

2019 RFP - Marketing Strategy
RESPONSES TO QUESTIONS - 02.25.19

1. What is the time frame for the project to be completed?

We expect the project to be completed within 4-5 months after start.

2. What will be the involvement of PCE management and board members in the project?

We expect the consultant will interface with current PCE staff in all of the key areas of the PCE organization to gain a good understanding of what we're doing at the project kickoff and at regular intervals during the project. We also expect the consultant will interface with a subset of board members who have particular experience in marketing at the project kickoff and at the end of the project.

3. Will marketing research results that PCE already collected with its residential and commercial customers be made available?

Yes, these will be made available to the consultant that PCE contracts with upon contract start.

4. What final work product, (i.e. a bulleted report, PowerPoint slides, presentation to BoD, etc.) does PCE anticipate requiring?

PCE would expect:

- a written report that includes the consultant's analysis and specific recommendations, and
- a summarized powerpoint presentation that will be presented to the PCE board.

5. What is the budget for this project?

We expect the budget for this project to be between \$60,000 and \$90,000.

6. What current strategies are you implementing? B2B and B2C?

The best place to see the strategies we are implementing is to read through our website.

7. Are you open to a website re-design?

We recently updated our website, but are looking to the marketing consultant to recommend and justify why we would re-design the website, along with any other strategies.

8. Is PCE a non-profit or for-profit entity?

PCE is a government agency, called a joint powers authority, which is a not-for-profit entity.

9. Is your team taking discovery calls?

It is not clear what is being asked here.

10. What data is available to the firm or firms to analyze and inform the marketing strategy and implementation plan?

PCE will provide the winning consultant with all of the information that exists in-house.

11. Do you expect the contractor to conduct the initial data research if proposed in the marketing plan?

PCE conducted a marketing research study in November 2017 regarding awareness of PCE. PCE recently completed a marketing research study regarding awareness of electric vehicles, as well as additional follow up to some of the November 2017 awareness questions. This will be shared with the winning consultant. If the consultant recommends additional market research as part of the marketing strategy development in this project, we do not expect the consultant to conduct that data research. However, the consultant will be considered as a possible vendor to conduct the research if they are interested and qualified.

12. What years will the 3-year marketing plan cover? When would you like the plan to be completed by?

The 3-year marketing plan will cover fiscal years 2020 through 2022 (July 2019 through June 2022). As noted in question 1, we expect the project to be completed within 4-5 months after start.

13. Is there a budget range (or cap) that you'd prefer the work to fall within?

Please see the response to question 5.

14. Is the launch date of contract activities anticipated to be the same as the board contract execution date of 3/28?

Yes, we would like to launch the contract start shortly after the contract execution at the end of March.

15. Is California-specific experience, as opposed to experience outside the state, more heavily weighted in your selection process?

Not necessarily. We are most interested in experience that is applicable to the business and future goals of PCE.

16. Is PR the only portion of the 3-year marketing plan that you would like the selected firm or firms to implement under this contract?

We do not expect the selected firm to implement the PR strategy of PCE. Rather we are looking to the consultant to provide specific recommendation to enhance the PR strategy of PCE.

17. If yes, would the PR implementation portion of the contract extend for all three years of the plan?

Please see response to question 16.

18. The RFP outlines that the marketing strategy will cover three years. What is the duration of the contract?

Please see the response to question 1.

19. Who is the PCE project manager for this project?

The main contact for this project is Andy Stern. There will be a few other PCE staff involved in the project.

20. Will the winning contract work with other PCE vendors or contractors? If so, who and in what capacity?

Please see the response to question 2.

21. How is success measured for this contract?

Utilizing the consultant's expertise in marketing, evaluate PCE's current marketing approach and develop a comprehensive set of recommendations for PCE's future marketing activities, backed up by data and other compelling evidence, for PCE to consider and implement going forward.

22. Can bidders include work examples outside of California?

Yes.

23. Was another firm executing marketing consulting work in the past? If so, are there materials that can be shared (e.g. collateral, metrics, goals, etc.)?

PCE has not had a full-capabilities marketing firm working with us. We have used a variety of firms to provide design support: during PCE's launch in 2016, we had a design firm (Circlepoint) that developed the initial 'look and feel' of PCE's initial outreach and enrollment materials. We have used additional freelance designers, and we have recently hired a new design firm (Essence) to provide design support.

