

**Washington State
Department of Transportation**

Request For Qualifications

**Toll Division Educational Marketing
and Advertising Services**

Packet A



SHERRY MATTHEWS GROUP



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SCORING CRITERIA 1: QUALIFICATIONS/EXPERTISE OF FIRMS ON TEAM

1.A. Listing of firms, types of experience, length of service, and organizational chart

1.A.1. Listing of Firms: Sherry Matthews, Inc. dba Sherry Matthews Group, Larson Consulting Associates (LCA), Lund Faucett

1.A.2. Types of Experience:

SHERRY MATTHEWS GROUP offers the ideal combination of full-service capability and flexibility. We're big enough to provide experienced staff across a spectrum of services and small enough to be personalized, nimble, and cost-effective. We have the proven experience to successfully meet the service requirements of the Toll Marketing and Advertising Services Statement of Work, from developing the project work plan to executing creative, paid media, public relations, and research strategies. Our capabilities and services include the following.

Strategic planning/account management. A dedicated, knowledgeable account team manages each contracted engagement to provide targeted expertise and consistency. Every member of our account service group has been handpicked for his or her achievements in government- and transportation-related marketing. All share a deep commitment to excellence in collaborative client service, strategic planning, and project stewardship and oversight.

Branding. We help clients harness the laws of branding to stand out, build relationships, win loyalty, and inspire action. With a unique and disciplined process based on extensive experience in consumer marketing, public affairs, and public education campaigns, we create brand-driven communications programs that speak to the heart and the mind. Specific services include internal and external audience research, communication audits, brand strategy and positioning, logos/visual identity/tagline development, and brand standards manuals. For the I-405 Express Toll Lanes, we developed a new sub-brand for the Flex Pass, which was integrated into the *Good To Go!* toll pass family of products.

Research that generates results. Successful communications start with strategy. And strategy starts with existing data and new research. Through the use of sound research techniques to guide and test the effectiveness of our messaging, creative, and tactics, we discover often-nuanced insights that are actionable and can change behaviors.

Award-winning creative. Since our agency first opened its doors exceptional creative has been our calling card, and we have won hundreds of national and international awards for our creative work, competing against some of the largest advertising agencies in the world. Headed by longtime advertising and design creative directors who deeply understand marketing strategy, our in-house creative team includes art directors, graphic designers, digital/interactive strategists and producers, web developers, copywriters, illustrators, animators, audio/visual producers, and production and traffic managers.

Media planning/buying. Our media planners and buyers find the sweet spot in the advertising mix, using traditional, online, and mobile media channels to stretch budgets, optimize buys, and place messages where they are sure to be seen and heard by target audiences. Our team members are tough negotiators working on behalf of our government and nonprofit clients to be good stewards of toll dollars. In addition to locking in the best rates, they deliver millions of dollars in added value every year for our clients.



Public relations. We develop in-depth campaign media kits and provide planning and turnkey execution of campaign launches, press conferences, and other special events for which we produce imaginative visuals and props ready-made for prime time. Because hiring a marketing partner should decrease your workload and stress, we handle all event logistics. We're persistent in our efforts to garner positive media coverage for our clients' campaigns and extend the value of marketing budgets through earned media.

Multicultural marketing. We create campaigns that are culturally appropriate for diverse audiences. Although we have our own Spanish-speaking strategist, we know successful marketing for Washington State's diverse populations requires more than in-house language proficiency. For the SR 99 Tunnel tolling program we translated materials into eight languages, and when WSDOT did not have a person within their organization from Somalia to review and approve those materials, we reached out to and paid (through a donation) a local nonprofit that worked with Somalian refugees to review the materials for accuracy and cultural appropriateness. We also partnered with the Seattle Office of Immigrant and Refugee Affairs to identify special publications and websites that reach underserved communities to place paid advertising, both reaching those communities and supporting the businesses that inform them. These are just a few examples of ways we have ensured our messages are being seen and heard by the communities that need them most.

Websites/interactive. We provide websites and web-based interactive solutions that enable clients to be successful in the digital sphere. These include website design, development, and maintenance; content development and strategy; information architecture; user experience testing; email management; accessibility compliance; web-based tools; interactive marketing; search engine optimization and marketing; and eLearning.

Social media. Our social media strategies are designed for a client's needs, budget, and policies. They can be as simple as partnering with influencers to tweet/post on behalf of a campaign or as involved as a fully managed and curated Facebook or Instagram community. Our goal is to create content that engages the audience, builds online communities, and encourages users to share, comment, like, and act.

Outreach/partnerships. We have an impressive record in this area, reaching audiences where they live, work, and play. Through outreach, we have raised awareness of transportation issues, built coalitions, and mobilized communities. Our team has established relationships with media vendors, businesses, state agencies, and dozens of organizations to help deliver messages, provide in-kind support, and underwrite campaign costs.

Because most of our clients are government agencies, we understand the demand for accountability and transparency and the imperative to provide services in ways that deliver the best use of public funds. Likewise, the experience of our sub-consultants also demonstrate their history of working with government clients as noted below.

LARSON CONSULTING ASSOCIATES (LCA), established in 2015 in Washington State, is a Washington State certified Disadvantaged Business Enterprise. We are a unique firm that has deep and varied experience in the toll industry. We have more than 40 combined years of experience in communications strategy, public, government, and media relations, marketing, public involvement, customer outreach, retail programs, and market research including survey development. LCA has worked on nearly every aspect of tolling ranging from marketing and communications to toll rate setting to toll operations. This gives us a keen appreciation of the



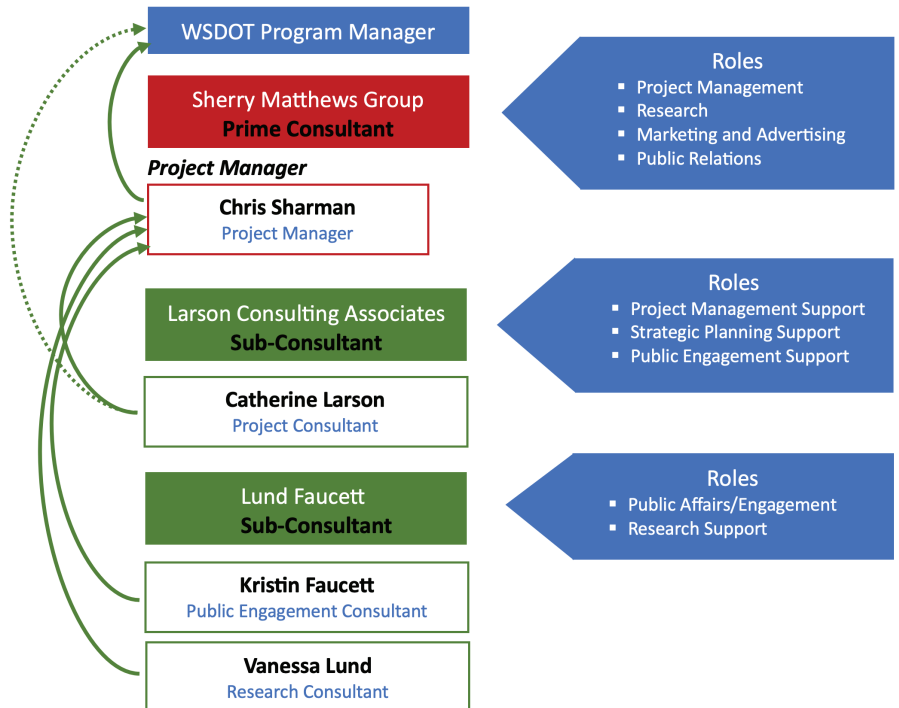
intersection between toll facility launches, educational marketing, and the customer experience. Finally, we have a long and successful history supporting WSDOT Toll Division that stretches back to the preparation of SR 520 tolling. We know the history of the *Good To Go!* brand and the facilities it represents, the hard work establishing it, the WSDOT communication style and its high standards for public transparency. We have handled media for the WSDOT Toll Division and prepared staff for media interviews. We have developed tabletops in preparation for go-lives. In summary, LCA doesn't just have communications and marketing experience, we have extensive WSDOT Toll Division communication and marketing experience.

LUND FAUCETT is an integrated public affairs and research consulting firm that develops and executes data-driven communications and outreach in the Pacific Northwest. We deliver deep insights, bold ideas, and strategic engagement around high-profile, complex policy issues. We advise clients on strategies to achieve their organizational, business, regulatory, and/or legislative goals. We facilitate and manage leadership groups and committees, analyze data and policy issues, conduct research, develop and implement communications plans, produce supporting materials, and provide a variety of professional communications services. We're particularly good at making complicated and technical information understandable for key audiences. Lund Faucett's public policy expertise combined with our in-house research and communications capabilities result in scientifically sound insights that help clients achieve their desired goals. Our principals, Kris Faucett and Vanessa Lund, worked on the I-405 project with Sherry Matthews Group as part of Cocker Fennessy.

1.A.3. Length of Experience

- Sherry Matthews Group (40 years)
- LCA (8 years)
- Lund Faucett (6 years)

1.A.4. Organizational Chart





1.B. Provide listing of each team member's offices within the state of Washington (including the Greater Portland Metropolitan Area), include the total number of employees within each location and the types of expertise that is available at each location.

Firm	Location	Employees	Expertise
LCA	Tacoma/Seattle, WA	4	Public involvement; media relations; project management; research; writing; transponder marketing and distribution; communication, strategy, media and event plans
Lund Faucett, LLC	Seattle, WA	4	Public opinion research, strategic communications planning, public and stakeholder engagement

1.C. Prime Consultant Work History with Sub-consultant

LCA and Sherry Matthews Group have a working relationship of nearly 20 years and most recently collaborated on Riverside County (CA) Transportation Commission's (RCTC) 15 Express Lane and 91 Express Lane Projects in 2021. LCA was responsible for the coordination of the transponder replacement program for the 91 Express Lane transition from the legacy Title 21 transponder protocol to a new 6C transponder protocol. As part of that effort LCA collaborated with Sherry Matthews Group, who developed website design, collateral materials, and transponder packaging. For the 15 Express Lanes LCA worked with Sherry Matthews Group on brand development for RCTC's Riverside Express Program and all marketing and communications elements that launched the 15 Express Lanes in 2021. Our partnership with Sherry Matthews Group is so seamless and successful that we have tapped into their specific expertise, such as research, on short term projects for other agencies.

Lund Faucett worked with Sherry Matthews Group on I-405; however, it was more than three years ago.

