



Request for Proposals for 2019 Electric Vehicle Ride & Drive Marketing Program

Peninsula Clean Energy is San Mateo County's locally-controlled electricity provider. We are reducing greenhouse gas emissions and offering customer choice at competitive rates.

Offers due Thursday, Jan. 24, 2019 at 5:00 pm Pacific Time

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2 RFP Overview

Peninsula Clean Energy (PCE) programs include advancing the adoption of electric vehicles and transitioning building fossil fuel uses to low-carbon electricity. With this request for proposals (RFP), PCE requests proposals for execution of an electric vehicle (EV) “ride and drive” marketing program to promote the adoption of EVs in San Mateo County.

This RFP:

- Provides general background on PCE;
- Describes the service sought by PCE (scope of work); and
- Provides an opportunity for Proposers to describe their qualifications and assets and explain how they could contribute to the program.

By participating in PCE’s RFP process, a Proposer acknowledges that it has read, understands, and agrees to the terms and conditions set forth in these RFP Instructions. PCE reserves the right to reject any offer that does not comply with the requirements identified herein. Furthermore, PCE may, in its sole discretion and without notice, modify, suspend, or terminate the RFP without liability to any organization or individual. The RFP does not constitute an offer to buy or create an obligation for PCE to enter into an agreement with any party, and PCE shall not be bound by the terms of any offer until PCE has entered into a fully executed agreement.

3 Peninsula Clean Energy Overview

PCE, a community choice energy (CCE) agency, is San Mateo County’s official electricity provider. PCE is a joint powers agency, formed in February, 2016, consisting of the County of San Mateo and all twenty of its cities. PCE provides cleaner and greener electricity, and at lower rates, than the incumbent investor-owned utility (IOU), Pacific Gas & Electric Company (PG&E). PCE plans for and secures commitments from a diverse portfolio of energy-generating resources to reliably serve the electric energy requirements of its customers over the near-, mid-, and long-term planning horizons. For more information on PCE, please go to www.peninsulacleanenergy.com.

PCE’s Strategic Goals:

1. Design a diverse power portfolio that is greenhouse gas free.
 - a. 100% GHG free by 2021
 - b. sourced by 100% CA RPS eligible renewable energy by 2025
 - c. create a minimum of 20 MWs of new local power by 2025
2. Continually strive to offer ECOPlus at rates that are at parity or lower than PG&E rates.
3. Stimulate development of new renewable energy projects and clean-tech innovation in San Mateo County and California through PCE’s procurement activities.

4. Demonstrate quantifiable economic benefits to the County/region and place a priority on local hiring and workforce development practices and environmental justice.
5. Implement programs to further reduce greenhouse gas emissions by investing in programs such as local clean power production, electric vehicles, energy efficiency, and demand response, and partnering effectively with local business, schools, and nonprofit organizations.
6. Maximize and maintain customer participation in PCE.
7. Provide a superior customer experience
8. Build a financially sustainable organization.
9. Foster a work environment that espouses sustainable business practices and cultivates a culture of innovation, diversity, transparency, integrity, and commitment to the organization’s mission and the communities it serves.

4 RFP Schedule

This schedule is subject to change.

<i>Date</i>	<i>Event</i>
Monday, Dec. 10, 2018	PCE launches RFP: publishes RFP Instructions.
Monday, Jan. 7, 2019	Deadline for Proposers to submit questions (see below)
Friday, Jan. 11, 2019	PCE provides responses to questions on PCE’s website
Thursday, Jan. 24, 2019, 5:00 pm PT	Deadline for Proposers to submit proposals
Thursday, Jan. 31, 2019 and Friday, Feb. 1, 2019	Possible in-person interviews of top Proposers
Friday, Feb. 8, 2019, 5:00 pm PT	Anticipated date PCE will notify awardee
Thursday, Feb. 28, 2019	Anticipated date for Board execution of contract

Questions:

- **Question & Answer:** Proposers may submit questions concerning the RFP at programs@peninsulacleanenergy.com. All questions and answers will be shared with all Proposers and will be posted on PCE’s website.
- **Proposal Review:** PCE may request clarifications by email or phone from January 25, 2019, through January 31, 2019. Prompt responses will be requested.

5 Proposal Submittal

Proposals must be received on or before the above deadline and submittal must be by email to programs@peninsulacleanenergy.com with the subject "Proposal - <Organization> EV Ride & Drive Marketing RFP".

Only electronic submittals will be accepted.

Proposals must include:

1. Organization qualifications
2. Considerations and approach for ride and drive marketing
3. Target metrics (total drives, total experiences, total impressions)
4. Schedule
5. Project staff credentials
6. Cost proposal
7. Confirmation of acceptance of contract terms or explanation of proposed contract modifications (see Agreement Terms)

6 Review and Selection Process

PCE staff will evaluate the proposals provided based on the following criteria:

1. Completeness of Proposal
2. Qualifications of the firm and staff
3. Proposed approach to implement project including capacity to maximize impact (total rides, total impressions, cost)
4. Past experience
5. Cost structure
6. Exceptions to PCE's contract template

7 Agreement Terms

Awardees will be required to enter into a contract using PCE's standard contract terms. Modification of the contract terms may be proposed by the Proposer for consideration by PCE but are not guaranteed to be accepted. Rejection of the final terms from PCE is grounds for disqualification.

PCE's standard contract terms are available for review here:

<https://tinyurl.com/pcecontractemplate>

8 Inclusion of Non-Participating Agencies

PCE is asking all responding vendors to indicate their willingness to extend the terms of resulting contracts, inclusive of price, to other interested California-based municipalities, municipally-owned utilities and community choice energy programs. While this clause in no way commits these agencies to contract with PCE's awarded consultant, nor does it guarantee any additional orders will result, it does allow other agencies, at their discretion, to make use of PCE's competitive process (provided said process satisfies their own procurement guidelines) and purchase directly from the awarded contractor. All purchases made by other agencies shall be understood to be transactions between that agency and the awarded vendor; PCE shall not be responsible for any such purchases.

