreach outcomes.

### Professional Values

- Trauma-informed active listening and engagement methods to improve understanding of lived experiences
- Honoring cultural traditions and value systems of diverse populations, including historically marginalized communities
- Patience, flexibility, and sensitivity in stakeholder engagement and facilitation
- Accurate representation of information reflecting the lived experiences of individuals supported
- Commitment to equitable access, plain language communication, and inclusive service delivery
- Protecting privacy and maintaining trust during community engagement processes
- Prioritizing wellness, resiliency, and respectful collaboration
- Building trust and long-term relationships to support sustainable outreach efforts
- Collaborative rather than extractive learning, discovery, and data-gathering processes
- Commitment to justice-centered communication and community participation

### Core Competencies/Skills

- Designing and Facilitating Community Outreach Processes to Ensure Equity-Centered Objectives Are Met
- Designing and Facilitating Qualitative (Surveys, Focus Groups, Dialogues, Interviews, Listening Sessions) and Quantitative Data-Gathering Processes
- Developing Community-Centered Assessment Processes Informed by Community Engagement Input
- Processing and Analyzing Data Accumulated from Community Engagement Processes
- Advising on Trauma-Informed Community Engagement Strategies
- Prioritizing Collaborative, Justice-Centered Approaches to Community Engagement
- Developing Public Awareness Campaigns for Diverse and Underserved Populations
- Creating Accessible Communication Strategies Including Plain Language and Multilingual Outreach
- Ensuring ADA-Compliant and Inclusive Community Engagement Practices
- Preparing Reports and Presenting Findings for Specialized and Mixed Audiences
- Developing Social Justice Agendas and Campaigns Informed by Historically Underserved Populations
- Supporting Policies, Programs, and Resources that Prioritize Vulnerable Communities

## Accomplishments

- Worked with local governments and community stakeholders to develop equity-centered policies and outreach strategies aligned with public service goals across New York, Detroit, Chicago, Cleveland, San Francisco, and Boston
- Ensured the inclusion of underserved and historically marginalized community voices in program planning and decision-making processes
- Developed tools and resources that help clients sustain community-centered outreach and inclusive engagement practices
- Created practical frameworks and implementation guidelines to support long-term equity-focused program design
- Facilitated training sessions and provided technical support to organizations building stronger outreach systems for vulnerable populations
- Improved client reporting and engagement tracking systems to support measurable outreach outcomes and better decision-making

## History of Employment Experience

**Project 986 Consulting, LLC; Silver Spring, MD** **2017-present**
**Community Engagement & Outreach Consultant (Designing & Executing Equity-centered Community Outreach Processes)**

- Designed and led inclusive community engagement processes for strategic planning and public outreach initiatives
- Conducted interviews, surveys, focus groups, and dialogue sessions with diverse populations and community stakeholders
- Developed outreach metrics, analyzed engagement data, and produced reports summarizing public input and recommendations
- Supported public agencies and organizations in improving equitable access to services and programs
- Created sustainable outreach tools and frameworks for long-term community-centered program delivery

**Enterprise Community Partners; Columbia, MD** **2016**
**Racial Equity Consultant for Businesses, Markets & Teams**

- Facilitated equity-centered strategic planning and stakeholder engagement workshops
- Advised leadership on inclusive program design and community engagement strategies
- Analyzed participation data to improve outreach effectiveness among underserved populations
- Supported organizations in strengthening equitable decision-making processes

**College of Southern Maryland; La Plata, MD** **2015**
**Director of Center for Community Outreach & Office for Diversity, Equity & Inclusion**

- Led community outreach and engagement initiatives across diverse stakeholder groups
- Conducted stakeholder interviews and focus groups to support planning and program development
- Advised leadership on diversity, equity, inclusion, and community participation strategies
- Supported the design of programs focused on inclusive access and stronger representation

## Educational Background

- **PhD - American Literature, History & Culture**

George Washington University, Washington, DC

- **MA - American Literature, History & Culture**

Chicago State University

- **BS & BA - Ethnic Studies & Communications/Journalism**

Both undergraduate degrees earned from the University of Kansas, Lawrence, KS

# 5 ATTACHMENTS/ FORMS

Project 986 confirms that all required attachments and forms, as outlined in this solicitation, are included with this proposal submission and are organized in the same order specified in the RFP instructions.

