

Clean Energy Alliance

JOINT POWERS AUTHORITY

REQUEST FOR PROPOSAL RFP # 2020-005

Professional Services from Qualified Firms for Community Choice Aggregation Communications and Marketing Services

Date of Issuance: May 28, 2020

SUBMITTALS DUE:

5 P.M. (PST)
Friday June 19, 2020

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INTERIM CHIEF EXECUTIVE OFFICER
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*THE CLEAN ENERGY ALLIANCE ENCOURAGES THE PARTICIPATION OF MINORITY- AND WOMEN-OWNED
BUSINESSES*

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I. INTRODUCTION & BACKGROUND

The Clean Energy Alliance is seeking a qualified firm (or firms) to provide marketing and communications strategy, customer outreach and education, media relations and public affairs, web and graphic design, and branding and stakeholder messaging to support the successful launch of community choice aggregation service to customers beginning in May 2021. The request for proposal seeks assistance in these areas with the objectives of increasing public awareness of CEA within its member communities and helping mitigate customer opt-outs during the enrollment period. The services should also address the unique situation of Solana Energy Alliance (a currently operating CCA) to transition its customers to CEA and for SEA to cease operating as a CCA.

About CEA

In October 2019, the cities of Carlsbad, Del Mar and Solana Beach formed CEA, a Joint Powers Authority that will operate a Community Choice Energy program within their city limits, in the San Diego Gas & Electric service territory. CEA's purpose is to be an energy services provider, which benefits the community through the delivery of cleaner and more locally produced electricity, demand reduction, economic investment, and competitive rates for residents, businesses, and municipal facilities in the service territory.

The CEA Board of Directors approved its CCA Implementation Plan and Statement of Intent in December 2019, which was subsequently certified by the California Public Utilities Commission on March 16, 2020, as part of the process to launch a CCA program. CEA plans to serve approximately 60,000 service accounts beginning in May 2021. A copy of the CEA Implementation Plan is available at: <https://www.thecleanenergyalliance.org/implementation-plan>

Solana Beach currently operates the Solana Energy Alliance, the only CCA that is currently serving customers in SDG&E territory. Solana Beach intends to transition its customers from SEA to CEA during CEA's mass enrollment. Once its customers are fully transferred to CEA, Solana Beach will no longer operate SEA. Solana Beach has submitted an amended Implementation Plan, concurrent with the CEA Implementation Plan, that reflects its customers transitioning to CEA.

By law, as a JPA, CEA is a separate legal entity from its member agencies and its budget is completely separate from the general funds of these local governments. Board meetings are open to the public. In addition, CEA will be funded through program revenues.

The service territory of CEA may expand in the future to include additional counties and cities.

II. SCOPE OF REQUIRED SERVICES

The services requested in this RFP include the following:

- Community outreach and stakeholder engagement
- CEA branding, design, messaging and identity
- Website update, content development related to the CCA implementation, and maintenance
- Regulatory required noticing, marketing and advertising campaign
- Media relations and public affairs

- Project management/performance metrics

The firm (or firms) selected will perform professional marketing, public affairs and design services for CEA. 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 CEA, a professional team of subcontractors or associate firms should be assembled by the lead contractor to complement their technical expertise.

Under the direction of CEA staff and in collaboration with CEA vendors, the successful firm(s) will develop, enhance, implement and maintain a multi-faceted plan for building program awareness, engaging potential CEA residential and non-residential customers, supporting the program website and design needs, promoting CEA's programs and 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 voluntary renewable products and set a framework for the development of long-term community engagement for CEA. The firm team(s) shall be available for regular planning calls and presentations to CEA leadership as necessary.

Detailed tasks include but are not limited to the following services:

1. Community Outreach and Stakeholder Engagement:

- a) Develop a communication and outreach plan for staff and Board approval detailing the methods and timing of various local communication strategies including the integration of a media and advertising campaign as outlined below.
- b) At the direction of CEA 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 a CEA list-serve to facilitate outreach/engagement activities. Refine/expand use of regular e-newsletters and information blasts to CEA's list-serve and other local communication outlets.
- d) Work with community-based organizations to build local capacity and augment CEA's efforts to carry out outreach and engagement activities. The goals of which are for CEA to build and deepen relationships with its member communities to better inform and align about CEA's programs and to build a sense of "community ownership" with CEA as its local service provider.