1.D. Key Staff Resources

Key Staff	Hours Available Per Month
Chris Sharman, Project Manager	40-60 hours on average, but can scale up or down depending on project needs.
Julie Pippin, Account Supervisor	60-80 hours on average, but can scale up or down depending on project needs.
José Marrero, Lead Strategist/Multicultural Marketing Director	20
Charles Webre, Executive Creative Director	20
Karen Purcell, Media Director	20
Colin Gilligan, Digital Strategy and Development Director	20
Klaudia Marino, Research Director	20



Robert Nash, Public Relations Director	20–40 hours on average, but can scale up or down depending on project needs
Wardaleen Belvin, Chief Financial Officer	8
Vanessa Lund, Research Manager	20
Kristin Faucett, Public Involvement Manager	20
Catherine Larson, Strategist/Business Consultant	24

1.E. Demonstration of Required Expertise (three projects for each firm on team)

SHERRY MATTHEWS GROUP PROJECTS

1. TEXAS SPECIAL SUPPLEMENTAL NUTRITION PROGRAM FOR WOMEN, INFANTS, AND CHILDREN (WIC)

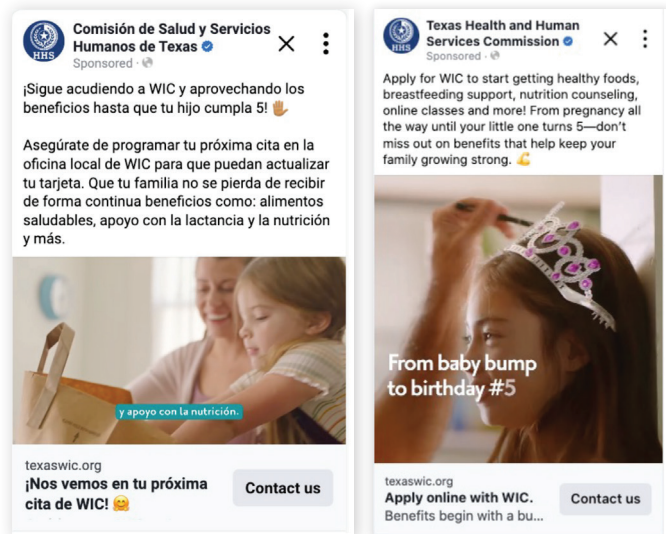
- Budget:** \$3.7 million (FY 22), \$2.75 million (FY 23)
- Duration:** 2015–Present
- Success Metric:** Increase enrollment and retention

We are currently managing a campaign to increase enrollment and retention while building awareness. We manage strategic planning, digital and traditional media placement, research and creative development in addition to website development for TexasWIC.org and the learning management system (LMS)—[TexasWIC.org/online-classes](https://www.texaswic.org/online-classes).

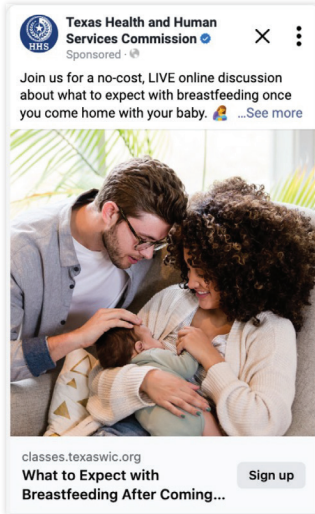
Many states have seen a decline in enrollment in recent years and our client feared the same trend would hold true for Texas. While our goal was to increase enrollment, our client would have been happy just maintaining current levels. We worked with Texas WIC to quickly shift and change messaging on our digital media platforms to make it more relevant during and post-COVID. Due to our proactive approach, Texas WIC has seen an increase in applications for 11 out of the last 12 months, and year-over-year increases in enrolled clients for the past two years.

Management and Strategic Planning

Our strategic approach to WIC is straightforward: listen carefully, research thoroughly, and give WIC the benefit of our experience. Strategic planning is fueled by qualitative research, and this analysis deepens our understanding of what messages work best in creative development. Research and past experience provide a keen understanding of the vehicles that best carry these messages, from digital media focused on driving potential clients to start their application online to awareness channels such as out-of-home, OTT (TV streaming), or earned media that increase the likelihood that ads in the digital environment are recognized and associated positively by a broader audience.



Prospective Clients Facebook ad – acquisition



Live Class ad

Research and Evaluation

To test advertising concepts and website usability, Sherry Matthews Group conducted extensive focus groups, in-depth interviews (IDI), and user experience (UX) research to gain insights from the new generation of WIC-eligible moms. Formative research identified that the useful, authentic support provided by WIC matters most to the primary target audience. Recent IDIs further revealed key knowledge gaps that, when addressed in communications, help drive moms to apply for WIC.

We learned that many moms are unaware that WIC benefits begin the moment a woman finds out she's pregnant. Also, making sure their children have the best healthy start in life, and seeking expert nutrition information and breastfeeding support to do so, are activities most moms find important. We found that despite being savvy in these areas, many did not know that WIC provides free one-on-one consultation with nutritionists, IBCLCs (International Board Certified Lactation Consultants), and peer counselors to help breastfeeding moms along with new organic options available in monthly food packages. Our awareness campaigns drive applications by highlighting these knowledge gaps and showing how WIC can help empower new and expecting mothers.

Public Relations, Outreach, Partnerships, and Engagement

We believe the channels for delivering a campaign message are as important as the message itself and providing local WIC agencies and clinics with tools to reach an even larger audience is critical. We have managed events statewide and partnered with WIC to develop a set of event activation materials ranging from booth signage and handouts to activities for young children; developed lesson plans for engaging family activities at the clinics and handouts for families to continue healthy behaviors at home; designed and produced nutrition education incentives to encourage re-enrollment; developed an interactive training program with handouts for local agencies to conduct information sessions with healthcare providers to right misconceptions and encourage them to refer patients to WIC; and conducted and developed Masterclass sessions for local WIC agencies covering social media channels and setup, content strategy and creation, and ways to manage online communities. These sessions are coupled with a toolkit containing creative resources, templates, and a social media comment response decision tree.

We have also developed public relations materials (talking points, key messages, press release templates) and conducted media training to proactively reposition WIC as experts in infant feeding and nutrition, and through media training are working to empower local agencies to carry these messages in their markets.

Paid Media

Our paid digital media team has identified awareness and acquisition objectives as important to increasing enrollment and retention and has developed strategies and tactics to meet those objectives. We use an evolving digital media campaign that allows us to reach moms on the devices they use every day, is responsive to the capacity and needs of local agencies, and optimizes to the platforms, ad types, and creative units best suited to deliver the most cost-effective approach. In an ever-changing digital media environment, tracking and being responsive to the ways we can improve a digital media campaign is at the core of the campaign's digital media approach. Understanding the interplay between awareness and acquisition objectives is key to both increasing participation rates and repositioning WIC as a public health program. Digital



media ranges from static to video, including over-the-top (OTT/TV streaming), and also includes influencer content development. We supplement digital with neighborhood billboards.

Website and Technology

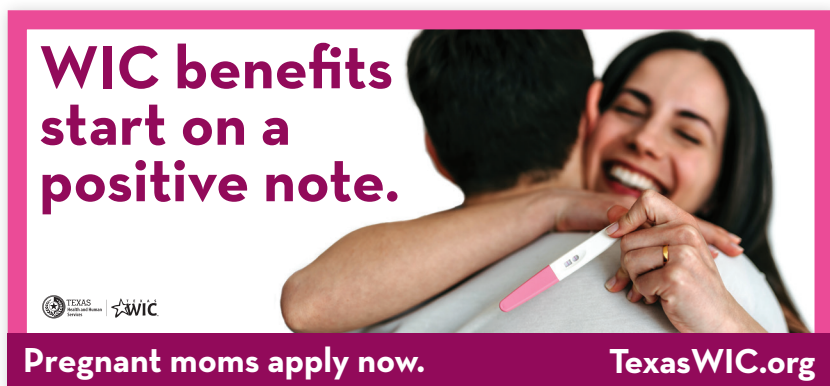
We developed [TexasWIC.org](https://www.texaswic.org) on the Drupal CMS platform with the assistance of user testing for a better user experience to drive acquisition. TexasWIC.org strives to make the start-up application process easier and faster. The site is fully responsive and WCAG 2.0 AA compliant. The site includes:

- An online start-up application form using Qualtrics.
- Maya, the Texas WIC chatbot, who provides answers to questions about WIC and helps moms and families apply.
- A searchable database of healthy recipes by category, dietary needs, and WIC food count for the website.
- A special section for kids on the new TexasWIC.org with animated storytelling, music, and more.
- More than three dozen online or live classes that demonstrate ways to incorporate daily nutrition, provide help with breastfeeding, and offer recommendations to help families implement healthy behaviors for their families.
- Registration to sign up for live online classes hosted on the Livestorm platform.
- Detailed reports on class participation with the integrated Learning Records Store (LRS) that was customized for WIC's specific needs.
- Cloudflare, which is used to manage high traffic volumes that may result from a massive text notification to all WIC moms and to help safeguard the website from attack.
- Registration for the "[Real Tips for Real Life](#)" newsletter that features advice for moms of children ages 12 months to five years. The "[Belly to Baby](#)" newsletter is available through [BreastmilkCounts.com](https://www.breastmilkcounts.com), providing moms with advice and tips from conception to baby's first birthday.

RESULTS

WIC tracked an increase in participation rates 11 out of 12 months for FY22, showing a year-over-year increase in participation. Enrollment results exceeded client expectations.

- August 2022 was the highest monthly participation gain in any month since 2011.
- Digital media generated 634,782 acquisitions, compared to 300,814 acquisitions in FY21 (acquisition defined as started or completed application, or direct contact with WIC).
- The average cost per acquisition for FY22 was \$3.13. Compared to \$8.14 in FY21, this demonstrated that media was more effective at encouraging WIC clients to apply.
- FY22 generated more effective results while spending nearly \$500,000 less than FY21.



Billboard



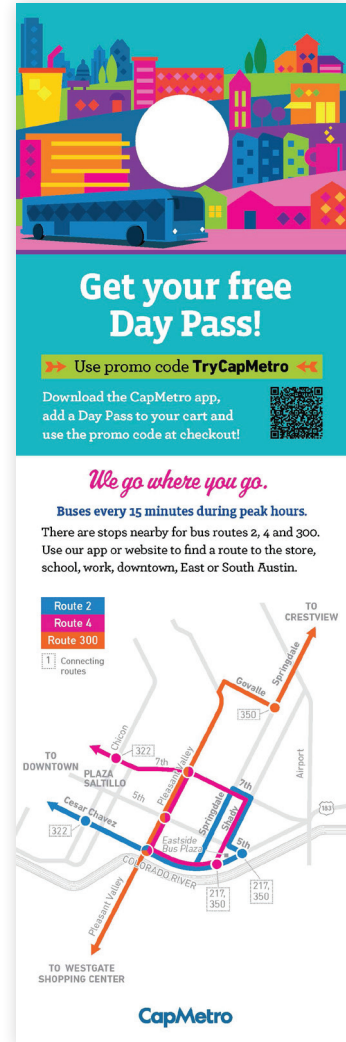
2. CAPMETRO (AUSTIN TRANSIT AUTHORITY) 2023 FALL RIDERSHIP CAMPAIGN

- Budget:** \$426,371 (Fall Ridership task order only)
- Duration:** October - December 2023
- Success Metric:** Increase overall system ridership by 10% over the previous year.