The following documents are provided as part of this submission:

- **Attachment C - Proposer Information and Certification Sheet**
- **Attachment D - Reference Check Forms**
- **Attachment F - COBID Certification / Outreach Plan**
- **Attachment G - Responsibility Inquiry**
- **DOR Vendor Accessibility Questionnaire**

**Additionally, Attachment B - Disclosure Exemption Affidavit** is not included, as Project 986 is not claiming any portion of this proposal as confidential or exempt from disclosure. And the **Price Proposal (Attachment E)** is being submitted separately, in accordance with the RFP instructions, and is not included within the technical proposal.

# ATTACHMENT C — PROPOSER INFORMATION AND CERTIFICATION SHEET

**Legal Name of Proposer:** Project 986 Consulting, LLC

**Address:** 7213 Millcrest Terrace **City, State, Zip:** Derwood, MD 20855

**State of Incorporation:** Maryland **Entity Type:** LLC/ Sole Proprietor

**Contact Name:** Dr. Carmen Phelps **Telephone:** 202-489-4240 **Email:** cphelps@project986consulting.com

**Oregon Business Registry Number (if required):** Not Applicable

**Any individual signing below hereby certifies they are an authorized representative of Proposer and that:**

1. Proposer understands and accepts the requirements of this RFP. By submitting a Proposal, Proposer agrees to be bound by the Contract/Price Agreement terms and conditions in Attachment A and as modified by any Addenda, except for those terms and conditions that Agency has reserved for negotiation, as identified in the RFP.

2. Proposer acknowledges receipt of any and all Addenda to this RFP.

3. Proposal is a Firm Offer for 180 days following the Closing.

   *[Make sure this number matches section #.## in the RFP]*

4. If awarded a Contract/Price Agreement, Proposer agrees to perform the scope of work and meet the performance standards set forth in the final negotiated scope of work of the Contract/Price Agreement.

5. I have knowledge regarding Proposer's payment of taxes and by signing below I hereby certify that, to the best of my knowledge, Proposer is not in violation of any tax laws of the state or a political subdivision of the state, including, without limitation, ORS 305.620 and ORS chapters 316, 317 and 318.

6. Proposer does not discriminate in its employment practices with regard to race, creed, age, religious affiliation, gender, disability, sexual orientation, national origin. When awarding subcontracts, Proposer does not discriminate against any business certified under ORS 200.055 as a disadvantaged business enterprise, a minority-owned business, a woman-owned business, a business that a service-disabled veteran owns or an emerging small business. If applicable, Proposer has, or will have prior to contract execution, a written policy and practice, that meets the requirements described in ORS 279A.112 (formerly HB 3060), of preventing sexual harassment, sexual assault and discrimination against employees who are members of a protected class. Agency may not enter into a contract with an anticipated contract price of $150,000 or more with a Proposer that does not certify it has such a policy and practice. See https://www.oregon.gov/DAS/Procurement/Pages/hb3060.aspx for additional information and sample policy template.

7. Proposer complies with ORS 652.220 and does not unlawfully discriminate against any of Proposer's employees in the payment of wages or other compensation for work of comparable character on the

basis of an employee's membership in a protected class. "Protected class" means a group of persons distinguished by race, color, religion, sex, sexual orientation, national origin, marital status, veteran status, disability or age.

Contractor's continuing compliance constitutes a material element of this Contract/Price Agreement and a failure to comply constitutes a breach that entitles Agency to terminate this Contract/Price Agreement for cause.

Contractor may not prohibit any of Contractor's employees from discussing the employee's rate of wage, salary, benefits, or other compensation with another employee or another person. Contractor may not retaliate against an employee who discusses the employee's rate of wage, salary, benefits, or other compensation with another employee or another person.

**8.** Proposer is not engaged in the provision of broadband Internet access service, or if at any time Proposer is engaged in or may engage in the provision of broadband Internet access service Proposer is in compliance with Oregon Laws 2018, Chapter 88 (HB 4155) and applicable Public Utility Commission rules, and will remain in compliance throughout the term of the Contract.