2. Marketing and Advertising Campaign:

- e) Development of multi-lingual (English, Spanish) and multi-cultural advertising campaign to raise public awareness of CEA and its offerings; contractor to recommend medium to provide most effective and efficient marketing and advertising campaign.
- f) Manage and conduct press outreach – schedule editorial board meetings, draft press releases, op-eds and news articles.
- g) Develop visual look, support content and maintain a regular social media presence for CEA on Facebook, Twitter, Instagram, Nextdoor, etc.

3. Media Relations and Public Affairs:

- h) Develop and maintain a database for CEA of local and regional press contacts, key influencers, local elected officials and community-based organizations.
- i) Develop a press kit, draft press releases, and develop a plan for regular press engagement and positive earned media.
- j) Provide feedback and strategy and messaging support for CEA leadership on public affairs and media relations related to CEA and CCA.

4. CEA Branding, Design, Messaging and Identity:

- k) Working with existing program name, Clean Energy Alliance, develop brand/logo, style guides, and create sub-brand names/logos for different power product offerings and programs.
- l) Working with staff and key leadership, develop core messaging for use on the website, in marketing materials and for community presentations.
- m) Update and maintain a multi-functional website that includes ability for customers to make program selections such as opt-up and opt-out and other interactive features.
- n) Develop and maintain social media presence for CEA using existing platforms in CEA member communities (e.g. Facebook, Instagram, Twitter, Nextdoor, etc.)
- o) Develop program collateral including FAQs, program brochures, fact sheets, event giveaways as needed. Note that collateral and customer notifications will be available at a minimum in English and Spanish.
- p) As budget allows, develop one or more short informational videos for use on CEA's website, social media and at community meetings.

5. Web Design, Content Development and Maintenance:

- q) Content update and redesign of CEA's current website (TheCleanEnergyAlliance.org) including Spanish translation, integration of opt-out/opt-up capabilities and other interactive features.
- r) Develop new pages for CEA that incorporates best practices in user interface, user experience and American with Disabilities (ADA) compliance.
- s) Analyze website analytics and recommend ways to improve metrics.
- t) Provide direction and/or instruction to CEA staff on basic website features in order for staff to self-serve for content updates and other needs, as required.

6. Project Management/Performance Metrics:

- u) Participate in content and design meetings with CEA staff, including weekly or bi-weekly project calls.
- v) Provide presentations and project updates to CEA Board and leadership as requested.
- w) Provide flexible capacity to complete multiple design projects simultaneously during busy periods.
- x) 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) other metrics as appropriate.

Term of Agreement

The anticipated term of the agreement is twenty-four (24) months with the option to extend an additional twelve (12) months. The term of agreement shall begin upon execution of agreement.

III. QUESTIONS

Questions are to be submitted to Barbara Boswell, Interim Chief Executive Officer, via email to: CEO@TheCleanEnergyAlliance.org, by 5:00pm, June 10, 2020. Responses will be provided via email by June 15, 2020. Proposers wishing to receive copies of questions and responses must submit the request by June 10, 2020 to CEO@TheCleanEnergyAlliance.org.

IV. SUBMITTAL REQUIREMENTS

Submittals should be concise, well-organized and demonstrate the qualifications, experience and approach necessary to provide the required scope of services. If awarded, the responder's proposal will be incorporated into a final agreement between CEA and the selected contractor(s).

Submittals shall include, at a minimum, the following items in the order listed:

Cover Letter

The cover letter should be brief (two pages maximum, no less than 11 size font in Calibri).

Please mark with an "x" the services included in this proposal

<input type="checkbox"/>	Community Outreach and Stakeholder Engagement
<input type="checkbox"/>	CEA Branding, Design, Messaging and Identity
<input type="checkbox"/>	Marketing and Advertising Campaign
<input type="checkbox"/>	Media Relations and Public Affairs
<input type="checkbox"/>	Web Design, Content Development and Maintenance
<input type="checkbox"/>	Project Management and Performance Metrics

State which services are being propose for as outlined in the chart above, provide a short synopsis of the proposer's approach to completing tasks and delivering project products and services and describe how the delivery of services will be provided. If a team approach is proposed, the response must:

- Clearly state which firm will be response for which service;
- Clearly identify arrangements and disclose relationships;
- Designate a primary (lead) proposer for all contract performance;
- Be signed by individual authorized to commit the team to the project;
- Include a statement that the team agrees that the terms of the proposal and costs as submitted are firm for a period of 120 days from proposal due date, unless otherwise negotiated with CEA.

