

Request for Proposal
**2013 Energy Upgrade California™
Earned and Social Media Services**



This RFP is being issued by the California Center for Sustainable Energy on behalf of the 2013-2014 Statewide Marketing Education and Outreach program, funded by California ratepayers served by Pacific Gas and Electric, Southern California Edison, Southern California Gas Company and San Diego Gas & Electric under the auspices of the California Public Utilities Commission.

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1. ABOUT THIS RFP AND THIS SOLICITATION

A. Company Overview

The California Center for Sustainable Energy (CCSE) is an independent, nonprofit 501(c)(3) organization that helps residents, businesses and public agencies save energy, reduce grid demand and generate their own power through a variety of rebate, technical assistance and education programs. CCSE is working with the California Public Utilities Commission (CPUC), the California Energy Commission (ENERGY COMMISSION), and the state's four largest investor-owned utilities (IOUs): Pacific Gas and Electric Company; San Diego Gas & Electric Company; Southern California Edison Company; and, Southern California Gas Company to manage Energy Upgrade California™.

Energy Upgrade California is a statewide marketing, education and outreach (SW ME&O) initiative, to promote energy management concepts, energy efficiency actions and clean energy opportunities for the state's residents and small businesses. This request for proposal (RFP) will be an integral part of this larger SW ME&O initiative, Energy Upgrade California™.

CCSE invites you to submit a proposal in accordance with the following project description. In addition to the minimum requirements requested herein, bidders are encouraged to submit additional plans or information wherever further efficiencies and benefits are achievable.

For the purposes of this RFP, CCSE shall be identified as "CCSE", and the service provider sought shall be "Bidder" or "Contractor".

B. Executive Summary

The purpose of this RFP is to provide the opportunity for parties to submit bids to provide comprehensive earned and social media services to promote and support the approved 2013-14 Energy Upgrade California marketing plan and related activities that may engage the Energy Upgrade California brand and programs in 2014 such as communication to Californians about climate action programs and energy financing. All interested parties and qualified firms should review the criteria set forth, and submit relevant proposals by the deadline. CCSE is issuing this RFP and will manage the contract.

The Energy Upgrade California brand was developed under the direction of the California Energy Commission to support a suite of programs launched in March 2011 and managed by utilities, local governments and nonprofits designed to drive deep energy savings in buildings through a comprehensive approach that included assessments and bundled rebates. More than \$20 million from the American Recovery and Reinvestment Act (ARRA) was spent on Energy Upgrade California marketing, education and outreach in 2011-12 by various partners in support of the brand. In 2012, the CPUC ordered that Energy Upgrade California be transitioned to become a more comprehensive umbrella brand for energy management solutions, continue to support deep energy retrofits and also encompass a wide array of additional actions and concepts. To determine

if this transition was feasible, CCSE conducted a brand assessment in late 2012 that evaluated the Energy Upgrade California brand.

The assessment provided insight to understanding consumer brand recognition and attitudes towards Energy Upgrade California. In general, the report found that residential and small business consumers had relatively low awareness of and familiarity with the brand and its mission and that the brand has potential to evolve to include broader energy management solutions in addition to deep energy retrofits programs.

In addition, an assessment of consumer-facing, energy-focused websites was conducted to inform development of a new website. Using the assessment findings, an RFP was issued and a digital agency was hired in July 2013 to develop a new one-stop energy management web portal designed to educate, activate and motivate residential and small business customers to take action to save energy and use clean energy options. CCSE transition efforts to date have also included a marketing plan outlining the strategy, purpose and key tactics for the brand and its associated marketing, education and outreach program message testing that is currently ongoing along with updates to the brand guidelines. These and other resources are available here:

www.energycenter.org/2013-Earned-and-Social-Media-RFP

Information about the CPUC proceeding and related documents are also available on the CPUC website: <http://www.cpuc.ca.gov/PUC/energy/Energy+Efficiency/Statewide+Marketing.htm>

C. Objective

The objective of this RFP is to solicit qualified firms (Bidders) to propose the development and implementation of a comprehensive earned and social media communications plan to promote and support the integrated statewide Energy Upgrade California SW ME&O program. This program is designed to engage residential and small business consumers in demand-side energy management concepts in a fresh way that will compel them to be more aware of how and why their energy use matters and take action to use energy at the right times, save energy through conservation and efficiency, and invest in distributed generation and enabling technologies.