CapMetro has been a Sherry Matthews Group client since 2002, and annual budgets range between \$500,000-\$3 million across task orders each fiscal year. For the Fall Ridership campaign CapMetro asked us to focus on increasing ridership, which suffered during the pandemic in Austin as it did for transit agencies across the country. While CapMetro’s ridership has since increased, it has not returned to pre-pandemic levels despite the region’s population growth.

Several factors might explain this slow growth in ridership: increased teleworking, customer dissatisfaction with service levels, and riders’ lingering unease with tight, crowded spaces that was heightened during the pandemic. Despite these challenges, CapMetro asked Sherry Matthews Group to increase ridership 10% over the prior year.

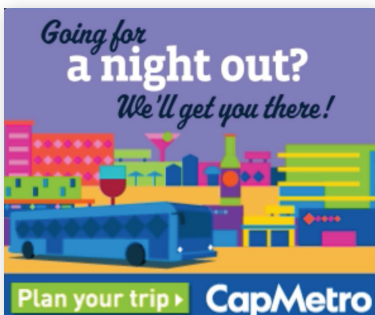
To accomplish the goal, we chose to focus on the routes that are the most direct, reliable, and high frequency. Using a combination of outdoor and digital strategies, we geo-targeted potential customers within close proximity to high frequency routes (HFRs). In addition to geo-targeting, we also used device ID tracking to identify potential customers whose travel patterns match at least two locations (origin/destination points) close to HFR stops, CapMetro Rail Red Line stops, and/or Park & Ride locations. These potential customers were served ads tailored to their travel patterns. Finally, we used transit ads, door hangers, and influencers to help raise general awareness of transit as a viable alternative to sitting in traffic.



Geo-targeted door hanger

RESULTS

- **11.8% increase** in ridership comparing campaign periods of September–November 2022 to September–November 2023.
- **19% increase** in ridership year-over-year comparison.



Geo-targeted banner ad



Newsprint ad



Mobile banner ad



3. TEXAS DEPARTMENT OF STATE HEALTH SERVICES (DSHS) COVID-19 CAMPAIGN

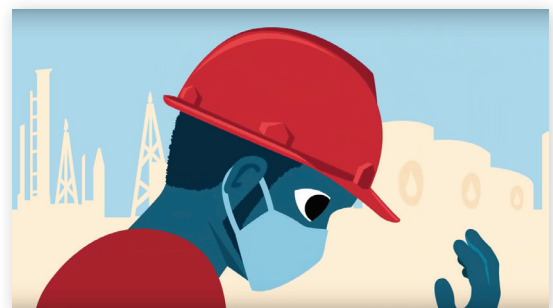
- Budget:** \$19.9 million (total for all three years)
Duration: 2020–2023
Success Metric: Increase vaccine awareness and rates.

In March 2020, Texas DSHS hired Sherry Matthews Group to begin developing a fast-track COVID-19 public awareness campaign. Within a few weeks, we had conducted market research; negotiated media buys; produced creative assets for television, radio, digital, and social media platforms; and launched the campaign during a town hall program that aired on news channels throughout the state. Initial messages emphasized staying home and following COVID safety behaviors. The ever-changing pandemic landscape necessitated devising new strategies and messages for numerous phases. As different groups became eligible to receive the vaccine, our campaign evolved. Below are highlights of the campaign.

- **Research.** Since beginning our campaign work, we have conducted eight statewide surveys with Texans, 14 in-depth interviews with healthcare professionals, and dozens of in-depth interviews with target audiences. We have also reviewed numerous secondary research reports from across the U.S. Our knowledge of Texans’ attitudes, beliefs, and behaviors regarding COVID is deep and current.
- **Creative.** We’ve evolved messages to support the ever-changing COVID landscape, starting with “Stay Home Texas” and then progressing to safety behaviors, holiday spikes, and vaccine launch and implementation.
- **Media.** The initial campaign focused on general awareness and educated Texans on how to stay safe while waiting for vaccine development. Within the 12-month campaign, our media buys produced more than one billion impressions.
- **Social media influencers.** Combined awareness and vaccine campaigns included 56 posts, with some from well-known macro influencers, delivering 83+ million impressions.
- **Outreach.** In addition to conducting 60 statewide outreach events, we developed and distributed stakeholder materials to numerous partners, including Feeding Texas, Texas A&M University, and Texas Women, Infant and Children’s (WIC) program.



Digital banner ads



Animated digital video ad



Due to the urgent need to begin promoting prevention measures and the shutdown of advertising production studios in the early months of the campaign, we used public domain video clips and in-house illustrations and animations to create media assets. We continued to produce illustrated and animated creative materials to provide fast turnarounds as the stages of the pandemic evolved.

RESULTS

- Our campaign resulted in 77% of Texans receiving at least one COVID-19 vaccine to date, exceeding client expectations.

[Additional Toll Creative Examples for Sherry Matthews Group](#)

LCA PROJECTS

1. RIVERSIDE COUNTY TRANSPORTATION COMMISSION (RCTC), 91 EXPRESS LANE PROJECTS

- Budget:** \$115,384
Duration: 2021-2022
Success Metrics: Deliver all projects on time and within budget.

LCA served as the principal consultant and owner representative for all customer facing portals when the agency transitioned the 91 Express Lanes Back Office System that opened in 2022. These included the program website and IVR phone system, customer communication, and case management.

RESULTS

- Developed and printed 150,000 transponder kits, digital ads, system map, and IVR phone system.
- Delivered all projects on time and within budget.



Digital banner ads



91 Express Lanes welcome kit



15/91 Express Lanes system map



2. RIVERSIDE COUNTY TRANSPORTATION COMMISSION (RCTC), 15 EXPRESS LANES

Budget: \$649,016
Duration: 2017-2022
Success Metrics: Successful launch



[Using the 15 Express Lanes video](#)

LCA served as the principal consultant and owner representative for the brand development for RCTC's 15 Riverside Express Program. Catherine Larson provided the marketing and communications oversight, as well as operations expertise and oversight for the new Riverside Express Customer Service Center, which opened in 2021. Campaign deliverables included a marketing plan, a paid media buy, brand development, digital ads, and transponder installation videos.

RESULTS

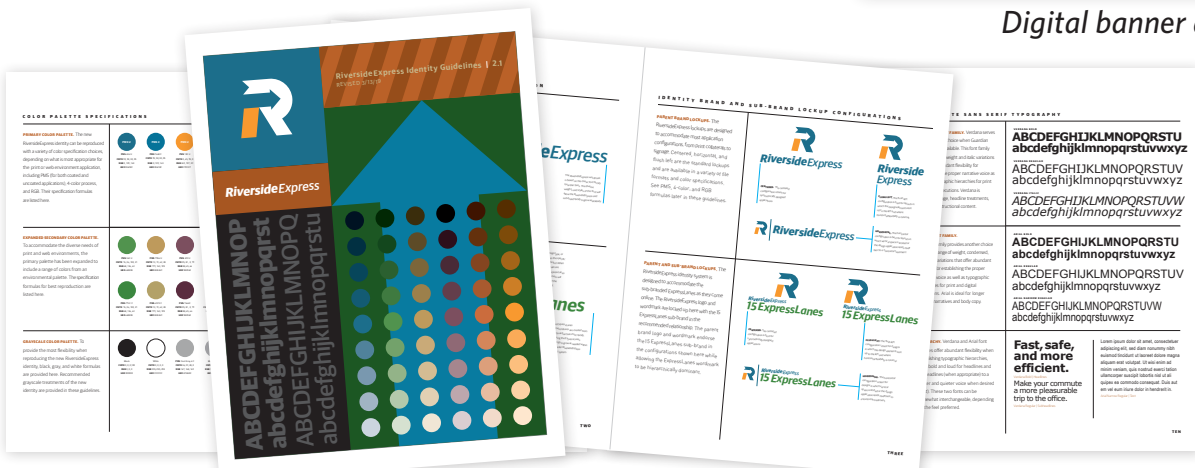
- Achieved a customer satisfaction rating of 98.5%.
- The digital media buy delivered more than 81 million impressions, 514,342 clicks, and a .63% click through rate, well above industry standards.



15 Express Toll Lanes welcome kit and brand guide



Digital banner ads





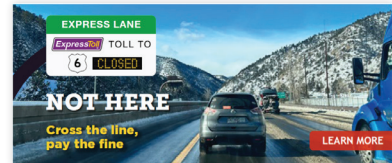
3. COLORADO TRANSPORTATION INVESTMENT OFFICE (CTIO), SAFETY ENFORCEMENT PROGRAM IMPLEMENTATION

Budget: \$693,091
Duration: 2022-Present
Success Metrics: Reduce violation rates.



Billboards on I-70

In addition to our vendor project manager role, LCA supported marketing and communications for the launch of a first-of-its-kind violation enforcement program on Colorado's network of express lanes. LCA was responsible for the concept design of all customer-facing portals and customer communication. In addition, LCA assisted with earned media and marketing strategy and facilitated focus groups to obtain feedback on program materials including website usability plus understanding of the social media ads, billboards, and violation notice.



RESULTS

- When comparing January 2024 to program pre-launch data from September 2023, Colorado has seen a nearly 70% reduction in violation rates, far exceeding expectations.

LUND FAUCETT PROJECTS

Digital ads

1. SEATTLE PUBLIC UTILITIES (SPU)

Budget: \$695,000
Duration: 2021-Present

Success Metrics: Research, outreach and strategic communications results; outreach results; campaign impressions, website/microsite views; successful adoption of Strategic Business Plan and rate increase; quality of media coverage

Lund Faucett has provided and continues to provide strategic, research plus tactical and logistical support to SPU, a provider of water, sewer, drainage, and garbage services to 1.3 million people in the greater Seattle area. Work includes the strategy, development, engagement around and successful adoption of the 2021-2026 Strategic Business Plan; preparation of a strategic communications plan; strategy and positioning to identify funding to address seismic vulnerabilities to the region's drinking water system; and other communications projects. Lund Faucett is currently working with SPU to update their Strategic Business Plan, including writing and strategy support related to ensuring inclusive outreach, especially to communities that have been traditionally underserved.



