

REQUEST FOR PROPOSAL

No. 20-002

For

**MARKETING and COMMUNICATIONS STRATEGY, PUBLIC ENGAGEMENT,
DIGITAL and GRAPHIC DESIGN**

On Behalf of

SAN DIEGO COMMUNITY POWER (SDCP)

Issue Date: April 30, 2020

Bid Response Deadline: 5:00 pm, Friday May 29, 2020

San Diego Community Power

Cody Hooven, Interim Executive Officer
c/o City of San Diego Sustainability Department
1200 Third Ave. Suite 1800
San Diego, CA 92101
(619) 236-6563
CHooven@sandiego.gov

TABLE OF CONTENTS

1. GENERAL INFORMATION3

2. SCOPE OF WORK.....4

3. GENERAL TERMS AND CONDITIONS6

4. REQUEST FOR PROPOSALS PROCEDURE8

5. PROPOSAL SUBMISSION REQUIREMENTS10

6. SDCP RIGHTS.....12

1. GENERAL INFORMATION

A. STATEMENT OF INTENT

This Request for Proposals (RFP) seeks a firm (or firms) to provide a marketing and communications strategy and implementation services for San Diego Community Power (SDCP) to successfully launch service to customers beginning in Spring 2021. This RFP also requests services related to press/media relations and public affairs, web and graphic design, SDCP branding and messaging within the community and various on-line platforms. Finally, the RFP seeks assistance designing and implementing a public engagement strategy in collaboration with community stakeholders that would increase public awareness of SDCP within its member communities and help mitigate customer opt-outs during the three enrollment periods.

B. BACKGROUND

San Diego Community Power (SDCP) is the new electricity provider for the cities of Imperial Beach, Encinitas, La Mesa, Chula Vista, and San Diego, within San Diego County. SDCP's JPA Agreement is the first in California to explicitly state that it will reach 100 percent renewable energy availability and usage by no later than 2035 and beyond, in advance of current State targets. The member cities formed SDCP to achieve this and other goals collaboratively and with greater regional impact. SDCP anticipates beginning service in 2021 and serving approximately 930,000 customer accounts and 7,200 GWh of annual load. For more information, please visit SDCP's temporary website at www.sdcommunitypower.org.

The services requested in this RFP include the following:

1. Agency branding, design, messaging and identity
2. Website design, content development and maintenance
3. Community outreach and stakeholder engagement
4. Marketing and advertising campaign
5. Media relations and public affairs
6. Project management/performance metrics

C. RFP PROCESS

San Diego Community Power intends to procure the services in this RFP in a manner that maximizes the quality of services while also maximizing the value to SDCP and, by extension, the customers of SDCP. Proposers must be able to show that they are capable of performing the services requested either within a single company or in a team approach. Such evidence includes, but is not limited to, the respondent's demonstrated competency and experience in delivering services of a similar scope

as well as the local availability of the proposer's personnel, press and other professional relationships, and other requisite resources that will be needed throughout this engagement.

2. SCOPE OF WORK

A. DESCRIPTION

The firm or firms selected as Contractor(s) will perform professional marketing, public affairs and design services for San Diego Community Power. The Contractor(s) will have the staff capable of meeting the requirements of this RFP. To the extent that a Contractor lacks specific expertise in any of the disciplines needed by SDCP, a professional team of subcontractors or associate firms should be assembled by the lead Contractor to complement their technical expertise.

Under the direction of SDCP staff and in collaboration with SDCP vendors, the selected firm(s) will develop, enhance, implement and maintain a multi-faceted plan for building program awareness, engaging potential SDCP residential, commercial and industrial, and agricultural customers, supporting the program website and design needs, promoting SDCP's 100% renewable program and other product offerings through the customer notification/enrollment process. Efforts in this service category are intended to build brand and program awareness, minimize customer opt-outs, maximize opt-ups to SDCP's 100% renewable product, and set a framework for the development of long-term community engagement for SDCP. The Contractor team shall be available for regular planning calls and presentations to SDCP leadership as necessary.