9 PCE Legal Obligations

PCE is not obligated to respond to any offer submitted as part of the RFP. All parties acknowledge that PCE is a public agency subject to the requirements of the California Public Records Act, Cal. Gov. Code section 6250 et seq. PCE acknowledges that another party may submit information to PCE that the other party considers confidential, proprietary, or trade secret information pursuant the Uniform Trade Secrets Act (Cal. Civ. Code section 3426 et seq.), or otherwise protected from disclosure pursuant to an exemption to the California Public Records Act (Government Code sections 6254 and 6255) ("Confidential Information"). Any such other party acknowledges that PCE may submit to the other party Confidential Information. Upon request or demand of any third person or entity not a party to this RFP ("Requestor") for production, inspection and/or copying of information designated as Confidential Information by a party disclosing such information ("Disclosing Party"), the party receiving such information ("Receiving Party"), as soon as practical but within three (3) business days of receipt of the request, shall notify the Disclosing Party that such request has been made, by telephone call, letter sent via email and/or by US Mail to the address or email address listed on the cover page of the RFP. The Disclosing Party shall be solely responsible for taking whatever legal steps are necessary to protect information deemed by it to be Confidential Information and to prevent release of information to the Requestor by the Receiving Party. If the Disclosing Party takes no such action, after receiving the foregoing notice from the Receiving Party, the Receiving Party shall be permitted to comply with the Requestor's demand and is not required to defend against it.

10 Scope of Work

See following page.

Scope of Work

1 Program Overview

Peninsula Clean Energy's mission is to reduce greenhouse gas (GHG) emissions in San Mateo County. Emissions from transportation and building natural gas use comprise the largest sources of GHGs within PCE's territory. This program aims to significantly advance electric vehicle adoption in the region. Research indicates that having experience with electric vehicles (EVs) is strongly correlated with interest in acquiring one.

The 2019 Ride and Drive Campaign will build on the 2018 Ride and Drive Campaign, which delivered 6 events with a mix of dedicated corporate events and open community events generating over 1,000 EV experiences.

2 Term and Budget Range

The contract will be for one year with the option to renew the term at the end of each year for up to two additional years. The expected budget for each year, for the minimum 10 ride-and-drive events per year is not to exceed \$100,000, but depending on the strategy to increase the number of events, increase the number of participants and/or amplify the social visibility of events through creative means, the maximum budget for one year could be as high as, but not exceed \$250,000.

3 Contractor Responsibilities

3.1 Develop Strategy for Amplification of Campaign Events

Contractor will develop a strategy in collaboration with PCE to amplify campaign events through social and earned media to increase secondary marketing to San Mateo County residents. The goal of this strategy is to drive participation at campaign events and stimulate awareness and interest in EVs. This marketing is conceived to emphasize content development at events which can then be used to promote peer-to-peer social media effects highlighting fun, lifestyle choice and EV benefits.

3.2 Develop Materials

Contractor will develop materials for events utilizing PCE branding in all materials. These materials may include handouts, signage, online invitations and other collateral.

PCE will provide tents and feather flags.

3.3 Recruit and Manage Site Partners

Contractor will work with PCE to identify, recommend and secure ideal locations to host EV ride and drive events to ensure that the overall campaign goals are met. PCE is anticipated to provide 10 likely sites.

Contractor will recommend a strategy for recruiting additional sites and will be responsible for recruiting event site partners beyond the 10 likely sites from PCE. Contractor will be responsible for all site partner management. The events should be sited to deliver an average of 120+ test drives.

Where PCE has relevant relationships, PCE will lead outreach. PCE will be identified as the sponsor and lead partner in all communications for all sites.

3.4 Execute Events

Contractor will manage all aspects of the ride and drive events, including host site agreements, insurance, setup/tear down, materials, route management, site plans, dealer outreach and coordination, refreshments, registration, and promotional elements. The events must provide a diverse set of vehicles and a professional and consistently positive experience for participants.

Contractor will collect contact information for each person driving and/or riding in each car, including name, address, email, and a signed waiver from each participant to have this information provided to PCE.

Contractor will develop and execute a promotional plan to advertise the events in conjunction with the site host. Outreach and advertising efforts (using PCE-approved messages and materials) can potentially include social media, web, posters, etc.

Each event must be followed by an event report detailing event outcomes, survey statistics, issues, and follow-ups required, if any.

3.5 Support Social and Earned Media

Contractor will support social and earned media by providing content for mutually agreed channels such as PCE social media accounts. Contractor will encourage posting content by event participants that complements and amplifies PCE messaging. PCE at its discretion may support events with paid media. Contractor may recommend paid media strategies.

3.6 Assess Outcomes

Contractor will develop and implement surveys to assess the impact of the experience for each driver, including a pre-drive survey, post-drive survey, and six-month follow-up survey. Contractor will timely report the results of these surveys after each ride-and-drive event, and six months after each ride-and-drive event to PCE. The last scheduled ride and drive must allow time for the follow-on survey unless otherwise mutually agreed.

3.7 Annual and Final Report

After completion of the final campaign event for the year, Contractor will complete a summary report about the overall campaign (likely 5-10 pages in length). The report will include metrics on attendees, number of ride-and-drives, and assessment of campaign impact to-date. Survey data will be included and analyzed in the final report.

If the contract is renewed for subsequent year(s), the final report in subsequent years must provide both annual and cumulative data and recommendations for future program.