Strategic Business Plan



Key elements of Lund Faucett’s work with SPU include the development and implementation of research strategies, including fielding innovative surveys and qualitative research as well as comprehensive research synthesis in support of the Plan; comprehensive data gathering and analysis to understand key issues, initiatives and audiences (internal interviews, workshops, and conferring with advisory groups); developing inclusive engagement plans for various audiences; and advising on high visibility issues and initiatives.

Expertise/services provided:

- Research, assessment, data gathering and analysis to understand key audiences and issues.
- Partnerships with staff and outreach to customers and stakeholders to support communications strategies and efforts.
- Development and refinement of communications strategies including plans, messages, identity strategies, dissemination strategies and tactical recommendations about communications tools.
- Analysis of community needs and strategic advice around stakeholder/audience analysis to ensure inclusive engagement.
- Presentation of strategies and materials to agency leaders, staff, and advisory groups.
- Training and support to enhance strategies.



[2022 Drinking Water Quality Report](#)

RESULTS

- In May 2021, Seattle city council passed a resolution authorizing SPU’s rate path as outlined in the 2021–2026 Strategic Business Plan. The Citizen Review Panel supported the plan and city council members went on the record expressing support for the utility’s good work. SPU also generated positive media buzz in advance of the effort and effectively managed critical reporters. Most importantly, employees are embracing and activating the plan. Lund Faucett is currently working with SPU to update the Strategic Business Plan.
- Worked in partnership with SPU and the Water Supply Forum to begin positioning a multi-year, regional effort to identify and secure state and/or federal funding to address seismic vulnerabilities to the region’s drinking water system. This project is currently ongoing.
- Collected key background information, facilitated internal discussions, and leveraged knowledge from external interviews with community opinion leaders to develop a departmental strategic communications plan.

2. WASHINGTON INDIAN GAMING ASSOCIATION (WIGA)

Project budget: \$250,000/year (+advertising and print)

Duration: 2018–Present

Success Metrics: Material distribution, impressions and engagement statistics; benchmarking research (qualitative and quantitative) results; inquiries to organization; successful policy outcomes (legislative and regulatory)



The Washington Indian Gaming Association (WIGA) is a trade association composed of 23 Native American tribes in Washington state. WIGA’s purpose is to advocate on behalf of tribes about the benefits of tribal gaming, as these revenues fund their essential government services.

Lund Faucett provides communications, research, engagement, and government relations support to WIGA. In recent years, efforts to expand gaming to commercial operators have intensified, making it critical to engage decision-makers, influencers, and voters to protect tribes’ right to government gaming. A significant area of the work Lund Faucett does with WIGA includes ongoing strategic planning, evaluation, and re-evaluation of how to best communicate and engage with the wide range of audiences—policymakers, media, communities, businesses, and the broader public—on the importance and benefits of tribal gaming to both tribes and non-tribal communities.

WIGA members represent most of the 29 federally recognized tribes in the state, and each has their own unique communication needs, approaches, and styles.

Lund Faucett helps ensure all tribal voices and audiences are identified, understood, and engaged in planning and activities. They frequently present strategies, plans, and tactics and report outcomes at monthly meetings of the association. They also conduct regular research and tracking that shows the tribes’ growing reputation and influence in the state and that support for tribes and perceptions around tribal gaming have never been stronger.



Washington Indian Tribes Today



Website

Expertise/services provided:

- Assessing communications needs, including the identification and analysis of audiences and information gaps to inform communications strategies.
- Drafting and refining communications strategies including messaging, design/branding, information dissemination, social media, marketing strategies, and advocacy strategies.
- Coordinating with client staff, leaders, and advisors to identify and implement inclusive, accessible, and culturally appropriate strategies.
- Research, assessment, data gathering, and analysis to understand key audiences and issues, benchmark shifting attitudes, and measure success.
- Presenting strategies and materials to tribal leaders, elected officials, staff, advisors, and the public.



RESULTS

- Ongoing public communications and education activities have successfully persuaded policy makers to maintain existing Indian gaming laws and defeated attempts by private entities to undermine this authority.
- Research tracking shows that support for Tribes and perceptions around tribal gaming have never been stronger. There is a growing understanding that tribal gaming dollars support essential services that help some of the most vulnerable communities in our state and that tribal government investments improve people’s lives, Tribal, and non-Tribal alike.
- Public understanding that the entire community benefits from Indian gaming has also increased with record-high website traffic, social media engagement, and advertising impressions.



Economic & Community Benefits of Tribes of Washington

3. KITSAP TRANSIT

Project budget: \$150,000 (across projects)

Duration: 2018–Present

Success Metrics: Survey responses and data quality; website views; social media engagement; rider alerts distributed

Kitsap Transit has implemented a passenger-only ferry service that gives riders a faster trip between Kitsap and King counties. Lund Faucett has provided research, communications, and engagement support to Kitsap Transit for years. During the feasibility and implementation stages of fast-ferry service, Lund Faucett also led outreach and engagement strategy and efforts, including local government and community outreach, planning, stakeholder interviews, telephone surveys, listening sessions, news and social media, and website and materials development.

Lund Faucett led engagement strategy and activities as Kitsap Transit evaluated options for an additional downtown Seattle terminal to support their ongoing Fast Ferry operations, including implementing Early Scoping as part of the NEPA environmental review process. Activities included planning, strategy, research, materials development, stakeholder and public meetings, and traditional and social media.

Lund Faucett is currently supporting Kitsap Transit as it explores constructing a dedicated ferry maintenance facility to meet its ongoing maintenance needs, increase ferry service reliability and directly benefit multimodal transit in the region. Work includes developing a project website, StoryMap and outreach materials; conducting an online survey; and supporting all project engagement with stakeholders and community.

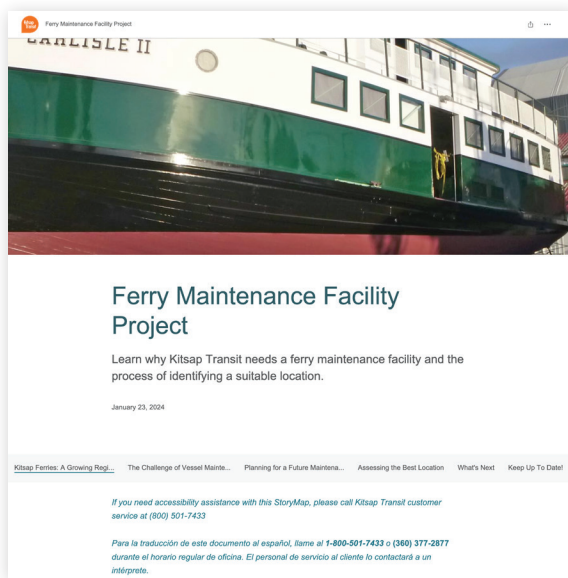


Ferry maintenance facility project website



Expertise/services provided:

- Strategic planning and communications.
- Community and local government engagement.
- Diverse stakeholder outreach, including executive interviews.
- Public engagement, including webinars and community roundtables.
- Research design and analysis, including surveys and focus groups development and facilitation.
- Materials development, including websites, fact sheets, presentations, StoryMaps, talking points and reports.
- News and social media relations.



Ferry maintenance facility project storymap

RESULTS

- Research and outreach results informed Kitsap Transit placing of a ballot measure to fund fast-ferry service, which voters approved.
- Additional communications and research supported initial the fast-ferry service launch in 2017. Service has grown dramatically to include three routes and 10 vessels, Washington’s second-largest fleet.
- The growth and popularity of the fast-ferry service has led to the need to expand fast-ferry terminal capacity in downtown Seattle and to identify and construct a new ferry maintenance facility to meet ongoing maintenance needs of the growing fleet.

SCORING CRITERIA 2: QUALIFICATIONS OF PROPOSED PROJECT MANAGER



Chris Sharman, Project Manager — Prior Experience

With a solid background in tolling, managing state contracts, and a talent for creating innovative, effective consumer campaigns, Chris provides strategic leadership and serves as key decision-maker for client campaigns and related contract management. He oversees all aspects of account direction and client service from strategy, budgeting, and project oversight to marketing plan development, research, creation of estimates, subcontractor oversight, oversight of internal personnel (creative, interactive, billing, paid media, account service, print production), and reporting.

Chris’s 20-year tenure as a vice president of account service at Sherry Matthews Group includes extensive experience in managing public education initiatives for tolling, energy, healthcare, and education sectors. A veteran of dozens of marketing campaigns, he has been responsible for overall project management and strategy, including client relations, strategic planning, message development, press relations, and community outreach/grassroots efforts.



Career Chronology

2012 - Present	Senior Vice President/Account Service, Sherry Matthews Group
2010 - 2012	State Director, ConnectEDU
1999 - 2010	Vice President/Account Supervisor, Sherry Matthews Group
1998 - 1999	Senior Account Manager, Christian-Hubble-Ozmun
1996 - 1998	Chief of Staff/Legislative Director, Texas House of Representatives
1995 - 1996	Assistant to the Director of Programs, Parliamentary Assembly of the Organization for Security and Cooperation in Europe
1990 - 1995	Legislative Aide/Assistant Director, Redistricting Committee, Texas Senate

Education

1998	The Lyndon Baines Johnson School of Public Affairs/Master of Public Affairs
1989	The University of Texas at Austin/Bachelor of Arts in Government

2.A. Provide three examples demonstrating required expertise.

Example 1: WSDOT - [SR 99 Bored Tunnel Project](#)

Dates: 07/01/2017-12/31/2019

Responsibilities: Managed day-to-day advertising contract and all contract for the SR 99 launch and *Good To Go!* pass marketing. Managed research, strategy and message development, all creative development and production, paid media planning and buys, and all reporting.

Example 2: WSDOT - [I-405 Express Toll Lanes Project](#)

Dates: 10/31/2014-05/31/2016

Responsibilities: Managed day-to-day advertising contract and all contract deliverables for the I-405 Express Toll Lanes launch and *Good To Go!* pass marketing. Managed research, strategy and message development; all creative development and production; paid media planning and buys; and all reporting.

Example 3: Texas Department of Transportation - [Click It or Ticket Annual Campaign](#)

Dates: 10/01/2016-09/30/2024

Responsibilities: Manage day-to-day advertising contract and all contract deliverables for the Texas *Click It or Ticket* campaign. Manage all research, strategy, and message development; all creative development and production; paid media planning and buys; earned media; outreach; and all reporting.