**9.** Proposer and Proposer's employees, agents, and subcontractors are not included on:

**A.** the "Specially Designated Nationals and Blocked Persons" list maintained by the Office of Foreign Assets Control of the United States Department of the Treasury found at: https://www.treasury.gov/ofac/downloads/sdnlist.pdf., or

**B.** the government wide exclusions lists in the System for Award Management found at: https://www.sam.gov/

**10.** Proposer certifies that, to the best of its knowledge, there exists no actual or potential conflict between the business or economic interests of Proposer, its employees, or its agents, on the one hand, and the business or economic interests of the State, on the other hand, arising out of, or relating in any way to, the subject matter of the RFP. If any changes occur with respect to Proposer's status regarding conflict of interest, Proposer shall promptly notify the State in writing.

**11.** Proposer certifies that all contents of the Proposal (including any other forms or documentation, if required under this RFP) and this Proposal Certification Sheet are truthful and accurate and have been prepared independently from all other Proposers, and without collusion, fraud, or other dishonesty.

**12.** Proposer understands that any statement or representation it makes, in response to this RFP, if determined to be false or fraudulent, a misrepresentation, or inaccurate because of the omission of material information could result in a "claim" {as defined by the Oregon False Claims Act, ORS 180.750(1)}, made under Contract/Price Agreement being a "false claim" {ORS 180.750(2)} subject to the Oregon False Claims Act, ORS 180.750 to 180.785, and to any liabilities or penalties associated with the making of a false claim under that Act.

**13.** Proposer acknowledges these certifications are in addition to any certifications required in the Contract/Price Agreement and Statement of Work in Attachment A at the time of Contract/Price Agreement execution.

*[Additional Requirements for Contracts/Price Agreements using federal funds may be added here]*

4/30/26

Authorized Signature

Date

Dr. Carmen Phelps – CEO & Principal
Community Outreach Consultant

(Printed Name and Title)

# ATTACHMENT D - REFERENCE CHECK FORM

| | |
|---|---|
| Proposer Name: | __________ Project 986 Consulting LLC______________ |
| Reference Entity: | ___________ Island Healthcare_________________________ |
| Reference Contact Name: | ___________ Haley Dolan____________________________ |
| Contact Telephone Number: | ____________ 508-939-9358________________________ |
| Contact Email Address: | _____________hdolan@ihimv.org________ |

**Services are to have been provided by Proposer within the past 5 years.**

Please rate the following questions on a scale of 0-10:

0 = Not satisfied 5 = Moderately satisfied 10 = Extremely satisfied.

**1.** For what type of services did you engage Proposer?

Score: ___ 9_____

Comments: _ Community engagement, stakeholder outreach, surveys, focus groups, and strategic planning support focused on underserved populations.

**2.** How would you rate the Proposer's overall quality of services provided and your overall relationship with the Proposer?

Score: ___ 9_____

Comments: The team maintained a strong working relationship and provided high-quality engagement services that aligned with project goals.

**3.** How would you rate the Proposer's delivery of service?

Score: ___ 9_____

Comments: Deliverables were clear, organized, and completed in accordance with expectations.

**4.** How would you rate the Proposer's responsiveness to customer service issues and special requests (e.g., reported problems, changes billing, etc.)?

Score: ___ 10_____

Comments: The team was responsive and adaptable, addressing feedback quickly and effectively.

**5.** How well did Proposer stay within the proposed timeline?

Score: ____ 9______

Comments: Project milestones were met with only minor scheduling adjustments.

# ATTACHMENT D - REFERENCE CHECK FORM

| | |
|---|---|
| Proposer Name: | ____________ Project 986 Consulting LLC_______________ |
| Reference Entity: | _________ Washington State Housing Finance Commission_ |
| Reference Contact Name: | ___________ Bob Peterson_________________________ |
| Contact Telephone Number: | ____________ 206-287-4454_________________________ |
| Contact Email Address: | ___________Bob.Peterson@wshfc.com______________ |

**Services are to have been provided by Proposer within the past 5 years.**

Please rate the following questions on a scale of 0-10:

0 = Not satisfied 5 = Moderately satisfied 10 = Extremely satisfied.

