

Request for proposals

Peninsula Clean Energy (PCE), a California Joint Powers Authority, is seeking proposals from interested marketing agencies.

**Responses are due November 1, 2023 by 5:00 p.m. Pacific Time.**

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# RFP Overview

Peninsula Clean Energy (PCE) is issuing this request for proposals (RFP) for one or more agencies to support our marketing needs, including brand development and implementation, campaign development, creation, production, and campaign implementation including media planning and placement.

We encourage agencies to respond to some or all of our needs. We know that agencies may specialize in the brand, campaign or media aspects of this RFP, and encourage partnerships. We understand that there are some sub-specialties, such as cultural program development – this should not stop you from a proposal to provide for our other needs.

## Background

Peninsula Clean Energy is a public agency providing San Mateo County and the City of Los Banos with clean electricity at lower rates than the investor-owned utility, PG&E. We are seeking marketing agency support for a range of marketing initiatives over multiple years. We plan to evolve our brand platform and strategy, update our marketing strategies to reach and motivate customers to take action on decarbonization, and launch campaigns to raise brand awareness and support new program offerings.

**Brand Strategy**

Our organization is growing and evolving and we are making operational changes to better engage with our customers across all of our channels. We will modify our brand strategy as needed to support these changes. We want to communicate and build our brand with a much larger percentage of the residents in our area to maximize our effectiveness.

**Program Offerings**

In addition to providing cleaner electricity for our customers, we support a variety of programs that drive electrification of new and existing infrastructure to reduce the use of fossil fuels. Most of these programs are for residents, and some are for businesses and municipalities. Current programs include:

* Rebates for switching to heat pump HVAC
* Solar + batteries
* Zero interest loans for electrification

Visit [PenCleanEnergy.com/residential-programs](https://www.peninsulacleanenergy.com/residential-programs) or [PenCleanEnergy.com/commercial-programs](https://www.peninsulacleanenergy.com/commercial-programs/) for more information about our residential and business programs

In 2024, we are launching two new programs that will make electrification more accessible to customers for their homes and vehicles. We are eager to develop marketing strategies that put the customer first, using the right channels and tactics.

## Objectives and goals

Our objectives are:

* Increase awareness from 40% to more than 60% in the next two years
* Build a brand that our customer can relate to and trust
* Generate leads and help customers take advantage of our programs
* Retain customers

# About Peninsula Clean Energy

­Peninsula Clean Energy is a Community Choice Aggregation agency. It is the official electricity provider for San Mateo County and for the City of Los Banos. It was founded in 2016 to reduce greenhouse gas emissions by expanding access to sustainable and affordable energy solutions.

We now provide clean electricity for 97% of the residents in our service territory which has a population of 810,000. We also provide industry-leading energy programs for residents and businesses that help them migrate from the use of fossil fuels.

We provide 100 percent clean (defined as either carbon-free or renewable) electricity and at lower cost than the investor-owned utility (PG&E). And, we are on track to provide 100% renewable energy by 2025.

As a community-led, not-for-profit agency, Peninsula Clean Energy makes significant investments in its communities to expand access to sustainable and affordable energy solutions.

The agency has earned investment grade credit ratings from Moody’s and Fitch. For more information about Peninsula Clean Energy, please go to [PenCleanEnergy.com](http://peninsulacleanenergy.com).

# RFP Schedule

## RFP Schedule

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| --- | --- |
| Event | Date |
| RFP release | September 29, 2023 |
| Deadline to submit questions | October 13 |
| Answers to questions posted | October 18 |
| Proposal deadline | November 1, 5:00 p.m. |
| Notification of shortlisted proposers | November 8 |
| Contract redlines due | November 22 |
| Interviews with shortlist candidates | November 8 - November 22 |
| Selection | December 1 |
| Final contract | December 18 |
| Board of Directors approval | December 21 |

### Questions and answers Questions may be posed to [Grose@peninsulacleanenergy.com](mailto:Grose@peninsulacleanenergy.com) on or prior to October 13. Answers will be posted to this RFP on the website by October 18.

### Proposals due Proposals must be submitted by November 1, 5:00 p.m. and must include the required documents described below.

### Review PCE will evaluate all proposals according to the criteria listed below. During this phase, we will identify and then notify short-listed respondents. Peninsula Clean Energy expects to notify short-listed respondents by November 8.