2.B. Project Manager's Ability to Manage Projects

Example 1: WSDOT - SR 99 Bored Tunnel Project

- **Adhere to project schedule** - Chris met all deadlines for the project.
- **Adhere to scope of work/avoid scope creep** - Chris produced all deliverables and came in under the budgeted amount.
- **Communicate regarding budget issues** - Chris provided monthly updates on budget expenditures and forecasting. Job estimates were provided in advance for client approval.



- **Manage concurrent projects/campaigns** – Chris managed several other client accounts while handling the SR 99, and many deliverables for SR 99 happened concurrently without issue.
- **Adjust to flexible/evolving project timelines** – Chris adapted project timelines to fit realities on the ground. Sherry Matthews Group prides itself on being responsive to client and project demands.
- **Manage changes that arise throughout the life of the project** – Chris consistently shows his ability to meet challenges and find creative solutions to changes that occur during a project. For example, when project delays prevented filming inside the tunnel, Chris worked with the production team to come up with solutions and use alternate shoot locations and computer-generated imagery to stay on schedule. When a Somalian resource was not available at WSDOT, Chris located, contacted, and secured a partnership with a local Somalian nonprofit to review and approve translations.

Example 2: WSDOT – I-405 Express Toll Lanes Project

- **Adhere to project schedule** – Chris met all deadlines for the project.
- **Adhere to scope of work/avoid scope creep** – Chris produced all deliverables and came in under the budgeted amount.
- **Communicate regarding budget issues** – Chris provided monthly updates on budget expenditures and forecasting. Job estimates were provided in advance for client approval.
- **Manage concurrent projects/campaigns** – Chris managed several other client accounts while handling the I-405 campaign, and many deliverables for I-405 happened concurrently without issue.
- **Adjust to flexible/evolving project timelines** – Chris adapted project timelines to fit realities on the ground. Sherry Matthews Group prides itself on being responsive to client and project demands.
- **Manage changes that arise throughout the life of the project** – Time and again, Chris showed his ability to meet challenges and find creative solutions to changes over the life of the project. For example, the schedule was a bit of a moving target throughout the campaign. Chris and his team updated and pivoted plans seamlessly. When it became obvious that shooting the chosen TV concepts on the I-405 was not going to be feasible, Chris worked with the production company to find alternative locations. For the Flex Pass ordering, Chris and his team sourced and contracted with a local fulfillment company even though it was not in the original scope of the project.

Example 3: Texas Department of Transportation – *Click It or Ticket* Annual Campaign

- **Adhere to project schedule** – Chris has and continues to meet all deadlines for the project.
- **Adhere to scope of work/avoid scope creep** – Chris produced all deliverables and came in under the budgeted amount.
- **Communicate regarding budget issues** – Chris provided monthly updates on budget expenditures and forecasting. Job estimates were provided in advance for client approval.
- **Manage concurrent projects/campaigns** – Chris manages several other client accounts while handling the *Click It or Ticket* campaign.
- **Adjust to flexible/evolving project timelines** – Chris adapted project timelines to fit realities on the ground. Sherry Matthews Group prides itself on being responsive to client and project demands.



- **Manage changes that arise throughout the life of the project** - For the past eight years running the *Click It or Ticket* campaign, Chris has demonstrated his ability to meet and overcome challenges that arise during projects.

2.C. Not included in RFQ

2.D. List of Professional Licenses Obtained in the State of Washington

Chris Sharman, does not have any professional licenses obtained in Washington State.

**SCORING CRITERIA 3: KEY TEAM MEMBERS QUALIFICATIONS
(PRIME CONSULTANT AND SUB-CONSULTANTS)**

3.A.1. Key Team Member Roles and Responsibilities

- Chris Sharman, Project Manager, responsible for all aspects of the project.
- Julie Pippin, Account Supervisor, supports the project manager in day-to-day operations.
- José Marrero, Lead Strategist/Multicultural Marketing Director, provides strategy direction on messaging and multicultural marketing.
- Charles Webre, Executive Creative Director, leads and oversees all creative design elements.
- Karen Purcell, Media Director, directs and oversees all media buys.
- Colin Gilligan, Digital Strategy and Development Director, directs digital strategy.
- Klaudia Marino, Research Director, directs and oversees all research.
- Robert Nash, Public Relations Director, directs and oversees all earned media and crisis communications.
- Wardaleen Belvin, Chief Financial Officer, oversees all contractual and billing requirements.
- Vanessa Lund, Research Manager, supports the research director in implementing research strategies.
- Kristin Faucett, Public Involvement Manager, oversees all public involvement and outreach.
- Catherine Larson, Strategy and Project Consultant, supports the project manager and WSDOT across several project areas, including strategy, public involvement, outreach, earned media, reporting, crisis communications, and troubleshooting.

3.A.2. Prior Relevant Experience

For each proposed key team member, provide up to three (3) examples of prior relevant projects. Include the name of project(s); dates of the project(s); and roles/responsibilities for each team member on those project(s)

Chris Sharman, Project Manager

Project Name	Dates	Roles/Responsibilities
I-405 Express Toll Lanes	2014-2016	Oversaw all aspects of campaign deliverables
SR 99 Bored Tunnel Project	2017-2020	Oversaw all aspects of campaign deliverables
<i>Click It or Ticket</i> (Texas, statewide seat belt campaign)	2016-Present	Oversees all aspects of campaign deliverables



Julie Pippin, Account Supervisor

Project Name	Dates	Roles/Responsibilities
Texas <i>Look Twice for Motorcycles</i> Campaign	2021-Present	Oversees all aspects of campaign deliverables
Texas <i>Click It or Ticket</i> Campaign	2021-Present	Oversees all aspects of campaign deliverables
<i>Talk. Text. Crash</i> Texas Distracted Driving Campaign	2021-Present	Oversees all aspects of campaign deliverables

José Marrero, Lead Strategist/Multicultural Marketing Director

Project Name	Dates	Roles/Responsibilities
I-405 Express Toll Lanes	2014-2016	Oversaw all strategy
SR 99 Bored Tunnel Project	2017-2020	Oversaw all strategy
<i>Click It or Ticket</i> (Texas, statewide seat belt campaign)	2016-Present	Oversees all strategy

Charles Webre, Executive Creative Director

Project Name	Dates	Roles/Responsibilities
I-405 Express Toll Lanes	2014-2016	Oversaw all creative development
SR 99 Bored Tunnel Project	2017-2020	Oversaw all creative development
<i>Click It or Ticket</i> (Texas, statewide seat belt campaign)	2016-Present	Oversees all creative development

Karen Purcell, Media Director

Project Name	Dates	Roles/Responsibilities
I-405 Express Toll Lanes	2014-2016	Oversaw all media strategy and buys
SR 99 Bored Tunnel Project	2017-2020	Oversaw all media strategy and buys
<i>Click It or Ticket</i> (Texas, statewide seat belt campaign)	2016-Present	Oversees all media strategy and buys

Colin Gilligan, Digital Strategy and Development Director

Project Name	Dates	Roles/Responsibilities
TxTag Toll	2019-Present	Digital Strategy and Development
SR 99 Bored Tunnel Project	2019-2020	Digital Strategy and Development
<i>Click It or Ticket</i> (Texas, statewide seat belt campaign)	2019-Present	Digital Strategy and Development

Klaudia Marino, Research Director

Project Name	Dates	Roles/Responsibilities
<i>Talk. Text. Crash</i> Texas Distracted Driving Campaign	2017-Present	Oversees all research deliverables
SR 99 Bored Tunnel Project	2017-2020	Oversaw all research deliverables
I-405 Express Toll Lanes	2019-Present	Oversees all research deliverables



Robert Nash, Public Relations Director

Project Name	Dates	Roles/Responsibilities
Texas Look Twice for Motorcycles Campaign	2016–Present	Oversees all public relations deliverables
Click It or Ticket Campaign	2002–Present	Oversees all public relations deliverables
TxTag Toll Roads	2005–Present	Oversees all public relations deliverables

Wardaleen Belvin, Chief Financial Officer

Project Name	Dates	Roles/Responsibilities
Look Twice for Motorcycles Campaign	2016–Present	Contract and billings
Texas Click It or Ticket Campaign	2002–Present	Contract and billings
TxTag Toll Roads	2005–Present	Contract and billings

Vanessa Lund & Kris Faucett (Firm Founders/Partners), Lund Faucett

Project Name	Dates	Roles/Responsibilities
Seattle Public Utilities: Strategic Public Affairs	August 2021–Present	Vanessa: Project Manager/Client Contact, Research Lead, Strategic Advisor, Materials Lead Kris: Engagement Lead, Strategic Advisor, Materials Support
Washington Indian Gaming Association Strategic Communications	April 2019–Present	Vanessa: Project Manager/Client Contact, Research Lead, Strategic Advisor Kris: Engagement Lead, Strategic Advisor, Government Relations Support
Kitsap Transit Strategic Communications	May 2015–Present	Vanessa: Research Lead, Strategic Advisor Kris: Project Lead/Client Contact, Engagement Lead, Strategic Advisor, Materials Lead

Catherine Larson, Strategy and Project Consultant, Larson Consulting Associates

Project Name	Dates	Roles/Responsibilities
ExpressLanes Program; Los Angeles County Metropolitan Transportation Authority, Los Angeles, CA	2015–2018	Provided program management and toll expertise for policy development, program evaluation, surveys and research, marketing and branding, and toll operations support for the ExpressLanes program. Responsible for the development of the ExpressLanes toll program policies, including the phased approach to address demand on the highly congested ExpressLanes. Developed and managed the agency’s FasTrak declarable transponder rebranding project.



<p>General Tolling Consultant; Washington State Department of Transportation</p>	<p>2008-2018 and 2021-Present</p>	<p>Provided a variety of support in nearly all areas of the WSDOT Toll Division including marketing and communications; responsible for the development of Go Live Plans for the Statewide Customer Service Center and the SR 520 toll conversion implementations; for the development of the 6-C transponder business plan that documented key schedule activities; supported the development and implementation of marketing and communication activities related to SR 520 tolling and the new 6C transponders; supported marketing and communications for the I-405 Express Toll Lanes launch in 2015.</p>
<p>Toll System Development and Implementation/TxTag; Texas Department of Transportation Texas Turnpike Authority, Austin, TX</p>	<p>2005-2008</p>	<p>Served as Program Planning and Development Coordinator; managed policy and procedure development for TxDOT's new statewide toll operations program; project managed first "Pay By Mail" toll road in the United States, SH 121 in Dallas, Texas; project managed one of the nation's first rural toll roads, Loop 49 in Tyler, Texas; supported implementation of 65 miles of new tollway in and around Austin, Texas; and managed TxDOT's statewide toll marketing of Texas Tollways and the TxTag® transponder including program strategy, message development, delivery methods, timing, and allocation of resources for the \$16 million public outreach contract.</p>

SCORING CRITERIA 4: FIRM'S PROJECT MANAGEMENT SYSTEM (PRIME CONSULTANT ONLY)

From our extensive work with public entities, we are sensitive to the risks and constraints government clients face and understand that WSDOT's obligations and expectations are different from those of private sector entities. We take great care to deliver the expected results within budget, on time, and in a manner that builds support from the state legislature, stakeholders, toll customers, and the public.