The cover letter should also include:

- RFP number and title
- Name and address of proposing firms and/or individuals
- Name of primary contact
- Phone number and email address of lead or primary contact

Table of Contents

The table of contents should include a clear identification of the materials by section and page number.

Company Overview

Please provide the following for your company:

- One page maximum, no less than 11 size font in Calibri
- Official registered name (Corporate, DBA, Partnership, etc.), address, main telephone number and website.
- Brief history, including year established, relevant financial information and relevant experience with CCAs.

Statement of No Conflict/Anti-Trust

Provide a statement that describes how bidder(s) will adhere to anti-trust and collusion laws while providing services to CEA. Also provide a statement that confirms that bidder(s) and any subconsultants responding to the 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 CEA consistent with the requirements of California Government Code section 1090; or that a bidder's objective in performing the work identified in the Scope of Services is or might otherwise be impaired; or bidders have an unfair competitive advantage.

Approach to Scope of Services

Describe the approach to be taken in meeting the Scope of Services (as outlined above), and how the approach provides the best value to CEA and ensures compliance with all regulatory and operational requirements. Special attention should be paid to the unique circumstance of Solana Energy Alliance, an operating CCA, to transition to Clean Energy Alliance. Proposer should address potential challenges related to the tasks, and identify potential strategies to address those challenges, and discuss how the responder's experience will minimize/address challenges.

Bidders are encouraged to propose enhancements or procedural or technical innovations to Scope of Services that do not materially deviate from the objectives or content of services included in this RFP.

Bidder(s) shall:

- Provide a narrative, which addresses the Scope of Services, and shows understanding of the needs and requirements of CEA.
- Describe the approach to completing the tasks specified in the Scope of Services. The work plan shall be of such detail to demonstrate the bidder's ability to accomplish the project objectives.
- Outline sequentially the activities that would be undertaken in completing the tasks and specify who would perform them and what the associated costs would be.
- Furnish a project schedule for completing the tasks in terms of elapsed weeks from the project commencement date to ensure readiness and CEA's successful launch in May 2021.
- Identify methods that bidder(s) will use to ensure quality control as well as budget and schedule control for the tasks.

- Identify any special issues, problems or risks that are likely to be encountered in completing the tasks and how the bidder(s) would propose to address them.

Schedule

The response should include a detailed schedule which lists milestones and estimated completion dates of each of the tasks and sub-tasks listed in Scope of Required Services.

Fee Schedule

The response should include a fee schedule that provides itemization of costs by tasks, and an optional monthly flat fee, in the format as shown below:

Task	Estimated # hours	Estimated Costs	Optional monthly flat fee	Other Costs

Firms' hourly billing rate fee schedule for all personnel likely to be engaged in completing the tasks should be included.

References

Provide three (3) references, including names and contact information for which the firm has performed similar work. References should not include any CEA member agencies, interim staff or Board members.

Project Team Staffing

Include relevant experience of key staff and management personnel (one page maximum per person) who will be assigned to the tasks, and the specific roll and tasks the staff will be responsible for completing. Please describe the coverage level of employees who would be assigned to this project. Affirm that no employees working on the engagement have ever been convicted of a felony.

V. Evaluation

Evaluations will be based upon the information provided in the proposals, oral interviews and such other information requested by CEA as deemed appropriate by CEA. Proposals must provide clear, concise information and sufficient detail to enable reviewers 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, CEA may waive minor irregularities in proposals if so doing would be in the best interest of CEA. CEA 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. Each of the task areas (1-6) included in Scope of Required Services will be scored using a 100-point maximum to allow bidder(s) to propose on one or more tasks, as a single response or team, and for CEA to fairly evaluate responses for each task category.

Bid Evaluation Criteria for each Task Area	Points Possible
Experience and Qualifications; Meets bidder qualifications; Experience of staff performing work; Previous CCA experience	35
Proposer's ideas, plans and approach to working with CEA, its communities, key stakeholders and customers	35
Cost to CEA	30

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 CEA.

Upon ranking of the submittals based on a review of the selection criteria, top ranked firms will be invited to an oral interview (likely via video conference). Subsequent to interviews, the selection committee will present a recommendation to the CEA Board of Directors.