1. For what type of services did you engage Proposer?

   Score: ___ 9_____

   Comments: Public outreach, stakeholder engagement, and strategic planning support related to affordable housing initiatives.

2. How would you rate the Proposer's overall quality of services provided and your overall relationship with the Proposer?

   Score: __ 9_____

   Comments: Project 986 provided thoughtful engagement strategies and maintained a professional working relationship.

3. How would you rate the Proposer's delivery of service?

   Score: ___ 9_____

   Comments: Services were delivered effectively and supported project objectives.

4. How would you rate the Proposer's responsiveness to customer service issues and special requests (e.g., reported problems, changes billing, etc.)?

   Score: __ 9_____

   Comments: The team remained responsive and addressed requests in a timely manner.

5. How well did Proposer stay within the proposed timeline?

Score: ___ 9______

Comments: Work was completed within expected timelines with minimal delays.

# ATTACHMENT D - REFERENCE CHECK FORM

Proposer Name: ____________ Project 986 Consulting LLC__________

Reference Entity: _________ NAACP – City of Cleveland_________

Reference Contact Name: ___________ Crystal Bryant________________________

Contact Telephone Number: _________ 216-250-1182__________________________

Contact Email Address: ___________cbryant@clevelandnaacp.org________________

**Services are to have been provided by Proposer within the past 5 years.**

Please rate the following questions on a scale of 0-10:

0 = Not satisfied 5 = Moderately satisfied 10 = Extremely satisfied.

1. For what type of services did you engage Proposer?

   Score: __ 9____

   Comments: Community outreach, stakeholder engagement, surveys, and facilitated dialogue sessions.

2. How would you rate the Proposer's overall quality of services provided and your overall relationship with the Proposer?

   Score: __ 9____

   Comments: The firm demonstrated strong engagement practices and maintained a collaborative relationship.

3. How would you rate the Proposer's delivery of service?

   Score: __ 9____

   Comments: Outreach activities were effectively conducted and supported planning efforts.

4. How would you rate the Proposer's responsiveness to customer service issues and special requests (e.g., reported problems, changes billing, etc.)?

   Score: __ 9____

   Comments: Feedback was addressed promptly and adjustments were made as needed.

5. How well did Proposer stay within the proposed timeline?

Score: ___ 8_____

Comments: Timeline was generally maintained with minor adjustments during engagement phases.

# ATTACHMENT D - REFERENCE CHECK FORM

Proposer Name: ______________ Project 986 Consulting LLC__________

Reference Entity: ____________ Riverside Community Care_______________

Reference Contact Name: _____________ Deepti Kumra_______________________

Contact Telephone Number: ____________ 781-915-7557________________________

Contact Email Address: _____________ dkumra@riversidecc.org_____________

**Services are to have been provided by Proposer within the past 5 years.**

Please rate the following questions on a scale of 0-10:

0 = Not satisfied 5 = Moderately satisfied 10 = Extremely satisfied.

**1.** For what type of services did you engage Proposer?

Score: ____ 9____

Comments: Community engagement, interviews, focus groups, and outreach strategy development.

**2.** How would you rate the Proposer's overall quality of services provided and your overall relationship with the Proposer?

Score: __ 9_____

Comments: Project 986 delivered consistent engagement support and maintained a strong working relationship.

**3.** How would you rate the Proposer's delivery of service?

Score: __8_____

Comments: Services were delivered effectively and aligned with project needs.

**4.** How would you rate the Proposer's responsiveness to customer service issues and special requests (e.g., reported problems, changes billing, etc.)?

Score: __ 9_____

Comments: They were responsive and demonstrated flexibility in addressing requests.

**5.** How well did Proposer stay within the proposed timeline?

Score: ___ 9____

Comments: Met expected timelines.