4.A.1. Describe your firm's Quality Assurance/Quality Control processes.

Sherry Matthews Group is committed to the pursuit of excellence. Quality assurance informs every one of our projects and tasks, and it filters from senior to entry-level staff. Our internal quality assurance plan includes strategies and processes to promote quality, procedures to periodically measure and report quality performance, and controls to assure quality and consistency, including internal and external audits.

Four Phases of Quality Assurance

- 1. PLAN.** This phase is critical to assure high efficiency, effectiveness, quality, and client satisfaction. It includes budgeting, scheduling, resource allocation, work plans (including performance measures), and any research that may be needed. The planning phase also



ensures that staff allocated to the project are skilled, proficient, and have the qualifications and experience needed to complete the project.

2. **DO.** Implement the plan.
3. **CHECK.** Monitor and evaluate the process by testing the project against established goals and objectives.
4. **ACT.** Change course if the Check phase points to the need for improvements or document them in a postmortem report for future projects.

The quality assurance plan also ensures that project activities are managed and implemented in compliance with all relevant federal, state, and local applicable laws, standards, and regulations. For all creative, paid media, public relations, or other projects, we follow procedures that have built-in checks and balances.

Over many years Sherry Matthews Group has developed and produced marketing and customer materials in support of efforts to acquire new TxTag account customers and communicate with existing customers. Materials have included handouts, posters, tag kits for new customers, website copy and graphics, maps, and signage—mostly produced in English and Spanish.

The planning and execution of every public education or marketing project begins with an in-house creative brief that confirms project goals and identifies the target audience, key messages, established branding, print or online specifications, project timeline, and all other fundamental information. We determine the distribution methods and obtain approval of cost estimates before initiating work. We typically prepare multiple creative concepts or design options and then undergo a process of reviewing and refining materials with the client's input.

Quality control from start to finish. Once we develop an execution, our eagle-eyed proofreaders and editors examine every piece of creative before it is sent for client review. Our senior-level design and production staff ensure all print and digital creative files match the project specifications before being produced and at the time of release. We also impose stringent print production standards that ensure all pieces are produced accurately and with the utmost quality. Only print vendors that have met our high standards are included as bidders, and our print production manager press checks every large job.

In summary, we develop strategic briefs for each area of a scope of work, including campaign branding, creative, research, and print production, which provide guidance for each stage of a job and are approved by the client before work begins. We also provide estimates for each job within a project for client approval prior to starting work. We then set several milestones and approval points along the way to ensure transparency and quality.

The account service group is responsible for quality assurance. This team directs all work for an account and is the link between you, the client, and the agency's creative, media, outreach, public relations, and administrative staff. Account directors and managers oversee all project aspects, conferring with clients on key stages of planning, implementation, and reporting to ensure that our work is accurate, on time, and on budget.

4.A.2. Describe your firm's tracking system(s) to monitor the project's budget and/or scope.

Our historical success has been based on building an experienced team and detailed budget



management system that addresses the requirements of all contract projects. Our best practices include but are not limited to the following:

1. A state-of-the-art accounting system, Silent Partner, which facilitates the movement of every aspect of a job through the agency, from estimate to final bill. Using Silent Partner, our accounting department assigns a separate billing code to each job so that associated labor expenses and direct charges can be correctly charged to it, and we can continuously track all job estimates, purchase orders, subcontractor invoices, and time reporting.
2. A cloud-based project management platform, monday.com, which allows all our departments continuous monitoring of timelines and the status of every job. The software can accommodate a client interface as well if desired. We also conduct regular client meetings, with follow up notes and action items, to keep project teams focused, accountable, and on schedule.
3. Regular and detailed budget monitoring that makes accountability and tracking part of ongoing project management services. Each campaign has a detailed budget spreadsheet, so that line-item expenses can be tracked monthly. These internal accounting controls ensure accurate billing and sound financial management of every project, regardless of funding source.
4. A single point of contact for account service and a specialized billing manager who provide flawless management, reporting, and accountability. Chris Sharman, senior vice president and experienced project manager, will serve as the point of contact and provide the leadership and oversight required for this contract. He has successfully managed two previous toll projects for WSDOT: the I-405 Express Toll Lanes and the SR 99 Tunnel. Sarah Muyskens, our senior accounting manager who was responsible for WSDOT client billing from 2017-2020 and who has a thorough understanding of WSDOT's billing and reporting requirements, will monitor and track campaign expenditures and prepare monthly invoices and reports.
5. Detailed custom reports that are developed to help our clients demonstrate accountability within their organization and to funding entities.

4.A.3. List your firm's scheduling program. Identify the type of software and list up to three projects where the proposed Project Manager(s) have utilized this software.

The cloud-based project management platform, monday.com, helps to keep internal teams in the loop and on track with multiple project schedules and components moving simultaneously. For client scheduling, we use Microsoft Outlook and Teams. Chris Sharman, the proposed project manager, uses this software across all his projects. Three current projects are traffic safety campaigns for the Texas Department of Transportation: *Click It or Ticket*, *Look Twice for Motorcycles*, and *Talk. Text. Crash.*

4.A.4. Describe your firm's process for interacting with your internal project team.

In addition to using monday.com and Microsoft Teams, we also depend on traditional communication methods. We hold internal weekly production meetings every Monday morning so everyone in the agency knows what is due and when. Project teams will meet more frequently and use email and Teams messenger to stay connected. Since most of our clients are government entities, we are accustomed to working with finite budgets and timelines that don't allow for overages or extensions. Unexpected situations arise, so we have internal processes and systems in place to respond when project schedules or components change, or to facilitate fast-track projects.



4.A.5. Describe your firm's ability to provide interaction with the Toll Division, our vendors, and/or stakeholders.

Our team has local firms with boots on the ground in Seattle and Tacoma. Since the pandemic, remote interaction through Microsoft Teams, Zoom, or other online conferencing software has become more commonplace, greatly increasing productivity and minimizing wasted time traveling to meetings. However, as with the I-405 ETLs and the SR 99, if members of Sherry Matthews Group need to be on the ground to present information in person, we are more than willing to hop on a plane. Alaska and Delta airlines both have direct flights from Austin to Seattle leaving four times a day.

SCORING CRITERIA 5: PROJECT DELIVERY APPROACH

5.A.1. How does your firm develop a work plan for this project?

Our approach to developing and evaluating campaigns that educate consumers, spur action, and promote behavior change involves multiple steps:

1. We integrate rigorous research with smart concepts and high-impact creative executions.
2. We select the optimum communication tools that will reach and engage the target audience and media.
3. We rely on savvy media negotiations to ensure effective audience reach and deliver added value that substantially increases return on investment.
4. We develop partnerships and identify opportunities to conduct one-on-one and community outreach to extend the campaign's reach.
5. We establish metrics up front to gauge the campaign's success.

Here's how we do it.

At the outset of a campaign, we develop a strategic communications brief that addresses the following fundamental questions: Why are we advertising? Who is our audience? What is the audience saying today? What do we want them to say? What is the single most compelling message we want to deliver? What kinds of communications tools do we need? How will we know whether the marketing worked?

From there, working with our clients, we create a strategic marketing plan that typically:

- Outlines strategies, tactics, and action steps that respond to campaign goals.
- Establishes measurable objectives and measurement methodologies.
- Defines target audiences, not only by conventional demographics but also by insights into their mindsets, behaviors, barriers to adoption, and other psychographic characteristics.
- Proposes recommended strategic campaign concepts, key messages, media channels, outreach tactics, and materials.
- Specifies deliverables, timelines, and budget allocations.

The campaign plan is always finalized in collaboration with our clients. Once approved, it serves as the roadmap that keeps everyone and every deliverable on strategy and ensures timelines and budgets are met.



5.A.2. Who is involved with the decision-making process for the development of the work plan?

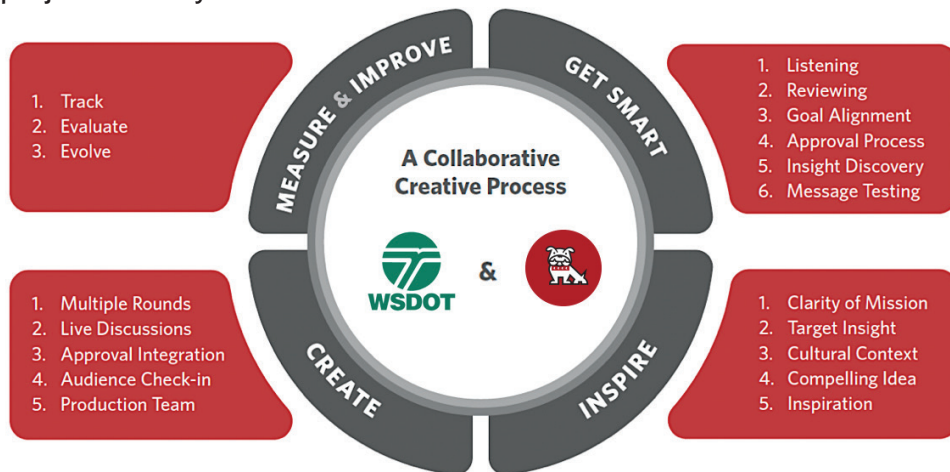
Chris Sharman will be the key decision-maker for work plan development. That being said, Chris will rely on his team for their areas of expertise to help develop the plan. From research, public involvement, message strategy, earned and paid media, Chris is backed up by seasoned professionals, all of whom have worked on WSDOT projects. Chris has put together numerous work plans and has demonstrated strong management capabilities over the past 20 years. His philosophy is to over-deliver and exceed client expectations by carefully managing budgets, developing realistic timelines, and clearly communicating with clients and stakeholders to keep everyone on the same page. He practices the agency's core value of flexibility when approaching projects. Our firm does not nickel-and-dime clients but rather exercises latitude within limits, and Chris knows the checks and balances involved in delivering on scopes of work and intervening before scope creep takes hold.

Chris has proven repeatedly that he can keep the trains running on time. For example, staying on schedule was paramount in the TxTag launch campaign. Despite a number of changes throughout the lead-up to launch—manned tollbooths gave way to all-electronic tolling, an additional project popped up in northeast Texas, and tag distribution channels changed—the project stayed on schedule and all marketing materials were ready on time and on budget. Chris and his team managed all the changes in stride by strategically allocating human resources, enforcing tight budgeting, and sticking to mutually agreed upon schedules. Similarly, he demonstrated his skills on the I-405 Express Toll Lanes and SR 99 launches for WSDOT.