Detailed tasks in this service category include but are not limited to the following:

1. Agency Branding, Design, Messaging and Identity:

- a. Working with existing program name, San Diego Community Power, develop brand/logo, style guides, and create sub-brand names/logos for different power product offerings and programs.
- b. Working with staff and key leadership, develop core messaging for use on the website, in marketing materials, and for community presentations.
- c. Update and maintain a multi-functional, multi-lingual website (English, Spanish, Tagalog, Cantonese, Mandarin, and Vietnamese) that includes a rate calculator, ability to opt-out of the program and other interactive features.
- d. Develop and maintain social media presence for SDCP using existing platforms in SDCP member communities (e.g. Facebook, Instagram, Twitter, Nextdoor, etc.)
- e. Develop/update program collateral including FAQs, program brochures, fact sheets, event give aways, and power point templates as needed. Note that collateral and customer notifications will be available in 6 languages – English, Spanish, Tagalog, Cantonese, Mandarin and Vietnamese.

- f. If budget allows, develop one or more short informational videos for use on SDCP's website, social media and at community meetings.

2. Web Design, Content Development, and Maintenance:

- a. Content update and redesign of SDCP's current website (www.sdcommunitypower.org) including translation into 5 languages besides English and integration of opt-out/opt-up capabilities and other interactive features.
- b. Develop exceptionally professional, clean, and compelling new pages for SDCP that incorporate best practices in user interface, user experience, and Americans with Disabilities (ADA) compliance.
- c. Demonstrate superior skills in developing functionality within the website to support the needs of the programs and general services of SDCP, such as but not limited to pop-up windows, embedded forms, and dynamic layouts.
- d. Provide and follow a clearly defined process for creation and execution of new web content and features that includes wireframes, mock-ups, user-acceptance testing, final review by client in pre-production environment, and notification of client directly after code release.
- e. Analyze website analytics and recommend ways to improve metrics.
- f. Provide direction and/or instruction to SDCP staff on basic website features in order for staff to self-serve for content updates and other needs.

3. Community Outreach and Stakeholder Engagement:

- a. Develop a communications and outreach plan for staff and Board approval detailing the methods and timing of various local communications strategies including the integration of a media and advertising campaign as outlined below.
- b. At the direction of SDCP staff, work with member cities to support local stakeholder and public outreach which may include but is not limited to meetings with key stakeholder groups, public workshops/webinars, local presentations, event tabling, newsletter articles, and other key outreach/engagement activities. Team members with varied cultural backgrounds and multi-lingual skills will be a key component of this effort.
- c. Develop and maintain an SDCP list-serve to facilitate outreach/engagement activities. Refine/expand use of regular e-newsletters and information blasts to SDCP's list-serve and other local communication outlets.
- d. Sub-contract with community-based organizations to build local capacity and augment SDCP's efforts to carry out outreach and engagement activities. The goal is for SDCP to build and deepen relationships with its member communities to better inform and align about SDCP's programs and to build a sense of "community ownership" with SDCP as a local service provider.

4. Marketing and Advertising Campaign:

- a. Development multi-lingual (English, Spanish, Cantonese, Mandarin, Vietnamese, and Tagalog) and multi-cultural advertising campaign to raise public awareness of SDCP and its offerings; this will include both paid and earned media, print and digital, in a variety of mediums which could include local newspapers, on-line and social media , radio spots, billboards, bus backs/bus shelters, and other strategies to effectively reach future SDCP customers in a positive way
- b. Manage and conduct press outreach – schedule editorial board meetings, draft press releases, op-eds and news articles.
- c. Develop visual look, support content and maintain a regular social media presence for SDCP on Facebook, Twitter, Instagram, Nextdoor, etc.

5. Media Relations and Public Affairs

- a. The successful contractor (or subcontractor within a team) will have an established and respected network of key influencer and press relationships within the San Diego region
- b. Develop and maintain a database for SDCP of local and regional press contacts
- c. Develop a press kit, draft press releases as needed, and develop a plan for regular press engagement and positive earned media
- d. Provide feedback and strategy support for SDCP leadership on public affairs and media relations related to CCA and SDCP.

6. Project Management/Performance Metrics:

- a. Participate in content and design meetings with SDCP staff, including weekly or bi-weekly project calls
- b. Provide presentations and project updates to SDCP Board and leadership as requested
- c. Provide flexible capacity to complete multiple design projects simultaneously during busy periods, and ability to rapidly ramp up or down the capacity dedicated to this contract to meet fluctuating client needs.
- d. Work with staff to develop elements of performance metrics including but not limited to: 1) positive, balanced press, 2) maintaining customer opt-outs at 5% or below.