The funding for the work identified in this RFP will be allocated from the SW ME&O budget for delivery of work product and efforts under the SCOPE OF WORK and according to the TERMS AND CONDITIONS.

D. Services

The services required by the selected Bidder include the following:

STRATEGY

1. Earned and Social Media Strategy: development of a comprehensive earned and social media communications strategy that will promote and support Energy Upgrade California as a trusted

source of energy information and energy management resources among media outlets, social media outlets to engage and educate Californians about the initiative

2. Coordinated Partner Communications Strategy: development of a related strategy for collaborative efforts with partner organizations to effectively coordinate grassroots and influencer campaigns to support awareness of Energy Upgrade California and its related goals. Partners will include IOUs, state agencies, local governments, businesses, non-profits and other statewide synergistic energy, environmental or sustainably focused initiatives.

IMPLEMENTATION

1. Integrated Earned and Social Media Plan: development and implementation of an earned and social media communications plan that will be aligned and integrated with the approved Energy Upgrade California marketing communications plan. This plan shall be carried out through earned and social media activities that may include, but not be limited to, news releases and media events, opinion and editorial coverage, radio and television talk show appearances, public service announcements, grassroots activities, viral online campaigns, blogs, social media sites, or other related activities to be recommended by the selected agency and the marketing team implementing the integrated communications plan selected via a separate solicitation that is currently completing. This plan will have a related coordinated partner communications plan that will connect this effort with Energy Upgrade California outreach and partnership development.
2. Key Performance Indicators (KPIs): with the assistance of the CCSE's Energy Upgrade California team, develop KPIs to track effectiveness of earned and social media and develop plan for analyzing and sharing campaign results with all stakeholders.
3. Budget Development & Management: develop budget and provide management oversight of budget to include reports outlining burn rate, budget vs. actual, etc.
4. Reporting: provide monthly, quarterly and annual analysis and reports of earned and social media exposure to include cost of advertising vs. earned/social media cost, return on investment (ROI), audience reach, target segmentation, demographics, and other metrics to be determined by the agency.

E. Parameters

This RFP will award one purchase order that will be managed by the selected Contractor. If the execution of the Scope of Work requires the hiring of sub-contractors, clearly state this in the proposal and define the work of the sub-contractor(s). This is an open and competitive process. The evaluation will be on a best value basis considering the Requirements and Evaluation Criteria contained in the solicitation.

F. Eligibility and Minimum Contractor Requirements

CCSE needs one “Prime Contractor.” If your company is not best in class in meeting each of these criteria, CCSE is open to you serving as the Prime Contractor with strategic alliance partners on your project team who do meet the criteria, except where specified for the Prime Contractor.

1. Team experience minimum of ten (10) years. Prime Contractor’s business must have a minimum of two (2) years in operation and an office located in California.
2. Proven experiences (documented over time) designing social impact/behavior change earned and social media campaign(s) to advance widespread education/information among diverse audiences that will drive behavior modification by California residents and small businesses, and ultimately leads to a consumer taking a quantifiable action.
3. Experience in the development and implementation of earned media, communications and social media strategies and concepts that relate to energy efficiency, renewable energy, energy management, environmental sustainability initiatives, state programs, or energy utilities.
4. Knowledge and demonstrated experience effectively reaching California’s diverse population and geography in both the residential and nonresidential sectors, and a track record reaching lower income/ethnic/hard to reach targets.
5. This contract requires that a portion of sub-contracted work be awarded to WOMEN, MINORITY AND DISABLED VETERAN OWNED BUSINESS ENTERPRISES (WMDVBE) and Small Business and Disadvantaged Small Businesses. The portion is not pre-determined, and we encourage as much diversity as feasible. Contractors and project teams will be awarded bonus points for WVDVBE inclusion.
6. Contractor will need to demonstrate specific cultural communication and in-language expertise in the Hispanic and Asian markets or subcontract with agencies that have this expertise. Strong experience in performance tracking and discussion of previous instances in which such tracking enabled the firm to adjust execution to improve performance.
7. Expert ROI and response analytics.
8. Strong strategic earned and social media channel segmentation (for both residential and nonresidential customers).
9. Ability to build consensus and demonstrated collaborative skills and experience.
10. Strong relationships with major media and social media outlets.
11. Strong track record of measurable and successful social marketing campaigns that have leveraged earned and social media.