### Contract redline (shortlisted participants only) Each shortlisted participant will provide any proposed modifications to the PCE standard contract terms in a redline by November 22.

### **Interviews with shortlisted participants** PCE will conduct interviews with shortlisted respondents between November 8 and November 22.

### Selection PCE expects to select the top candidate by December 1.

# Proposal Submittal

**Proposals must be received on or before the above deadline and submittal must be by email to Grose@PenCleanEnergy.com with the subject “2023-2024 Marketing RFP - <Agency name>.**

By participating in Peninsula Clean Energy’s RFP process, respondents acknowledge that they have read, understand, and agree to the terms and conditions set forth in these RFP instructions. Peninsula Clean Energy reserves the right to reject any offer that does not comply with the requirements identified herein. Furthermore, Peninsula Clean Energy 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 Peninsula Clean Energy to enter into an agreement with any party, and Peninsula Clean Energy shall not be bound by the terms of any offer until Peninsula Clean Energy has entered into a fully executed agreement. Only electronic submittals will be accepted.

# Content of Response

Interested vendors must submit the following documents (except those marked “Optional”) to be considered for awarding of this proposal:

## Cover Letter with the following elements

### Reference to this RFP

### Legal business name, address, telephone number, and business status (corporation, limited partnership, individual, etc.)

### Name, telephone number and email address of proposing agency representative with respect to this RFP

### A signature of an authorized individual

## Qualifications and experience

### Statement of qualifications: describe the agency’s specific qualifications and experience relevant to this RFP

### Provide at least three work samples relevant to the scope of work (see Section 7) in this RFP, including overview of project problem, solution, cost and results

### Provide at least three client references who can comment on your agency’s qualifications, processes, cost, and ability

## Approach

### Specify the areas of our needs that you are replying to, or specify any areas of work in the RFP that are not within your area of specialty

### Describe your general process of engaging a client, your creative, review and approval process

### Please respond with your capability, approach, and rough cost (please include estimate of project costs and also your standard billing rates for key personnel) to provide support for our needs as detailed in Section 7, Description of Services, including: Task Area 1: Brand - brand strategy, brand identification, and other branding Task Area 2: Campaigns – marketing strategy and planning, creative development, cultural considerations, campaign management and reporting Task Area 3: Media planning and placement – strategy and planning, expertise in tactical implementation, tracking and reporting of results

## **Supplier Diversity Questionnaire (Optional)** can be downloaded at:https://www.peninsulacleanenergy.com/supplier-diversity-questionnaire-v4/. Note that your response (or lack thereof) will have no impact on your contract status or eligibility to work with Peninsula Clean Energy in accordance with state law.

# Review and Selection Process

Evaluation will be based on a combination of quantitative and qualitative criteria. Peninsula Clean Energy will evaluate each proposal against these criteria and select a subset of respondents to move to the shortlist phase.

Final selection will be based on the overall strength of the proposal, and is not restricted to considerations of any single factor such as cost. The criteria used as a guideline in the evaluation will include, but not be limited to, the following:

1. **Qualifications and experience**
2. **History of successful projects performing similar services**
3. **Completeness of the proposal**
4. **Ability to meet requirements in this RFP**
5. **Existence of and circumstances surrounding any claims or violations against you or your organization**
6. **Cost to Peninsula Clean Energy for the primary services described by this RFP**
7. **References**

# Description of services

PCE is seeking an agency or agencies to support our marketing needs, including brand development and implementation, campaign development, creation, production, and campaign implementation including media planning and placement.

Our organization is planning significant operational changes to how we engage with customers. For example, we are considering the addition of an in-house call center that can provide customers with assistance across the range of rate, program and general questions. We are also planning to expand our ability to offer programs and services to our entire residential base.

We encourage agencies to respond to some or all of our needs. We know that agencies may specialize in the brand, campaign, or media aspects of this RFP, and encourage partnerships. We understand that there are some sub-specialties, such as cultural program development. This should not stop you from a proposal – please specify the services you wish to provide, or explicitly identify those you are excluding from your proposal.

## Brand

We seek marketing agency support for the following:

**Brand strategy**

Develop, clarify, and articulate our brand purpose (what PCE stands for) and promise (the value or experience customers can expect).

Develop voice, personality, and brand messaging. Develop core messaging that informs web content, PR messaging, blog posts, and social content as well as other areas of communication.