3. GENERAL TERMS AND CONDITIONS

1. Confidentiality. All data and information obtained from or on behalf of SDCP by the winning contractor(s) and its agents in this RFP including reports, specifications and data shall be treated by the contractor and its agents as confidential. The contractor and its agents shall not disclose or communicate this information to a third party or use it in advertising, publicity or in another job unless written consent is obtained from SDCP. Generally, each proposal and all documentation, including financial information,

submitted by a bidder to SDCP is confidential until a contract is awarded, when such documents become public record under State and local law, unless exempted under CPRA.

2. California Public Records Act (CPRA). All proposals become the property of SDCP which is a public agency subject to the disclosure requirements of the CPRA. If proprietary information is contained in documents submitted to SDCP and the bidder claims that such information falls within one or more CPRA exceptions, bidder must clearly mark such information 'Confidential and Proprietary' and identify the specific lines containing the information. In the event of a request for such information, SDCP will make its best efforts to provide notice to bidder prior to such disclosure. **DO NOT MARK YOUR ENTIRE BID CONFIDENTIAL**. Only mark those elements that you believe contain proprietary information if necessary.
3. Contract Pricing and Compensation. The total value of this contract is undetermined. The schedule of compensation will be mutually negotiated. Responders should clearly identify proposed contract duration(s) and associated costs within their proposals. The prices quoted for services must be valid for the entire period indicated unless otherwise conditioned by the proposer in its proposal.
4. Contract Extension. The term of the contract may be extended by mutual consent for an additional period to be negotiated six months prior to the end of the contract.
5. Incurring Cost. This RFP does not commit SDCP to award or pay any cost incurred in the submission of the proposal.
6. Contractor Invoices. The Contractor shall deliver a monthly invoice to SDCP with detailed expenses so as to ensure that expenditures are not-over extended relative to the agreed upon budget and compensation.
7. Addenda. SDCP reserves the right to revise the RFP documents. Any changes to the requirements will be made by written addenda to this RFP. Any written addenda issued pertaining to this RFP shall be incorporated into the terms and conditions of any contract resulting from this RFP. Addenda will be posted on the SDCP website (www.sdcommunitypower.org). It is the responsibility of the Proposers to check the SDCP website to determine if any addenda have been issued.
8. Insurance. Bidders should be aware of the insurance requirements for contract award. A certificate of insurance must be provided by the successful bidder(s) prior to contract execution in accordance with the executed contract.
9. Ownership of Materials. All original plan documents and other materials prepared by or in possession of the Contractor as part of the work or services under these specifications shall become the permanent property of SDCP and shall be delivered to upon demand.
10. Release of Reports and Information. Any reports, information, data, or other material given to, prepared by or assembled by the Contractor as part of the work or services under these specifications shall be the property of SDCP and shall not be made available to any individual or organization by the Contractor without the prior written approval of SDCP.

11. Copies of Reports and Information. If SDCP requests additional copies of reports, specifications, or any other material in addition to what the Contractor is required to furnish in limited quantities as part of the work or services under these specifications, the Contractor shall provide such additional copies as are requested, and SDCP shall compensate the Contractor for the costs of duplicating of such copies at the Contractor's direct expense.
12. Termination. A termination agreement will be negotiated between the parties that includes provisions on termination for cause and termination for convenience.

4. REQUEST FOR PROPOSALS PROCEDURE

A. TENTATIVE SCHEDULE OF EVENTS

Event	Date
Release Request for Proposals	April 30, 2020
Questions Submitted to San Diego Community Power via Planet Bids	May 8, 2020
SDCP Posts Response to Questions	May 13, 2020
Proposal Deadline	May 29, 2020
Short Listing and Notification for Interviews	June 5, 2020
Interviews	June 12, 2020
Contractor Recommendation/Board Approval	June 25, 2020
Final Negotiations/Contract Execution	July 2020

B. SUBMISSION OF PROPOSALS

The RFP response will be submitted electronically to Planet Bids by 5:00 pm Friday, May 29, 2020.

Questions about this RFP must be received by 5:00 pm May 8, 2020 via Planet Bids. SDCP staff will post responses to Planet Bids and by email no later than May 13, 2020.