# ATTACHMENT D - REFERENCE CHECK FORM

Proposer Name: __________ Project 986 Consulting LLC_____________

Reference Entity: ___________ Lake Champlain Basin Region_________________

Reference Contact Name: ____________ Mae Kate Campbell__________________________

Contact Telephone Number: _____________ 802-372-3213________________________

Contact Email Address: ______________mkcampbell@lcbp.org______________

**Services are to have been provided by Proposer within the past 5 years.**

Please rate the following questions on a scale of 0-10:

0 = Not satisfied 5 = Moderately satisfied 10 = Extremely satisfied.

**1.** For what type of services did you engage Proposer?

Score: ____ 9_____

Comments: Multi-state community engagement, stakeholder outreach, and strategic planning support.

**2.** How would you rate the Proposer's overall quality of services provided and your overall relationship with the Proposer?

Score: ____ 9_____

Comments: Project 986 demonstrated strong coordination and maintained effective communication across stakeholders.

**3.** How would you rate the Proposer's delivery of service?

Score: ___10______

Comments: Deliverables were well organized and met project requirements.

**4.** How would you rate the Proposer's responsiveness to customer service issues and special requests (e.g., reported problems, changes billing, etc.)?

Score: ____ 9_____

Comments: Requests were handled appropriately with timely follow-up

**5.** How well did Proposer stay within the proposed timeline?

Score: _____10_____

Comments: Project timelines were maintained throughout the engagement.

# ATTACHMENT F –CERTIFIED DISADVANTAGED BUSINESS OUTREACH PLAN

**Proposer Name:** Dr. Carmen Phelps dba Project 986 Consulting **Date:** 4/30/26

**Contact Name:** Dr. Carmen Phelps **Telephone:** 202-489-4240 **Email:** cphelps@project986consulting.com

"Certified Firm" means a small business certified under ORS 200.055 by the Oregon Certification Office for Business Inclusion and Diversity (COBID) as minority-owned businesses, woman-owned businesses, businesses that service-disabled veterans own, and emerging small businesses.

Certified Firms must have an equal opportunity to participate in the performance of contracts financed with state funds. By submitting its offer, Proposer certifies that it has taken, and if there are further opportunities, will take reasonable steps to ensure that Certified Firms are provided an equal opportunity to compete for and participate in the performance of any subcontracts resulting from this procurement.

The information submitted in response to this clause will not be considered in any scored evaluation.

**1. Is Proposer an Oregon certified firm?** Yes ☐ No **X** (we are certified WBE/MBE/SBA in MD)

If yes, indicate all certification type(s): DBE ☐ MBE ☐ WBE ☐ SDV ☐ ESB ☐ and supply

Oregon State Certification Number: ______________________

**2. Include a list of Certified Firms that Proposer has had a contractual relationship with within the last two years.**

Project 986 Consulting, LLC has not had contractual relationships with Oregon-certified firms within the last two years. We are a well-functioning and fully staffed organization with the internal capacity to perform all required services by ourselves.

**3. Include a list of firms that Proposer has had a contractual relationship with within the last two years that are not Certified Firms but may be minority-owned, woman-owned, service-disabled veteran-owned or emerging small businesses.**

Project 986 Consulting, LLC is a Minority-Owned and Women-Owned Small Business and has performed its contracts independently. The firm has not engaged additional firms under subcontracting arrangements within the last two years.

**4. Does Proposer foresee any subcontracting opportunities for this procurement?** Yes **X** / No ☐

If no, do not complete the rest of this form and submit this first page with your Proposal.

If yes, please complete the following pages and submit all pages with your Proposal.

# CERTIFIED DISADVANTAGED BUSINESS OUTREACH PLAN

**5. Describe the steps Proposer will take to solicit Certified Firms for subcontracting opportunities if awarded a contract from this procurement.**

We will solicit support from certified subcontractors via social media platforms and existing network of currently certified firms with whom we have partnered in the past.