Contractor Preferences, but not requirements

1. Understanding of government regulation process, California political environment, and procedures.

2. Additional points will be given to firms that utilize teams with professionals representing WMDVBE businesses, small business and disadvantaged small businesses.

H. Key Dates

The following is a preliminary schedule of planned milestones. This schedule is subject to change by the CCSE as required and without notice:

- RFP Released December 6, 2013
- Deadline for Bidders to submit questions December 13 2013
- Answers to Bidder questions posted energycenter.org December 17, 2013
- Intent to Submit from Bidders December 20, 2013
- Proposals due January 17, 2014
- Selection of top Bidder(s) January 28, 2014
- Interviews February 4-6, 2014
- Contract Extended February 10, 2014

2. TASKS TO BE DELIVERED BY CONTRACTOR

Task 1: Implement an earned and social media campaign that supports and complements the Energy Upgrade California Marketing Plan

Objective: Implement a comprehensive ***earned and social media campaign*** in general and ethnic markets which will include, but not be limited to, news releases and media events, desk side visits, opinion and editorial coverage, radio and television talk show appearances, public service announcements, social media or other activities recommended by Contractor.

Deliverables:

1. Develop and finalize an integrated earned and social media campaign plan that includes the launch of the Energy Upgrade California as the new Statewide Marketing and Outreach (SW M&O) Program and a coordinated partner communications plans. The earned and social media campaign plan will include but not limited to the following:
 - a. Earned and social media plan
 - i. Development of an integrated earned and social media plan including measurable objectives, strategies and tactics.
 - ii. Identification of local, state and national reporters and bloggers – in print, TV, radio and online/social media (including multilingual).
 - iii. Correlate reporters, bloggers and media outlets demographics with Energy Upgrade California’s identified segmented audiences.

- iv. Identification of key events and opportunities to increase the awareness of Energy Upgrade California.
- v. Identification of key California influencers with whom to partner on various campaigns and stories.
- vi. Message/story development.
- b. Budget & Timeline
 - i. Budgets: target costs for implementing plan
 - ii. Implementation plan with timing and responsibilities
- c. Controls and Monitoring
 - i. Evaluation plan: purpose a series of key performance indicators to be used to measure the success of the campaign
 - ii. Monthly reports: progress and results on earned media activities and key performance indicators with detailed supporting data
- 2. Development of press materials – press kits, fact sheets, backgrounders, photographs, videos and B-Roll
- 3. Assist with the coordination of press conference and/or speaking engagements for SW MEO key stakeholders

Task 2: Measurement and Evaluation

Objective: Evaluate success of earned and social media campaign in terms of earned and social media metrics and behavioral metrics; compare results against baseline and provide ROI and impact evaluation and recommendations for improvement.

Deliverables:

1. Evaluation and measurement of KPIs identified and agreed upon in the campaign plan. These KPIs can be a combination of several tactics such as Advertising Value Equivalent (AVE), measuring editorial impact, earned media placement, or others systems suggested by the Contractor and agreed upon by CCSE.
2. Work with evaluation contractors to develop system for data collection and maintenance of earned media exposure and materials that are needed for independent program evaluation.
3. Provide a dashboard of KPIs to show progress for regularly scheduled meetings.

Task 3: Energy Upgrade California Website

Objective: Collaborate with website and marketing vendor to collaborate on content including content related to PR push and plan, and to align the messaging and editorial style on the campaign’s website.