Develop a tag line that helps customers who are not aware of us to more quickly and easily understand our brand.

**Brand identity**

Refresh our brand identity, including the look and feel, visual and other design elements that customers experience when they interact with us.

This includes updating the logo, possibly including colors (to provide more contrast for ADA compliance), font (current Ubuntu causes anti-aliasing artifacts in some applications), or a complete redesign. We will want the following:

* A proven process, including review/approval, and track record of success
* Creative development appropriate to the brand needs designed with application and use in mind (our current logo content, complexity, and aspect ratio create problems in many applications)
* Design must be appropriate to the cultures in our served territory, including concerns for Chinese and Spanish-speaking communities, at a minimum
* Design shall not infringe on relevant trademarks/copyrights

Other branding

As part of our brand update we will need brand assets, including:

* Color template, fonts, graphic elements that work together to express our brand, designed with application and use in mind
* Development of all brand element artwork, brand style and use guidelines
* Assistance with implementation, including design of letterhead, cards, PowerPoint and (optionally) web pages (design only)
* Visual development and use guidelines for tag line

## Campaigns

We seek agency support for the development and management of multiple campaigns, such as:

Educational campaigns, which last 6-18 months and may be either broad-based or narrowly targeted, depending on the campaign’s intended audience(s). Program launch and promotional (lead generation) campaigns also last 6-12 months. For example, we have both educational and program campaigns aimed at increasing awareness, creating interest and stimulating action for homeowners to convert from gas to electric appliances. Other educational campaigns we may pursue seek to change energy use behaviors through actions such as load shifting.

For this RFP, we are requesting a more detailed response on these two campaigns:

**An awareness campaign**, envisioned for two years with a goal to increase our brand awareness from 40% to above 60% of our approximately 280,000 residential accounts in San Mateo County and the City of Los Banos. Communications currently include a monthly email that reaches about 200,000 accounts, and has a 50%+ open rate and click-thru rates between 2-7% of those who open, search ads which bring 5,000 visitors monthly to our web site, and social media reaching up to 20,000 and bringing less than 1,000 web site visitors per month.

**EV managed charging campaign** which includes an app, provides customers with control over the charging of their EVs to times of the day which are lower cost, thereby saving them money. This also works as a load shift program, moving charging out of the peak hours. This is for all residential EV owners, about 40,000 currently, and growing quickly. We have contact information for about 50% of the current EV drivers, We expect to be able to find additional EV owners through EV load detection in energy usage and an annual DMV list.

For our campaigns, we seek support as follows:

* Marketing strategy and planning (audience targeting, message development, message testing, channels and marketing mix)
* Creative development, design, and production across conventional and digital advertising which could include social media, email, direct mail, broadcast, video, and other tactics as needed
* Cultural considerations for all broad-based campaigns and specific cultural considerations for targeted communications. In addition, we are looking for customized creative, tactics and delivery to reach certain communities, which may include Spanish-speaking communities, disadvantaged communities, or other
* Campaign management and reporting
* As an example, please provide your approach and rough cost estimates for our awareness campaign and the managed charging EV program launch and promotion

## **Media planning and placement**

We seek support to develop and implement our media plans. This could include, but is not limited to, broadcast (cable, TV, radio, streaming), digital search ads, remarketing, or display. We are open to sponsorships and subscriptions. We will be advertising to San Mateo County and the City of Los Banos. Please comment on your ability to provide the following

* Strategy, planning, and placement for our campaigns, including tactics to reach targeted audiences
* Media expertise and capabilities in broadcast (cable, radio), digital, streaming, outdoor
* Recommendations that include standard and creative options, with expected risks and returns, and relevant benchmarks against which to evaluate our results
* Media placement that, as much as possible, can be tracked and attributed
* Transparent, easy to understand cost analysis
* Weekly or monthly results reporting, as needed
* As an example, please provide your approach and rough cost estimates for our awareness campaign and EV managed charging program launch and promotion

# Agreement terms

Awardees will be required to enter into a contract using Peninsula Clean Energy’s standard contract terms. Modification of the contract terms may be proposed for consideration by Peninsula Clean Energy but are not guaranteed to be accepted. Shortlisted candidates can provide any proposed changes in the contract redline.