All responses must be received by the stated date and time in order to be considered for award. SDCP will not be responsible for and may not accept late proposals due to slow internet connection, or for any other electronic failure (including but not limited to information transmission and internet connectivity failures).

By submitting a proposal, each proposer certifies that its submission is not the result of collusion or any other activity which would tend to directly or indirectly influence the selection process. The proposal will be used to determine the proposer's capability of rendering the services to be provided. The failure of a proposer to comply fully with the instructions in this RFP may eliminate its proposal from further evaluation as determined in the sole discretion of SDCP. SDCP reserves the sole right to evaluate the contents of proposals submitted in response to this RFP and to select a contractor, if any.

Proposals received late will not be opened or given any consideration for the proposed services unless doing so is deemed to be in the best interest of SDCP, as determined in the sole discretion of SDCP.

C. PROPOSAL EVALUATION

Evaluations will be based upon the information provided in the proposals and such other information requested by SDCP as deemed appropriate by SDCP. Proposals must provide clear, concise information and sufficient detail to enable reviewers/evaluators to evaluate the responsiveness and quality of the proposals to all RFP requirements. Proposals that fail to meet the RFP requirements may be rejected; however, SDCP may waive minor irregularities in proposals if so doing would be in the best interest of SDCP. SDCP reserves the right to request additional information from any/all respondents as part of the selection process.

Proposals will be evaluated based on the following non-exhaustive factors.

	BID EVALUATION CRITERIA	POINTS POSSIBLE
1.	Experience and Qualifications: 1. Experience in the areas identified in the “Detailed Scope of Services” 2. Meets “Bidder Qualifications” section 3. Qualifications, professional network and experience of staff performing the work 4. Previous CCA/Energy experience	35
2.	Proposer’s ideas, plans and approach to working with SDCP, its communities, key stakeholders and customers	25
3.	Proposers demonstrated expertise with multi-lingual/multicultural communications	20
4.	Commercial Terms (Price) and Compliance with SDCP Contractual Terms	20
5.	Bonus Points/Special Preferences (optional)	5-10
	Total	100-110

Special Procurement Preferences/Scoring Bonuses:

SDCP has identified the following additional contract preferences which shall receive 5%-10% bonus out of a 100-point scoring system. If bidders are interested in receiving a bonus for one or more of the following preferences, please provide pertinent information supporting your request.

- 1) **San Diego County Preference (5%).** SDCP desires to support San Diego County businesses where possible. Businesses in this category are described as those with

office(s) located in San Diego County and including at least 25% San Diego County residents under their employment.

- 2) **Diversity Preference (5%).** SDCP desires to support diversity among its contractors and vendors by working with women, minority, disabled veteran, and lesbian, gay, bi-sexual and transgender-owned businesses. Please specify if your business or pertinent subcontracted businesses are owned by a person in one or more of these categories.

As reflected in the evaluation criteria, contract award will not be based solely on cost, but on a combination of factors as determined to be in the best interest of SDCP. After evaluating the proposals and any oral interviews, SDCP reserves the right to further negotiate the proposed work and/or method and amount of compensation.

5. PROPOSAL SUBMISSION REQUIREMENTS

A. COVER LETTER

The cover letter should be brief (two pages maximum) and provide a short synopsis of the Proposer's approach to completing tasks and delivering project products and services. Describe how the delivery of services will be provided. If a team arrangement is proposed, SDCP will recognize the integrity and validity of Proposer's team provided that:

- The arrangements are clearly identified, and relationships are fully disclosed; **and** a primary (Lead) Proposer is designated who will be responsible for all contract performance.
- The signature of the individual authorized/obligated to commit the bidder to this project is included.
- In signing proposal, statement that the bidder agrees that the terms of proposal and the costs as submitted are firm for a period of 120 days from proposal due date, unless otherwise negotiated with SDCP

The cover letter should also include:

- The RFP number and title
- Name and address of proposing firms and/or individuals
- Phone and email address of sole or lead proposer
- Primary contact person

B. TABLE OF CONTENTS

This section should include a clear identification of the materials by section and page numbers.