24. To help provide scope for the Cost Proposal section of this RFP, what is the budget range allocated for this bid?

Please see the response to question 5.

25. The RFP is for Marketing Strategy Consulting. Will the winning contractor come up with the strategy, or will they implement the plan, as well?

The winning consultant will develop the strategy. Based on the results of the marketing strategy recommendations, PCE will determine what portions of that strategy it will implement and over what time frame. It is not expected that the consultant will implement the strategy under this contract.

26. In the Project Objective section of the Detailed Project Description, the RFP says that the bidder will be "implementing a robust PR strategy". Is the PR strategy the only portion of the overall strategy the winning bidder will be implementing?

Please see the response to question 16.

27. Do you have an existing PR firm and strategy? If so, what will the winning contractor's role be versus the PR firm? Do you have an existing media list that can be shared?

PCE is working with Tom Mertens for our PR work. We expect the winning consultant to talk to Tom as described in the answer to question 2. PCE has an existing media list that can be shared with the winning consultant.

28. Can you share ECO100 and ECOplus stats, metrics, reports, etc. including breakdown of residential v commercial participants?

Yes, you can find these statistics in the marketing report in the PCE board meeting packets. The latest one can be found here from pages 38 to 43: <https://www.peninsulacleanenergy.com/wp-content/uploads/2019/02/2019-02-28-PCE-Board-Agenda-Packet.pdf>

29. When PCE switches to 100% renewable in 2025, will rates still be 5% lower?

This is part of what we expect the marketing consultant to investigate and recommend. Even though we're focusing on a strategy for the next 3 years, the eventual product transition of ECOplus to 100% renewable in 2025 needs is relevant to this strategy. One of the questions is how does ECOplus evolve when we already have ECO100 – how or should they continue to be differentiated once we reach 2025.

30. Is there an existing PCE marketing strategy that can be shared?

PCE does not have a marketing strategy document per se. We will share all documents with the winning consultant upon project start.

31. Is there a social media and/or paid ads budget? Does this budget need to be included in our cost proposal?

PCE does have a budget for social media and paid ads. The high level budget can be found here: https://www.peninsulacleanenergy.com/wp-content/uploads/2018/07/PCE-FY-2018-19-Budget_Board-approved-062818-1.pdf

The budget for social media and paid ads does not need to be included in your cost proposal.

32. What types of questions do your customer care team typically receive? How frequently are they contacted? Are those who reach out typically residential or commercial customers?

We will share this information with the winning consultant. PCE's call center typically responds to questions from residential customers.

33. Can PCE provide metrics, data, and/or analyses on trends in PCE customer needs (from start of business)?

PCE will share our data with the winning consultant.

34. One of the marketing strategy plan targets is "Evaluation of existing community outreach/communication strategies and activities to determine needs for expansion or changes to

meet the changing landscape of customer needs”. What are the current outreach/communication strategies?

A summary can be found in the September 2018 board retreat package. The agenda packet can be found here on pages 23 to 25:

<https://www.peninsulacleanenergy.com/wp-content/uploads/2018/09/PCE-BOD-Retreat-2018-09-29-Agenda-Packet.pdf>

The presentation slides can be found here on pages 61 to 68:

https://www.peninsulacleanenergy.com/wp-content/uploads/2018/10/2018-09-29-Board-Retreat-Master-Presentation-Slides_jp.pdf

35. One of the Electricity Product Mix goals targets is “Evaluating the value of working to boost voluntary participation in ECO100 product offering”. How does PCE define “value” (e.g. number of participants, revenue, ECO100 awareness, etc.)?

“Value” is in terms of the cost/benefit value.

36. In order to address the targets related to new PCE program offerings, can PCE share what programs will be offered over this 3-year marketing strategy timeline? Additionally, who will be eligible for each of the programs?

The plan for PCE’s program offerings can be found in the Program Roadmap, which can be found here from slides 16 to 30:

https://www.peninsulacleanenergy.com/wp-content/uploads/2018/10/2018-09-29-Board-Retreat-Master-Presentation-Slides_jp.pdf

37. What are the existing community outreach/communication strategies and activities?

Please refer to the answer to question 34.