Rejection of the final terms from Peninsula Clean Energy is grounds for disqualification. Shortlisted participants will be required to provide any redlines to the standard terms by the date included in the schedule above.

Peninsula Clean Energy’s standard contract terms are available for review here: [PCE Standard Contract Template](https://www.peninsulacleanenergy.com/wp-content/uploads/2023/09/Contract-1-STANDARD-Template-Sept-2023.docx)

# Inclusion of non-participating agencies

(Optional) 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.

# Supplier diversity

Consistent with its strategic goals, Peninsula Clean Energy has a strong commitment to foster a work environment that espouses sustainable business practices and cultivates a culture of innovation, diversity, transparency, integrity, accessibility, and commitment to the organization’s mission and the communities it serves. As part of that commitment, Peninsula Clean Energy strives to ensure its use of vendors and suppliers who share its commitment to sustainable business and inclusionary practices.

To help ensure a diverse and inclusive set of vendors and suppliers, Peninsula Clean Energy’s policy requires it to:

1. Strive to use small, local and diverse businesses and provide fair compensation in the purchase of services and supplies;

2. Proactively seek services from small, local, and diverse businesses and from businesses that have been Green Business certified and/or are taking steps to protect the environment; and

3. Engage in efforts to reach diverse vendors and suppliers to ensure an inclusive pool of potential vendors and suppliers.

General Order 156 (GO 156) are California Public Utilities Commission (CPUC) rules that establish requirements for Community Choice Aggregators (CCAs) with gross annual California revenues exceeding $15,000,000 to report on their utilization of majority women-owned, minority-owned, disabled veteran-owned, persons with disabilities-owned and LGBT-owned business enterprises in all categories. Qualified businesses become GO 156 certified through the CPUC and are then added to the GO 156 Clearinghouse database.

The CPUC Clearinghouse can be found here: www.thesupplierclearinghouse.com. It is the policy of Peninsula Clean Energy that all businesses, including business enterprises owned and controlled by women, minorities, disabled veterans, LGBT, and persons with disabilities (herein “diverse suppliers”) shall have the maximum practicable opportunity to participate in the performance of contracts.

Peninsula Clean Energy’s policies and commitment to diversity are consistent with the principles of GO 156, and, therefore, respondents to this RFP are asked to voluntarily disclose their GO 156 certification status as well as their efforts to work with diverse business enterprises, including those owned or operated by women (WBE), minorities (MBE), disabled veterans (DVBE), lesbian, gay, bisexual, or transgender people (LGBTBE), and persons with disabilities (PDBE).

As a public agency and consistent with state law, Peninsula Clean Energy will not use any such provided information in any part of its decision-making or selection process. Rather, Peninsula Clean Energy will use that information solely to help evaluate how well it is conforming to its own policies and goals. This policy shall not be used to exclude any qualified businesses from participating in Peninsula Clean Energy contracting opportunities.

# Peninsula Clean Energy legal obligations

Peninsula Clean Energy is not obligated to respond to any offer submitted as part of the RFP.

All parties acknowledge that Peninsula Clean Energy is a public agency subject to the requirements of the California Public Records Act, Cal. Gov. Code section 6250 et seq.

Peninsula Clean Energy acknowledges that another party may submit information to Peninsula Clean Energy 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 Peninsula Clean Energy 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.

# General terms and conditions

## **Peninsula Clean Energy’s Reserved Rights:** Peninsula Clean Energy may, at its sole discretion: withdraw this Request for Proposal at any time, and/or reject any or all materials submitted. Respondents are solely responsible for any costs or expenses incurred in connection with the preparation and submittal of the materials for this RFP.

## Public Records: All documents submitted in response to this RFP will become the property of Peninsula Clean Energy upon submittal and will be subject to the provisions of the California Public Records Act and any other applicable disclosure laws.

## No Guarantee of Contract: Peninsula Clean Energy makes no guarantee that a contractor and/ or firm added to the qualified vendor list will result in a contract.

## Response is Genuine: By submitting a response pursuant to this RFP, Respondent certifies that this submission is genuine, and not sham or collusive, nor made in the interest or on behalf of any person not named therein; the submitting firm has not directly or indirectly induced or solicited any other submitting firm to put in a sham bid, or any other person, firm or corporation to refrain from submitting a submission, and the submitting firm has not in any manner sought by collusion to secure for themselves an advantage over any other submitting firm.