3. BACKGROUND AND CALIFORNIA STATE GOALS

A. California Energy Efficiency Strategic Plan, GHG Reduction Goals and Clean Energy Goals

CPUC adopted a Long Term Energy Efficiency Strategic Plan (CEESP) in September 2008. The CEESP sets forth a roadmap for energy efficiency in California through the year 2020 and beyond. It articulates a long-term vision and specific goals for each major economic sector and in major cross-cutting areas such as Marketing Education and Outreach (ME&O).

The CEESP calls for all new homes to be zero net energy (ZNE) by 2020, for all existing homes to use 40% less energy than they did in 2008 and for all existing commercial buildings to use 30% less energy with new commercial buildings to be ZNE by 2030.¹ These energy goals are important to reduce ratepayer costs, lessen environmental impacts, decrease demand on the grid, and support California’s overarching objective to reduce greenhouse gas emissions to 1990 levels by 2020, as mandated by AB 32 (2006).² In addition to these goals, the state has a Renewable Portfolio Standard (RPS) program that requires investor-owned utilities, electric service providers, and community choice aggregators to increase procurement from eligible renewable energy resources to 33% of total procurement by 2020.³ On April 12, 2011, Governor Brown signed SBX1 2, requiring that one-third of the state’s electricity come from distributed renewable sources by December 31, 2020.

B. Integrated Energy Management

California has committed to integrated demand-side management (IDSM) as the preferred means of engaging residential and small business consumers in energy management—moving the market beyond single-widget solutions such as replacing light bulbs and seeking to engage people in multiple ways to improve their energy management and save energy at the right time and with the right tools.⁴ The CPUC is currently developing a roadmap to achieve zero net energy (ZNE) in residential and commercial new construction and the Energy Commission is busy developing a comprehensive energy efficiency program for residential and commercial existing buildings as mandated by AB 758 in 2009.⁵

¹ California Energy Efficiency Strategic Plan (CEESP), page 6, January 2011.

² California Air Resources Board: <http://www.arb.ca.gov/cc/ab32/ab32.htm>

³ CPUC: <http://www.cpuc.ca.gov/PUC/energy/Renewables/index.htm>

⁴ CEESP – Section 8, page 69

⁵ <http://www.energy.ca.gov/ab758/>

C. Background: Energy Upgrade California, Statewide Marketing, Education & Outreach

California's state agencies recognize that they must engage Californians as "partners in the state's energy efficiency, demand-side management and clean energy efforts."⁶ This idea has its roots in the electricity crisis of 2000-2001, when regulators turned to consumers in order to reduce demand on the grid through the Flex Your Power (FYP) campaign. Later, FYP was extended to include energy efficiency. After the CPUC evaluation of the 2006-2008 energy efficiency program portfolio, including an in-depth examination of FYP, the CPUC determined that a new campaign was needed—one that would more holistically encompass the various energy management program offerings now available to Californians. This marked the end of FYP as the statewide marketing campaign although "Flex Alerts" currently remain the state's platform for broadcasting urgent calls for electricity reduction when system peak nears maximum capacity.

In October 2010, Engage 360 was launched as the state's comprehensive demand-side management brand. Engage 360 was designed to create a movement around energy management as a lifestyle. Just a few months later, in March 2011, California launched the nation's largest home performance program, funded in part by the American Recovery and Reinvestment Act (ARRA) and ratepayers, and carrying the brand Energy Upgrade California, which was developed under leadership by the Energy Commission to address both residential and commercial comprehensive energy improvements.

The Energy Commission authorized about \$22 million in ARRA funds on statewide marketing, education and outreach to support Energy Upgrade California in 2011 and 2012. The IOUs, local governments, municipal utilities and other market participants supplemented this effort with related program funds, including funding from the Department of Energy's Better Buildings Neighborhood program under the leadership of Los Angeles County.