**6. Describe the subcontracting opportunities and the approximate dollar value of each that may be available, if awarded a Contract.**

Subcontracting support may be solicited to support data-gathering processes as detailed in our technical proposal. Approximate dollar amount for this service: $15,000

**7. Would Proposer be willing to report the identity of each subcontractor and the value of each subcontract to COBID if awarded a Contract from this procurement?**

Yes

# ATTACHMENT G - RESPONSIBILITY INQUIRY

Agency will determine responsibility of a Proposer prior to award and execution of a Contract/Price Agreement. In addition to this form, Agency may notify Proposer of other documentation required, which may include but is not limited to recent profit-and-loss history, current balance statements and cash flow information, assets-to-liabilities ratio, including number and amount of secured versus unsecured creditor claims, availability of short and long-term financing, bonding capacity, insurability, credit information, materials and equipment, facility capabilities, personnel information, record of performance under previous contracts, etc. Failure to promptly provide requested information or clearly demonstrate responsibility may result in an Agency finding of non-responsibility and rejection.

**1.** Does Proposer have available the appropriate financial, material, equipment, facility and personnel resources and expertise, or ability to obtain the resources and expertise, necessary to demonstrate the capability of Proposer to meet all contractual responsibilities? **YES X / NO ☐.**

**2.** Within the last five years, how many contracts of a similar nature has Proposer completed that, to the extent that the costs associated with and time available to perform the contract remained within Proposer's control, Proposer stayed within the time and budget allotted, and there were no contract claims by any party? Number: __6__

How many contracts did not meet those standards? Number: __0__ If any, please explain.

| Response: |
|---|

**3.** Within the last three years has Proposer (incl. a partner or shareholder owning 10% or more of Proposer's firm) or a major subcontractor (receiving 10% or more of a total contract amount) been criminally or civilly charged, indicted or convicted in connection with:

- obtaining, attempting to obtain, or performing a public (Federal, state, or local) contract or subcontract,
- violation of federal or state antitrust statutes relating to the submission of bids or Proposals, or
- embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, tax evasion, or receiving stolen property? **YES ☐ / NO X.**

If "YES," indicate the jurisdiction, date of indictment, charge or judgment, and names and summary of charges in the response field below.

| Response: |
|---|

**4.** Within the last three years, has Proposer had:

- any contracts terminated for default by any government agency, or
- any lawsuits filed against it by creditors or involving contract disputes? **YES ☐ / NO X.**

If "YES," please explain. (With regard to judgments, include jurisdiction and date of final judgment or dismissal.)

| Response: |
|---|

**5.** Does Proposer have any outstanding or pending judgments against it? **YES ☐ / NO X.**

Is Proposer experiencing financial distress or having difficulty securing financing? **YES ☐ / NO X.**

Does Proposer have sufficient cash flow to fund day-to-day operations throughout the proposed contract period? **YES X / NO ☐**

If "YES" on the first question or second question, or "NO" on the third question, please provide additional details.

| Response: |
|---|

**6.** Within the last three years, has Proposer filed a bankruptcy action, filed for reorganization, made a general assignment of assets for the benefit of creditors, or had an action for insolvency instituted against it? **YES ☐ / NO X.**

If "YES," indicate the filing dates, jurisdictions, type of action, ultimate resolution, and dates of judgment or dismissal, if applicable.

| Response: |
|---|

**7.** Does Proposer have all required licenses, insurance and/or registrations, if any, and is Proposer legally authorized to do business in the State of Oregon? **YES X /NO ☐.**

If "NO," please explain.

| Response: |
|---|

**8.** Pay Equity Certificate. This certificate is required if Proposer employs 50 or more full-time workers and the prospective contract price is estimated to exceed $500,000. [This requirement does not apply to architectural, engineering, photogrammetric mapping, transportation planning or land surveying and related services contracts.] Does a current authorized representative of Proposer possess an unexpired Pay Equity Certificate issued by the Department of Administrative Services? **YES ☐ / NO ☐ / N/A X☐.** [If the certificate was provided with the Bid or Proposal submitted for a solicitation related to the prospective contract, then it is not necessary to resubmit it. Just indicate "see Bid" or "see Proposal" in the response field. **Otherwise, if applicable, submit a copy of the certificate with this form.**]

| Response: |
|---|

**AUTHORIZED SIGNATURE**

By signature below, the undersigned Authorized Representative on behalf of Proposer certifies to the best of his or her knowledge and belief that the responses provided on this form are complete, accurate, and not misleading.

| Proposer Name:<br><br>Dr. Carmen Phelps dba Project 986 Consulting | RFP: S-15000-00014978<br><br>Project Name: HB 3506 Community Engagement And Outreach Services |
|---|---|

______________________________4/30/26____________
Authorized Signature Date

Dr. Carmen Phelps__________ Principal Community Outreach Consultant___
Print Name Title

# DOR Vendor Accessibility Questionnaire

This questionnaire is intended to help DOR evaluate the accessibility of vendor products and services during procurement. Vendors should answer all questions as accurately and completely as possible and may attach additional documentation where needed.