C. QUALIFICATIONS AND EXPERIENCE

1. Bidder shall demonstrate expertise and experience with graphic design, web design and public communications campaign of this size, scope, complexity and unique SDCP customer base. Preference will be given to bidders with previous experience working in the energy field and/or for a community choice energy program that has already launched in California.
2. Bidders shall demonstrate experience with effective use of digital, video-based and social media as well as more traditional methods of print, radio and television media.
3. Bidder shall demonstrate experience with multi-cultural communications campaigns and translation.
4. Bidder shall have experience with content development, design and management of direct mail on specific timelines.
5. Experience working with local and regional press outlets, print shops, and mail houses is desirable.
6. Ethical Vendor Standards. SDCP is committed to the highest standards of responsible behavior and integrity in all its business relationships. SDCP will consider a company's business practices, environmental track record, and commitment to fair employment practices and compensation in its procurement decisions.

D. PROJECT TEAM STAFFING

Please include biographies and relevant experience of key staff and management personnel who would be assigned to the project. Please describe coverage levels of employees who would be assigned to this project. Affirm that no employees working on the engagement have ever been convicted of a felony.

E. SCHEDULE

Please include a detailed schedule with lists milestones and estimated completion dates of each of the tasks and sub-tasks listed in the Scope of Work.

F. PROPOSED BUDGET AND COST OF SERVICE(S)

Please include an estimated budget and fee itemization/cost of service by year and by Task Area included in the Scope of Work as well as any estimates of travel expenses. Include all costs that may be relevant to the services proposed.

G. COMPANY OVERVIEW

Please provide the following for your company:

- Official registered name (Corporate, D.B.A., Partnership, etc.), Dun & Bradstreet Number, Primary and secondary Standard Industry Classification (SIC) numbers, address, main telephone number, and toll-free number(s).
- Primary key contact name, title, address (if different from above), direct telephone number(s).

- Brief history, including year established, relevant financial information and relevant experience with CCAs.

H. REFERENCES

List at least three business references for which you have recently provided similar services. Include contact names, titles, phone numbers and e-mail addresses for all references provided.

Provide at least three client references, if applicable and appropriate, for whom you have provided more than occasional services. Include names, titles, e-mail addresses and phone numbers for these individuals.

I. CERTIFICATES OF INSURANCE FOR THE FOLLOWING COVERAGES:

- Commercial General Liability – for bodily injury, property damage, and personal injury \$1,000,000 – each occurrence \$2,000,000 – in aggregate
- Business Automobile Liability – “any auto” (Company Vehicles) – At least \$1,000,000
- Personal Automobile Liability – “any auto” (Personal Vehicles) – At least \$500,000
- Worker’s Compensation and Employer’s Liability (EPL) – injury or death, each accident At least \$1,000,000 (EPL not required for Sole Proprietor)

J. STATEMENT OF NO CONFLICT/ANTI-TRUST

Please provide a statement that describes how bidder(s) will adhere to anti-trust and collusion laws while providing service to SDCP. Also provide a statement that confirms that bidder(s) and any subconsultants responding to this RFP shall avoid organizational conflicts of interest which would restrict full and open competition in this procurement and subsequent procurements.

An organizational conflict of interest means that due to other activities, business units, relationships or contracts that bidder(s) would be unable, or potentially unable, to render impartial assistance or advice to SDCP consistent with the requirements of California Government Code section 1090; or that a bidder’s objectivity in performing the work identified in the Scope of Work is or might otherwise be impaired; or bidders have an unfair competitive advantage.

6. **SDCP RIGHTS**

Any award of a contract resulting from this RFP will be based upon the most responsive Proposal whose offer will be the most advantageous to SDCP in terms of cost, functionality, effectiveness in meeting goals and objectives, and other factors as specified elsewhere in this RFP, as determined solely by SDCP decision makers. SDCP reserves the right to:

- a. Disqualify any and all Proposals that are not submitted in accordance with the required format described in this RFP
- b. Reject any and all Proposals submitted
- c. Request additional information
- d. Issue Addenda to this RFP
- e. Award all, part, or none of the work contemplated in this RFP
- f. Remedy errors in the RFP
- g. Cancel the entire RFP
- h. Issue a subsequent RFP
- i. Approve or reject the use of a particular subcontractor/supplier
- j. Negotiate with any, all or none of the Proposers. If SDCP is unable to negotiate a final contract Terms and Conditions that are acceptable to SDCP, SDCP reserves the right to award the contract to another Proposer
- k. Accept other than the lowest priced Proposal
- l. Award a contract without interviews, discussions or negotiations
- m. Award a contract to one or more Proposers