Marketing activities related to Energy Upgrade California were highly decentralized, with local governments, utilities and community-based organizations executing local Energy Upgrade California marketing campaigns, each with a somewhat different whole house program "product" that varied by region. The Energy Commission provided statewide website, radio, earned and social media, and advertising in the state's two largest media markets. Local program implementers placed ads in local papers, online and through radio stations and television. Local government teams also provided comprehensive workshops, mobile displays, neighborhood events and door-to-door canvassing.

The momentum of local government and community support for Energy Upgrade California and their related contributions to the program marketing eclipsed Engage 360, which spent about \$12

⁶ CEESP – Section 10, page 79

million before being suspended by an Assigned Commissioner Ruling. In October 2011,⁷ the CPUC directed that Engage 360 activities be halted and subsequently determined that statewide marketing, education and outreach for all residential and small business demand-side program offerings would continue under one umbrella brand; Energy Upgrade California.

D. Energy Upgrade California 2013-2014 Program Cycle

CPUC Decision (D. 12-05-015) directs that during the 2013-2014 transition program cycle, Energy Upgrade California will transition to serve as the primary statewide campaign to educate residential and small business customers about energy management concepts and programs that can help them better manage their energy use. This expanded mandate for the brand enables the state to be more comprehensive in its engagement of residential and small business consumers and to communicate a wider range of interrelated actions available to them that will both reduce their utility bills and help the state meet its short- and long-term energy goals.

The CPUC has stated that the brand “must also continue to build its usefulness in prompting home and building owners to take immediate steps to achieve deep energy retrofits”⁸ and also directs that “the messages that come under the Energy Upgrade California umbrella should not be limited to energy efficiency and should also include generalized energy education and awareness, such as information related to demand response, dynamic rate options, enabling technologies, climate change impacts, the Energy Savings Assistance Program (low-income energy efficiency program), distributed generation investment, smart grid upgrades and any other general impacts of energy use for individuals or for the state as a whole.”⁹

With this direction, Energy Upgrade California will now become the brand enabling Californians to discover the important role energy plays in their lives and give them reasons and opportunities to make meaningful, lasting changes in their energy use through simple everyday decisions.

⁷ October 13, 2011. Assigned Commissioner’s Ruling Regarding Statewide Marketing and Outreach Program.

⁸ Decision 12-05-015, pg. 301

⁹ Decision 12-05-015, pg. 300

E. Key Documents to Better Understand the Energy Upgrade California SW ME&O Initiative

To better understand the current approach to the SW ME&O campaign, it is recommended that Bidders read the following documents. The following documents can be downloaded at www.energycenter.org/2013-Earned-and-Social-Media-RFP

1. 2013-14 Energy Upgrade California Marketing Plan
 - a. Provides information on the future marketing efforts for Energy Upgrade California.
2. Brand Assessment Report
 - a. A detailed background on how the Energy Upgrade California brand is perceived among California residents.
3. Preliminary Message Concept Report
 - a. A recent study that provides information on what messages resonate with segmented audiences.
4. 2011-12 General Households Population Study in California
 - a. A recent study that provides information on California's population and updated information on the five segment groups used for Energy Upgrade California.
5. 2009 Opinion Dynamics Corporation (ODC) Segmentation Report
 - a. A detailed report outlining the characteristics of the five-segmented groups targeted for Energy Upgrade California.

F. ENERGY UPGRADE CALIFORNIA GOALS

Long term goal

Californians understand the value (personal and societal benefits included) of energy efficiency, demand response, and distributed generation, which leads to demand for products, services and rates for their homes and businesses that enable them to save money, use renewable energy, use energy more efficiently, and shift their energy use away from peak hours as needed. (Modified from the Strategic Plan Goal Results p. 80)

2013-2014 GOAL

Energy Upgrade California has been re-launched as an integrated Statewide Marketing, Education and Outreach effort that provides California residents and small business owners with information about energy concepts, programs, services and rates so that Californians

- begin to understand their energy use, the opportunities available for them to act, and the benefits of their action, and
- begin to take well informed action to better manage energy

4. REQUIREMENTS FOR PROPOSAL RESPONSE

All proposals must contain all of the following elements:

Item A. Work to be Performed

1. Approach to Scope of Work: Discuss your approach to the work described in each task.
2. Identification of deliverables and milestones with dates assigned.