Chris exercises his management skills in preventing scope creep by carefully documenting scope changes when the situation demands. Using well-defined processes to identify scope changes, estimate budget impacts, and get approval for amendments to purchase orders, Chris ensures that quality deliverables meet promised deadlines and budgets.

5.A.3. Describe each element of the work plan.

Developing marketing and communications campaigns is a collaborative effort between our clients and our agency team. Each client brings important insights, goals, history, and perspectives. We build each campaign from the ground up to meet specific goals, objectives, and funding constraints. Our approach benefits from two-way communication at each step: strategizing, exchanging ideas, testing assumptions, developing creative, and refining both concepts and executions. We know both WSDOT and our agency have unique strengths, and we will leverage your expertise throughout the project to ensure we're collaborating and meeting the needs of the projects as they evolve.





STRATEGIC MARKETING PLAN (WORK PLAN) ELEMENTS

As a results-driven agency, Sherry Matthews Group develops and implements strategic plans that serve our clients and advance the project's objectives.

We start each assignment by listening to our clients, documenting their requirements and expectations, identifying marketing challenges and opportunities, and collaborating with clients on planning and implementation. We will work together to answer the following fundamental questions:

- What are the strategic goals (general project direction) and objectives (specific measurable outputs)?
- How will success be defined?
- What are the marketing challenges to overcome?
- Are there any key stakeholders whose perspective or expectations must be considered?

We have developed strategic marketing or work plans for launching new services or initiatives, developing comprehensive education and advertising campaigns, and mapping out multi-year marketing efforts. Our plans typically:

- Outline goals and establish objectives with specific measurable outputs.
- Describe strategies, tactics, and action steps that respond to campaign goals, including any formative research needs and any communication risks.
- Define target audiences, not only by conventional demographics but also by insights into their mindsets, behaviors, barriers to adoption, and other psychographic characteristics.
- Propose recommended strategic campaign concepts, key messages, paid, earned and owned/social media channels, outreach and public involvement tactics, materials development, distribution channels and tactics (retail and other), and evaluation metrics.
- Develop or recommend enhancements to the online storefront after analyzing the customer journey and purchase funnel to identify friction points to desired customer actions.
- Specify deliverables, timelines and milestones, reporting, and budget allocations.

RESULTS-DRIVEN RESEARCH

Successful communications start with strategy. During our research process we discover often-nuanced insights that are actionable and truly change behaviors. Developing a sound research plan is a key part of the work plan. The most critical part of brand development is the discovery phase, as it shapes the foundation for the rest of the creative and marketing deliverables. Before we deploy our design capabilities, we believe that formative research is vital to obtaining tangible results. We do not substitute our instincts and judgment for those of the target audiences.

Our experienced research and strategy team and long-term, proven research partners leverage a wide range of research methodologies to gain insights with audiences; understand attitudes, beliefs, and behaviors; develop messaging; test the effectiveness of campaign concepts; refine marketing and advertising strategies; and track changes and results over time.

BRAND EQUITY AND GUARDIANSHIP

For 40 years Sherry Matthews Group has helped clients build and evolve powerful brands that deliver persuasive messages to promote awareness and effect behavior change. Our process of developing mission-driven brands and messaging strategies integrates rigorous research,



innovative concepts, and strong creative to forge high-impact communications. The key to all successful marketing programs is twofold: 1) developing a brand positioning that is ownable, authentic, and motivating and 2) ensuring that every piece of the campaign execution—whether it’s an advertising concept, potential partnership, or social media post—aligns with the overarching brand platform. Sherry Matthews Group developed comprehensive work plans for both the I-405 ETLs and the SR 99, often incorporating and complementing work being performed by other subcontractors.

CREATIVE

Campaign Briefs

Although every campaign varies, Sherry Matthews Group approaches each one with well-established processes and procedures that provide the foundation for all our successful efforts. We begin a campaign with the creation of a strategic communications brief. After confirming the campaign’s objectives, target audience profile, deliverables, budget, timeframe, and performance measures, we develop a campaign brief that distills this information and answers such fundamental questions as:

- Why are we advertising?
- Who is our audience?
- What is the audience saying today?
- What do we want them to say?
- What is the single most compelling message?
- What kinds of communications tools do we need?
- How will we know whether the campaign worked?

The campaign brief serves as the guiding document that keeps everyone and every deliverable on strategy, on time, and on budget. We write additional briefs for messaging and creative, media planning, and design projects that require printing or specialized production services.

Creative Development

We are immensely proud of the hundreds of awards our agency has earned for creative materials and campaigns, especially some of the nation’s top awards for Austin’s CapMetro transit campaigns and transportation-related projects in the Washington metropolitan region. The true measure of the agency’s creative talent, however, are the successful results generated on behalf of our clients. Our staff includes creative directors, designers, art directors, digital producers and strategists, web developers and designers who have extensive experience in multilingual creative development, and production managers who are the best in the business.

In our experience, the most effective messages promoting behavior change accord with the following strategic themes:

- **Informative:** Tell me something that’s important to me and that I don’t already know.
- **Memorable:** Present messaging in a “sticky” way that makes me remember it.
- **Believable:** Provide information I can easily believe.
- **Clear:** Make the communication easy to understand.
- **Actionable:** Tell me something I can actually do.



- **Empowering:** Give me tools and information to make it easy to change behavior.
- **Respectful:** Respect me and be relevant to my family, culture, and community.

MEDIA PLANNING AND BUYING

Another key piece to a comprehensive work plan is the media strategy and eventually the media buys. Sherry Matthews Group excels in the execution of flawless, strategic media planning. We routinely place the full spectrum of traditional paid media targeting general market audiences and specific demographic groups for campaigns in the Washington metro area as well as for other transit, tolling, and transportation-related client campaigns. We also have solid experience in nontraditional media channels such as influencer marketing, sports marketing, streaming media, and customized media partnerships. We have a dedicated in-house media team solely focused on digital planning, placement, and tracking.

Our media planning process begins with research-based practices to determine the target audience's media preferences and key attributes. We use specialized research tools to gain meaningful insights into audience profiles and media consumption habits. These tools include:

- STRATA media-buying software (Nielsen broadcast and digital ratings).
- Scarborough Media Research (lifestyle, media behavior, and demographic information).
- Maptive Mapping Software and Google Maps for outdoor media planning.
- Social media management tools including Facebook Business Manager, X (Twitter) for Business, TikTok Ads Manager, and Snapchat Ads Manager.
- An extensive in-house media library.

We also draw on measurement tools to collect and assess metrics for digital media buys, social media engagement, website and digital optimization, and other performance measures. These tools include:

- Google Tag Manager for measurement code governance and streamlining.
- Native social media ad servers and associated pixels; for example, Facebook Ads Manager and Facebook Pixel.
- Native self-service search and display ad servers and associated conversion codes; for example, Google Ads and Google conversion codes.
- LumenAd digital media intelligence software that provides holistic management, data unification, near-real-time visualization, and reporting efficiency.

Measurable campaign objectives, research, and market analysis drive our media strategies. All information is documented in a media brief that includes audience demographics and psychographics, languages, market area(s), marketing channels, flight dates, targeted rating points, impressions and other metrics, and added-value goals. Sherry Matthews Group has been exceptionally successful in securing verifiable value-added media for government and nonprofit clients to extend campaign reach and increase ROI.

We have demonstrated strategic thinking and creativity in using geo-targeting for numerous campaigns. One example is CapMetro, for whom we've conducted digital buys specifically targeting regions of Central Texas, individual transit stations, and specific Austin neighborhoods. Mobile ads for MetroRapid High Frequency Routes promoted actual timetables, including how long it would take to get from one location to another using the service.



Digital Media Innovations

Digital media is a crucial part of most campaign strategies, and our plans focus on digital platforms that most effectively reach target audiences while driving key performance indicators. We regularly monitor placements to make sure they are performing according to expectations and to optimize the buy. Our monitoring and tracking process is as follows:

- Using LumenAd and Google Analytics, we track our buys to determine which websites, ads, promoted posts, and search terms are performing the strongest.
- We then adjust the buys accordingly to ensure the best return on investment, increasing impressions on placements that perform best at the lowest cost and eliminating less productive placements.
- We also request that digital publishers optimize the campaign to preset goals, which typically include conversion or click rates.
- Once a campaign is completed, we provide post-buy analysis reports to show effectiveness, reach, frequency, and key insights.

For some campaigns, a single, measurable online goal—for example, purchasing a toll pass—can be targeted and leveraged for advanced machine optimization. For other campaigns that prioritize building awareness, education, or engagement, we focus on the platforms that generate the most Involvements. The Involvements metric is Sherry Matthews Group’s custom and proprietary calculation that weights certain user activity to measure a campaign’s success. Those user activities can include completed video views; active social media engagements such as post reactions, comments, shares, and saves; clicks to a campaign website; and critical actions taken on the website such as opening an account.

Social Media

Social media is a powerful tool to increase and build brand awareness. We approach it from the perspectives of the consumer, first discerning how audiences engage on each channel and then formulating a customized strategy that will be most relevant and appropriate for target audiences across each platform.

In addition to reaching current and potential customers, social media can be an effective tool for communicating with community influencers and media contacts by allowing us to engage with them on a regular basis, keeping them informed about *Good To Go!* news and activities in a nonintrusive way.

We have the capabilities to provide full social media support, including:

- Channel evaluation: assessing every social channel in terms of the fit and benefit to the brand.
- Social persona development: determining the social voice and tone of the brand through a collaborative exercise with clients.
- Content strategy: developing content buckets and themes that will be most effective on each channel and planning for integrated organic and paid distribution.
- Content creation: creating static images, animations, video, and lifestyle photography that support day-to-day content needs as well as large-scale campaigns.



- Social guidelines: producing comprehensive guidelines that will cover everything from imagery standards to how to respond to FAQs with a targeted response matrix, as well as crisis management messaging and procedures.
- Community management: compiling editorial calendars, scheduling posts, monitoring social activity on owned and mentioned channels, and coordinating responses on behalf of the brand.