Recommendation to the CEA Board of Directors based upon the firm's current ability to provide the highest quality of service that meets the requirements and objectives of this RFP, the needs of CEA, and deemed to provide the best value to CEA.

This RFP does not commit CEA to award a contract for any costs incurred in the preparation of the submittal. CEA reserves the right to accept or reject any or all submittals, or any part of a submittal received as a result of this request, to waive minor defects or technicalities, to award multiple contracts, or to solicit new submittals for the same scope of work or a modified scope of work, or to extend, expand, or cancel in part, or its entirety, this RFP if it is in the best interest of CEA to do so. CEA will not reimburse any of the proposers for their costs to prepare and submit a proposal.

VI. CONDITIONS GOVERNING THIS PROCUREMENT

Schedule

This section of the RFP provides the anticipated schedule for the solicitation and describes the events and the conditions governing the procurement. CEA will make every effort to adhere to the anticipated schedule below:

Issue RFP	June 1, 2020
Deadline for written questions to be submitted (email)...	June 10, 2020 5:00 pm PST
Responses to written questions (email).....	June 15, 2020
Submittal due date	June 19, 2020 5:00 pm PST
Evaluate Proposals	June 19 - 26, 2020
Interviews of Selected Firms.....	Week of June 29, 2020
Results to Board for Selection	July 16, 2020

General Covenants

Rights of CEA

This RFP does not commit CEA to award, nor does it commit CEA to pay any cost incurred in the submission of the proposal, or in making necessary studies or designs for the preparation thereof, nor

procure or contract for services or supplies. Further, no reimbursable cost may be incurred in anticipation of a contract award.

CEA reserves the right to reject any and all proposals, to waive any minor irregularities in a proposal, to request clarifications or additional information from an institution, to award all or only a portion of the Scope of Services and to reject any agreement deemed by CEA to be in its best interest with one or more institutions.

Claims against CEA

Neither your organization nor any of your representatives shall have any claims whatsoever against CEA, or any of its respective officials, agents, or employees arising out of or relating to this RFP or these RFP procedures, except as set forth in the terms of a definitive agreement between CEA and your organization.

Form of Proposals

Electronic proposals only will be accepted.

Amended Proposal

Proposers may submit amended proposals before the Deadline to Submit Proposals. Such amended proposals must be complete replacements for previously submitted proposals and must be clearly identified in a written format. CEA will not merge, collate, or assemble proposal materials.

Withdrawal of Proposal

Proposers may withdraw their proposals at any time prior to the Deadline to Submit Proposals. The proposer must submit a written withdrawal request signed by the proposer's duly authorized representative addressed to and submitted to the Contact.

Late Responses

To be considered, proposals must be received via email by June 19, 2020, 5:00 PM PST.

No Public Proposal Opening

There will be no public opening for this RFP.

Public Records Act (CPRA)

Please note that any information provided as part of a submittal in response to the RFP may be subject to the Public Records Act (PRA). If the Proposer feels that any part of its submission is proprietary information, please identify by section, paragraph, and page the information the Proposer believes is proprietary. In the event of a PRA, this information may be reviewed by CEA's attorneys for applicability. No guarantee can be provided that any part of the Proposer's information will be kept confidential.

Confidentiality

All data and information obtained from or on behalf of CEA by the Proposer and its agents in this RFP process, including reports, recommendations, specifications, and data, shall be treated by the Proposer

and its agents as confidential. The Proposer and its agents shall not disclose or communicate this information to a third party or use it in advertising, publicity, propaganda, or in another job or jobs, unless written consent is obtained from CEA. Generally, each proposal and all documentation, including financial information, submitted by a Proposer to CEA is confidential until a contract is awarded, when such documents become public record under State and local law, unless exempted under PRA.

VIII. SUBMITTAL & REVIEW

Firms must submit required materials no later than 5:00 PM on June 19, 2020, via email to CEO@TheCleanEnergyAlliance.org. Please title the email in the subject field as "CEA RFP 2020-005 Communications and Marketing Services". Submittals received after the specified time will not be considered and will be returned to the responding firm.

For additional information, please contact Barbara Boswell, Interim Chief Executive Officer, Clean Energy Alliance by email at CEO@TheCleanEnergyAlliance.org.

IX. EQUAL OPPORTUNITY

CEA requires all proposers to comply with equal opportunity policies. CEA's contracts are open to all persons without regard to race, religion, color, national origin, sex, age, marital status, handicap, or political affiliation.