Item B. Bidder's Capabilities and Experience

1. **Overall Project Experience and Results:** The Bidder shall discuss their company's past experience in implementing successful professional services with similar breadth, scope, and technical skill set. For each experience discussed, please indicate performance goals and results. Please include at least one project example where the project team had to adjust based on market data or feedback including how the team monitored this and responded
2. **Work Style/Culture:** Demonstrate your expertise in the following areas: a) collaboration, b) consensus-building across multiple players, government, business and community organizations, c) accountability, d) cost-containment. Please also include why you want this assignment and why your team is uniquely qualified to deliver the fresh strategy, and insights that will make this effort successful.
3. **Case Studies:** Provide three earned media case studies your firm has designed and implemented that best reflect your work and relevancy to this project. Describe the role your firm played in each project. Include the following content:
 - a) Name of product, service or issue
 - b) Key problem the media/outreach idea had to address
 - c) Executional elements
 - d) Evaluation process
 - e) Market results and assessment versus original projection
 - f) Key insight as to what made this idea so successful/remarkable
 - g) Behavior modification resulting in desired action not just awareness success
4. **References:** The Bidder shall provide three (3) client references including company name, contact information (name, title, phone number, fax, and email), and a brief description of Bidder's work for reference and how it relates to work that Bidder proposes.
5. **Supplier Responsibility Programs:** Per CPUC General Order 156, Bidders must supply information on their WMDVBE status and subcontracting plans. CCSE will consider this information in evaluating bids. CCSE encourages bidders certified WMDVBE by the Supplier Clearinghouse (<http://www.suppliernetwork.net/>) and/or Small Business by the Office of Small Business and DVBE Services (OSDS) (<http://www.dgs.ca.gov/pd/Programs/OSDS.aspx>) to submit

responses to this RFP. Non-WMDVBE and non-small business bidders are strongly encouraged to include WMDVBE and small business firms on their proposal teams. Proposals that include WMDVBE or small business firms may receive up to five (5) points in proposal scoring.

6. **Company Profile:** Provide a company profile (including subcontractors), length of time in business and core competencies.
 7. **Business model:** Explain your business model and briefly describe your firm's project management process.
 8. **Company Revenue:** Percent of total revenue derived from earned media, social media, marketing, and other business ventures. Please discuss any planned IPOs, mergers or acquisitions, hardware/software vendor partnerships.
 9. **Service Agreement:** Explain your service level agreement (SLA) structure.
 10. **Time frame for completion.** The time frame for completion of the project will be evaluated. In addition, time frames will be part of the purchase order.
 - a) Launching and maintaining an earned/social media campaign with associated results.
 - b) Demonstrated results utilizing a fully integrated campaign across multiple channels and languages, to effectively reach diverse audiences, preferably within California.
 - c) Provide samples for all media and materials developed and utilized in case studies. (bidder's may provide either hard copy and/or a URL with samples)
- C. Work Style/Culture:** Demonstrate your expertise in the following areas:
- a) Collaboration – experience with other groups or external entities to achieve the desired goals.
 - b) Consensus – gaining buy-in across multiple players, governments, business and community organizations.
 - c) Accountability – describe methods that are in place to ensure accountability.
 - d) Cost-containment – talk about your ability to contain costs while achieving goals.
 - e) Quality Control – discuss in detail the quality control standards in place and the process that ensures the controls are followed.

Item C. Staffing Plan

1. Provide your companies qualifications for this assignment.
2. Provide a staffing chart.
3. Identify key personnel, position title, their primary responsibilities per task (please include resumes), their relevant experience and resume/bio.

Item D. Budget:

Budget and professional fee schedule for the Contactor and the key personnel should include overhead and contingency rates as percentage share of overall budget. The total project budget has not been confirmed and is estimated to be \$1.5 million. The budget and funding for this contract is contingent upon authorization in a pending CPUC Decision. The budget will be based on a time and materials payment structure and the term of the contract will be determined based on the timing of the SWME&O initiative in the final CPUC decision. Bidders should prepare budgets that utilize best practices in public relations with the overall goal to maximize the budget investment through innovative approaches to creative development, account management, story/feature pitching and evaluation. Budgets will be evaluated on overall prudent management of budget expenditures.