Influencer Marketing

We are also well-versed in the ins and outs of influencer marketing, where trusted social media personalities deliver authentic, peer-to-peer messages that resonate with a variety of audiences. Influencers generate high engagement rates and prompt their followers to react and engage in the conversation through comments and sharing. Influencer marketing is also effective at bypassing ad blockers and drawing audiences inclined to ignore traditional advertising. With our rising use of influencers in public awareness campaigns, we've developed an in-depth vetting system to identify, evaluate, and select the most strategically effective and appropriate voices. By layering on interest, geographic, and behavioral targeting, we can drive ad content and messages to audiences following popular and trusted influencers. Content can be boosted via paid social media ads to expand the reach. Once our influencer strategy for a new campaign is approved, we identify candidates and quantitatively rank them according to our qualification criteria: content relevance, connection to locale, brand safety, size and demographic and psychographic composition of followers, engagement rates, and overall fit.

MEDIA RELATIONS

The work plan will also outline our earned media strategy. Controlling the narrative and leveraging news coverage is critical for WSDOT and *Good To Go!* to amplify messaging and maintain positive brand equity. We have secured thousands of positive media placements with publicity values in the millions of dollars for our clients nationwide. Venues range from *The New York Times* to National Public Radio's *All Things Considered* to Yahoo's national news page to the Swiss daily, *Neue Zürcher Zeitung*.

Our PR method uses a combination of traditional and nontraditional media approaches to generate TV, radio, and print news coverage and spread our message through social media, local bloggers, and digital news sites. Our success comes from the ability to make it easy for news media to help us tell our story. Our team uses a variety of tactics to engage news directors and reporters and secure their help in getting the word out to the public:

- Writing and distributing news releases, event media advisories, blog posts, customized fact sheets, and op-eds.
- Developing campaign talking points, managing issues, and handling crisis communications.
- Producing B-roll video reels with relevant news-ready footage that make it easier for TV news stations to tell our story.
- Providing one-on-one and group media training sessions for public information officers and campaign representatives.
- Positioning spokespeople to interact with media in live or prerecorded interviews.
- Planning and pitching conferences, summits, and stakeholder meetings to engage the participation of the media and grassroots organizations.
- Following up on any media inquiries after a virtual or in-person event.



Equally important, we will track the results of our efforts, prepare reports that document the news coverage that they generate, and calculate their earned media value.

OUTREACH

Should it be needed, the work plan will also address outreach and event needs. Engaging with local residents in person creates more meaningful and memorable connections. However, it does come at a cost. We always weigh the objectives and costs before recommending a particular strategy. To be sure, outreach and events have their place in some campaigns, but they should not be used in all situations.

To support public grassroots outreach, we can deploy professionally trained activation teams to engage with people at targeted events. An activation can be as simple as a street team acting as “walking billboards” distributing brochures or staffing a full pop-up booth with eye-catching visuals. We’ve even helped support mobile customer service centers for new toll facility launches where the region has no history of tolling.

For each activation, an on-site manager transports supplies, oversees setup, and ensures that each of our trained ambassadors is well versed in key messages, goals, and performance metrics ahead of each event. During the event, staff carry clickers that count impressions, quality engagements, and other identified metrics such as app downloads, items distributed, etc.

TIMELINE AND BUDGET

Finally, each work plan includes a schedule for all deliverables and a detailed budget. We have put together comprehensive work plans for both the I-405 Express Toll Lanes and the SR 99 Tunnel. Our team understands and can meet your expectations.

5.A.4. Describe how your work plan addresses contingencies that may arise during the project.

As part of our due diligence and developing the message strategies, we will also uncover any communication risks. These could be schedule slippage, changes in tolling policies, and changes in the technology deployed. We’ll map out alternatives and contingency plans to the extent feasible, complete with crisis communications and talking points for some of the more likely scenarios. Sherry Matthews Group is very nimble and can and can pivot when a project or circumstances necessitate.

5.B. Describe your approaches to resolve issue(s) within the project team; client(s) and stakeholders.

We have a team of talented individuals, and each will play a key part in ensuring the delivery of a successful educational marketing campaign. Although Chris Sharman will serve as WSDOT’s main point of contact, the whole team will help ensure that there is a continuous feedback loop to confirm that expectations and deliverables are being met.

We have assembled a broadly skilled and highly qualified team of creative staff, public outreach, media and communication strategists, toll experts, transportation policy veterans, and talented writers—all with extensive experience in Washington State as well as nationwide. While each team member brings unique experience, WSDOT will also benefit from a redundancy of skill sets and experience which we believe will deliver a winning and successful campaign.

Our team can resolve any issue related to toll educational marketing, and we will be ready to tackle them through our collaborative and open approach to campaign development:

- **Feedback loops.** Continuous feedback loops will be created to encourage stakeholder input to express concerns.



- **Collaborative decision-making.** We will involve stakeholders in strategic decision-making processes to ensure all voices are integrated into issue resolution.
- **Open communication channels.** We will maintain transparent and open lines of communication to ensure that stakeholders are well-informed, feel valued, and can easily reach out with their questions or concerns.
- **Stakeholder empowerment.** As guided by the WSDOT Toll Division, we will involve all stakeholders identified in activities, events, and updates to ensure they are and feel heard.
- **Data and research.** We use well-grounded research to help guide our final recommendations.

Given our transparent processes, disputes are rare to nonexistent. We are a seasoned team who have all worked together before, with no record of disputes. In terms of stakeholders, we have trained facilitators who can help navigate and reach resolution around any number of issues. Ultimately, WSDOT is the client and Sherry Matthews Group will abide by the decisions WSDOT makes regarding any disputes.

5.C. Identify any key issues and critical milestones for the project.

Final policy decisions.

- Prior to the start of educational marketing, the Washington State Transportation Commission will make final decisions regarding toll rate setting and other policy, such as changes in carpool requirements or new low-income programs.
- Media coverage of policy decisions will begin to inform broader public awareness. Policy decisions also inform education and outreach efforts by providing key information about how the new toll facility will work and what the public needs to do to be ready to do. It also provides us an idea of early public reaction to the new facility.

Outreach and public engagement start dates.

Requirements include:

- Development of outreach and public engagement plan.
 - » Identification of underserved communities and strategies to reach them.
- Translation of materials.
- Development and production/printing of communication materials.
- Website development and storefront.
- Development of event logistics plans.
- Brand ambassador recruitment and training.

Earned media pushes, event launches, press conferences, ribbon cuttings, and media tour dates.

Requirements include:

- Development of earned media plan.
- Development of press materials.
- Media training spokespersons.
- Event planning.



Paid media flight start and end dates.

Requirements include:

- Development and approval of media strategies and buy.
- Development and production of all ads.
- Consumer research, message strategy and testing.
- Creative concepts development and approval.

Transponder sales and distribution start date.

Requirements include:

- Development of distribution plan.
- Fulfillment center/process.
- Website development.
- Development of messages and ads specific to transponder sales/opening accounts.

Facility launch/go live date.

- This is a critical milestone that drives all the milestones before it.

With these key dates, we can put together a detailed project schedule that outlines all the deliverables and steps required to meet project milestones. We know, for instance, that once a TV concept is approved, we need a minimum of eight weeks to produce finished TV spots.

5.D. Describe your approaches to managing multiple concurrent campaigns and/or campaigns with evolving timelines.

We thrive in high-pressure environments. Launching multiple campaigns with simultaneous creative production across several media markets or states is something we routinely do. We also have transit clients who routinely issue multiple, simultaneous task orders.

Because our internal account teams are cross-functional, we can shift human resources to meet spikes in demand. For instance, we have two other account directors who currently work on toll accounts who could be added to the team if necessary. In addition, we have a large pool of vetted subcontractors and freelancers we can tap.

Sherry Matthews Group prides itself on being able to roll with the punches and adapt to changing environments. We understand that legislators and elected representatives work on a different schedule and require special attention. We also understand the complexity of large engineering projects that can suffer delays, or in the case of the TxTag launch, accelerated schedules. We are a full-service agency with the resources to handle these changing circumstances and situations. Our company has a reputation of bending over backwards for our clients, which is why we have so many long-term engagements.

5.E. Describe your approach to identifying and reaching historically underserved and overlooked communities.

Transportation and motorists are just one focus area of our agency. We have an even longer history working with the healthcare and public health sectors, specializing in reaching vulnerable populations served by Medicaid, WIC, CHIP, and multiple other health-related programs for our state, county, municipal, and private-sector healthcare clients. We know that equity and reaching underserved populations is an important charge for WSDOT, and our agency does not



take this lightly or for granted. We have demonstrated through multiple accounts how to reach underserved, vulnerable populations, both in language and in culturally appropriate ways.

Low literacy. To the extent possible, we typically produce state clients' materials at the sixth-grade reading level. Some subject matter can make this challenging, but we use best practices to craft simply constructed sentences, plain language, bulleted information, and plenty of clear space to make materials as easy to understand and approachable as possible.

Limited English proficiency. Leaning on our experience with Diversity, Equity, Inclusion, and Accessibility work across many clients, our plan will address communications in various languages including, at a minimum, Spanish, Vietnamese, Russian, and Chinese (Mandarin and Cantonese). We will work with WSDOT to ensure we are meeting Title 6 requirements and any Limited English Proficiency (LEP) requirements. Sherry Matthews Group's years of experience with multicultural marketing have armed us with formidable expertise in developing multicultural and multilingual strategies and concepts for underrepresented and LEP audiences. This effort requires a disciplined process that includes multiple checkpoints and American Translators Association-certified translators who work with our in-house multicultural specialists.

For the SR 99 project, when WSDOT did not have an in-house resource from Somalia to review and approve those materials, we reached out to and paid (through a donation) a local nonprofit that worked with Somalian refugees to review the materials for accuracy and cultural appropriateness. We also partnered with the Seattle Office of Immigrant and Refugee Affairs to identify special publications and websites reaching LEP communities to place paid advertising, both reaching those communities and supporting the businesses that inform them.

Unbanked/cash preferred. The cash preferred customer needs to know how to get ready for tolling without the use of an auto-replenish account attached to a credit card. The educational marketing campaign for a new toll facility provides an opportunity to remind these drivers of their options to pay in cash.

Tribes. Our team has experience working with specific sovereign nations to handle pre-exemptions. These communities are not just exempt, they should not be tolled, and our approach is guided by this understanding. The Gateway project crosses through the Puyallup Reservation, affecting tribal members directly, and members of our team have been involved in the early policy development and planning to distribute free passes to them. We will continue to build upon that work with the Puyallup as well as the ongoing work with all tribes, particularly the Yakama and Nez Perce, who have specific travel rights in their treaties.

Low income. With our deep bench of government clients, we market several programs for people with low income such as WIC, Children's Medicaid, and the Supplemental Nutrition Assistance Program (SNAP), to name a few. We understand how to reach these communities, whether through minority publications, social media, outreach programs, or poster programs targeting businesses that serve these communities.

The Washington State Transportation Commission was considering promotions for low-income toll customers. If these options are available, we have experience working with nonprofits to reach these communities to help connect them to the promotion prior to the start of tolling.