**Vendor and Product Information**

Vendor Name: Project 986 Consulting LLC

Product Name: Community Engagement, Outreach, and Public Awareness Campaign Services

Product Version: Not Applicable (Service-Based Offering)

Vendor Contact Name: Dr. Carmen Phelps

Vendor Contact Title: CEO, Founder and Lead Consultant

Vendor Contact Email: cphelps@project986consulting.com

Date Submitted: May 1, 2026

### Accessibility Conformance

1. Does the product conform to Web Content Accessibility Guidelines (WCAG) 2.1 Level AA? Please describe the level of conformance and any known limitations.

Project 986's services are designed to conform to WCAG 2.1 Level AA standards. All outreach materials and communications are developed using plain language, structured formatting, appropriate color contrast, and compatibility with assistive technologies. Known limitations may include reliance on third-party platforms (e.g., social media or media vendors) where accessibility features are outside direct control; however, efforts are made to select accessible tools and provide alternative formats where needed.

2. Do you provide an Accessibility Conformance Report (ACR) or Voluntary Product Accessibility Template (VPAT)? If yes, please attach the most recent version and indicate the report date.

Yes. An Accessibility Conformance Report (ACR) based on VPAT® Version 2.5Rev (WCAG Edition) is provided below:
Report Date: May 1, 2026. The most recent version is attached below:

# Project 986 Consulting LLC Accessibility Conformance Report

## WCAG Edition (Based on VPAT® Version 2.5Rev)

Name of Product/Version: Community Engagement, Outreach, and Public Awareness Campaign Services
Report Date: May 1, 2026
Product Description: Service-based outreach, communications, and engagement activities including print/digital materials and public education aligned with accessibility standards.
Contact Information: Project 986 Consulting LLC
Notes: This report applies to service-based deliverables (not a standalone software product). Accessibility is addressed through design, content, and delivery methods aligned with WCAG 2.1 Level AA and ADA Title II.

### Evaluation Methods Used:

Manual review of materials; WCAG 2.1 Level A & AA checks; plain language/readability review; assessment of compatibility with assistive technologies; review of multilingual and non-digital access needs.

### Applicable Standards/Guidelines:

| Standard/Guideline | Included In Report |
|---|---|
| WCAG 2.0 | Level A (Yes), Level AA (Yes), Level AAA (No) |
| WCAG 2.1 | Level A (Yes), Level AA (Yes), Level AAA (No) |
| WCAG 2.2 | Level A (No), Level AA (No), Level AAA (No) |

### Terms:

Supports: Meets the criterion. Partially Supports: Some aspects do not meet. Does Not Support: Does not meet. Not Applicable: Not relevant. Not Evaluated: Not assessed.

### Table 1: Success Criteria – Level A

| Criteria | Conformance | Remarks |
|---|---|---|
| 1.1.1 Non-text Content | Supports | Alt text provided |
| 1.3.1 Info and Relationships | Supports | Structured layouts |
| 1.4.1 Use of Color | Supports | Color not sole method |
| 2.1.1 Keyboard | Supports | Keyboard accessible |
| 2.3.1 Three Flashes | Supports | No harmful flashing |
| 3.1.1 Language of Page | Supports | Language defined |
| 3.3.2 Labels/Instructions | Supports | Clear instructions |
| 4.1.2 Name, Role, Value | Supports | Assistive tech compatible |