A budgetary spreadsheet will be provided to Bidders to be used in the proposal submission. Bids must include this worksheet completed in full in order to be considered.

5. BIDDERS RESPONSE INFORMATION

All proposals should include the following:

A. COMPANY INFORMATION

1. Name of the organization or individual proposing the Work.
2. Main contact name, address, phone number, email, etc.
3. Number of employees.

B. FINANCIAL DATA

Adequate financial background information must be supplied as a prerequisite to doing business. In addition to the information below, please also provide a recent audited financial statement.

1. Form of Ownership:

Proprietorship _____ Partnership _____

Corporation _____ Date of Incorporation _____ State _____

2. Is your company traded on a Stock Exchange? Yes _____ No _____

If so, on which of the following: New York _____ NASDAQ _____

American _____ OTC _____ Other _____

3. Is your company Dunn and Bradstreet rated? Yes _____ No _____

If yes, what is the current rating? _____

4. If your company is not Dunn and Bradstreet rated, is there any other commercial rating that applies to your business (i.e. Thomas)?

Please specify and supply current rating _____

5. Has your company ever filed for bankruptcy? Yes _____ No _____ If so, when? _____

6. Current Ratio = Current Assets/Current Liabilities _____% for Year: _____

7. Operating Profit = Operating Profit/Sales _____% for Year: _____

8. Net Worth of Company \$_____

9. What percentage business would this Program represent? _____%

10. Banking References:

11. Is your company in the act of or in process of any litigation? Please briefly describe.

C. CLIENTELE

1. List Top 10 US clients (based on billings):
2. List Top 10 California based clients (based on billings) for earned/social media services only:
3. List Primary office's and largest satellite account gains over the past three years. Primary office is defined as the main office that will be handling the Energy Upgrade California Campaign account if selected.
4. List Primary office and largest satellite account losses over the past three years. Primary office is defined as the main office that will be handling the Energy Upgrade California Campaign account if selected.

5. List the consumer categories or product lines that cannot be accepted at this time due to conflict restrictions.

D. BILLINGS

1. Total billing for 2010, 2011, 2012 and forecast 2013.
2. Chart and list total U.S., Los Angeles, and San Francisco billings, separately, for the past three years including an estimate for the current year. (If neither LA nor SF serves as a primary location, please use information for your largest office. Specify the location)
3. Identify the number of clients the Los Angeles office handles in the following billing ranges:
 - a. Under \$5MM
 - b. \$5-15MM
 - c. \$15-50MM
 - d. \$50-100MM
 - e. \$100MM+
4. Identify the number of clients the San Francisco office handles in the following billing ranges:
 - A. Under \$5MM
 - B. \$5-15MM
 - C. \$15-50MM
 - D. \$50-100MM
 - E. \$100MM+

E. Organization

1. Describe how earned media operation of the satellite office is currently organized and list the names of current senior supervisors. Please provide an organizational chart.
2. Please advise if you plan to work with any 3rd parties and provide information on any such companies. Please describe type of work that has been performed in the past for your organization.

F. PRIMARY OFFICE EXPERIENCE

1. Please state the location of your primary office and answer questions below.
2. Provide brief biographies of key management executives' work experience.
3. Briefly describe the office's capabilities.

G. RELEVANT EXPERIENCE

1. List and describe the office's experience with energy efficiency, renewable energy environmental sustainability initiatives, state programs, utility industry or understanding of government regulation (CPUC).
2. Staff experience by title with a relevant earned media marketing experience. Please include description of expertise: planning, story development, pitching, interviewing, etc.