### Table 2: Success Criteria – Level AA

| Criteria | Conformance | Remarks |
|---|---|---|
| 1.4.3 Contrast | Supports | High contrast used |
| 1.4.4 Resize Text | Supports | Readable when resized |
| 1.4.10 Reflow | Supports | Responsive layout |
| 2.4.5 Multiple Ways | Supports | Multiple formats |
| 2.4.6 Headings/Labels | Supports | Clear structure |
| 3.1.2 Language of Parts | Supports | Multilingual support |
| 3.2.3 Consistent Navigation | Supports | Consistent layout |

| | | |
|---|---|---|
| 4.1.3 Status Messages | Supports | Clear communication |

Table 3: Success Criteria – Level AAA

| Criteria | Conformance | Remarks |
|---|---|---|
| All Level AAA Criteria | Not Evaluated | Not required under this RFP |

Legal Disclaimer: This report reflects accessibility conformance based on WCAG 2.1 Level AA. Third-party platform accessibility may vary.

3. What version of the product was evaluated for accessibility testing?

Not Applicable (Service-based evaluation covering outreach materials, communications, and engagement activities rather than a fixed software version).

4. When was the most recent accessibility evaluation performed?

The most recent accessibility evaluation was performed as part of proposal development in April-May 2026.

### Accessibility Testing Methods

5. What accessibility testing methods are used? (e.g., automated tools, manual testing, assistive technology testing)

Accessibility testing methods include manual review of materials, WCAG 2.1 Level A and AA conformance checks, plain language and readability review, and evaluation of compatibility with assistive technologies.

6. What tools or technologies are used to perform accessibility testing?

Testing methods rely on manual review practices, WCAG conformance checklists, and accessibility best practices. Where applicable, compatibility considerations include screen readers and assistive technologies.

7. How often is accessibility testing performed? (e.g., each release, quarterly, annually)

Accessibility review is performed during content development and prior to release of materials, and continuously throughout the project lifecycle.

8. Do you conduct usability testing with individuals who use assistive technologies? If yes, please describe.

Direct usability testing with assistive technology users is not conducted as part of standard service delivery; however, feedback from community partners and target populations is incorporated to improve accessibility and usability.

### Accessibility Governance

9. Does your organization maintain a documented accessibility policy or accessibility program? If yes, please provide a summary or attach documentation.

Yes. Project 986 follows an internal accessibility approach aligned with WCAG 2.1 Level AA and ADA Title II requirements. This includes plain language standards, inclusive communication practices, and accessibility review as part of all deliverables.

10. Do you have staff dedicated to accessibility (e.g., accessibility specialists or engineers)? Please describe.

Accessibility responsibilities are integrated into project roles, with the Program Manager and team members responsible for ensuring accessibility compliance across all deliverables.

11. How are accessibility issues tracked and managed (e.g., issue tracking systems, accessibility backlog)?

Accessibility issues are tracked through internal review processes and addressed during content development and revision cycles to ensure compliance prior to delivery.

### Accessibility Remediation and Maintenance

12. If accessibility issues are identified, what remediation timelines are typically planned?

Accessibility issues are addressed as soon as identified, typically during the same development cycle prior to release of materials.

13. How are accessibility issues prioritized and addressed within your development lifecycle?

Accessibility issues are prioritized as a core requirement and addressed alongside content development to ensure compliance before dissemination.

14. How do you ensure updates, patches, or new releases do not introduce accessibility regressions?

Accessibility is reviewed at each stage of development and prior to release to ensure that updates or revisions do not introduce accessibility barriers.

15. If accessibility barriers cannot be immediately resolved, what interim accommodations or alternative access methods are provided?

If accessibility barriers cannot be immediately resolved, alternative formats (e.g., simplified text, alternative document formats, or direct assistance) are provided to ensure access.

### Accessibility Documentation and Support

16. Do you provide documentation or guidance to help customers configure or use the product in an accessible manner?

Yes. Guidance is provided through clear, plain language materials and accessible communication formats to support understanding and use by diverse audiences.

17. Are accessibility-related support requests tracked and prioritized? Please describe your support process.

Accessibility-related concerns are addressed through ongoing communication and project coordination. Feedback is reviewed and incorporated into updates to improve accessibility and usability.

Additional Comments or Documentation:

Project 986's accessibility approach is integrated into all outreach, communication, and engagement activities. Accessibility is treated as a core requirement to ensure that seniors, individuals with disabilities, and underserved populations can effectively access and understand program information.