H. STRATEGIC INSIGHTS

1. From your perspective, how has the California local media marketplace changed within the last year or two? Please describe the impact it has had on your company, including issues and challenges your company faced, and how you were able to address them?
2. How will these changes impact Energy/Utilities/Statewide marketing and how do we take advantage of these changes?
3. Please share any key insights between the Northern and Southern California and coastal and inland California marketplaces.
4. This campaign must both build a social marketing brand and also motivate action by a broad range of people. That action will often involve going to other parties such as utilities or retailers. What must the campaign do to best meet these twin goals? What must it not do?
5. From your perspective, what are some other factors critical to statewide earned media success that we have not attempted to capture in this initial round and would clearly stand out as key differentiators.

I. REPORTING

1. Do you have media tools and reporting processes in place that would track all earned media activities?

Example for Collection

- a. Name of campaign
- b. Name of media outlet
- c. Demographic
- d. Date
- e. No. of impressions

Please describe the client/agency relationship strategic management process and performance report card?

J. STAFFING PLAN

1. Provide your company qualifications for this assignment.
2. Provide a staffing chart.
3. Identification of key personnel, position title, their primary responsibilities per task (please include resumes), and their relevant experience.
4. Proposed hourly rate by staff category. Bidders are required to fill in the information listed in Table 3.2 which includes a list of positions, responsibilities, and fully burdened hourly rate for each position.

Table 3.2 Hourly Rates

Staffing Direct Labor	Responsibility	Proposed Hourly Rate (\$)
[Position Title #1]		
[Position Title #2]		
[Position Title ##]		

6. EVALUATION CRITERIA

See Earned/Social Media Agency RFP Proposal Scoring Table Attachment and Earned/Social Media Agency RFP - Screening and Evaluation Attachment for details.

7. SUBMISSION OF PROPOSAL

Bidders must provide their proposals as requested in this RFP. Bidders are requested to submit an electronic version of their proposal in MS Word or PDF format and emailed to jeff.blanton@energycenter.org with the subject line clearly marked "SW ME&O EARNED/SOCIAL MEDIA AGENCY PROPOSAL" **no later than 11:59 p.m., January 17, 2014**. Bids received after this time will not be considered. Do not submit physical items, such as collateral or flash drives containing application materials, unless requested by CCSE in writing.

A. Questions

Please direct all communications via email, including any commercial/technical questions to Jeff Blanton, Brand Steward, Energy Upgrade California (jeff.blanton@energycenter.org) by December 13, 2013. Answers to these questions will be shared by CCSE to all potential bidders and will be posted on the RFP's landing page by December 17, 2013. CCSE will not respond to individual Bidders' questions.

B. Bidder Inquires and Concerns

All Bidder inquiries and concerns related to the solicitation process, commercial and contractual terms, or the contract/purchase order shall be directed to jeff.blanton@energycenter.org

C. Verification of Receipt of Proposal

It is the Bidder's sole responsibility to ensure that its proposal is received by the online webpage specified in this RFP by the deadline for submission.

D. Errors or Omissions

Any Bidder that discovers an error or omission in its proposal may withdraw that package and resubmit one, provided that it does so before the deadline for submission.

E. RFP Withdrawal

CCSE makes no guarantee that a contract award shall result from this RFP. CCSE reserves the right at any time, in its sole discretion, to abandon this RFP process, change any dates specified in this RFP, change the basis for evaluation of bids, terminate further participation in this process by any Contractor, accept any bid or enter into any definitive agreement, evaluate or reevaluate the qualifications of any bidding Contractor or the terms and conditions of any bid, change any form, document, term or condition used in this RFP, or reject any or all bids, all without notice and without assigning any reasons and without liability of CCSE or any of its subsidiaries, affiliates, or representatives to any bidding Contractor. CCSE shall have no obligation to consider any bid.

F. Proposal Preparation Costs

Bidders will not be reimbursed for any expenses related to this RFP under any circumstances,

regardless of whether the bidding process proceeds to a successful conclusion or is abandoned. CCSE shall not be deemed to have accepted any bid, and shall not be bound by any term thereof, unless and until an authorized representative of CCSE executes a definitive agreement with the winning Bidder. This RFP does not commit CCSE to reimburse respondents for any costs incurred in preparing and submitting a proposal including, but not limited to, costs associated with the Bidder's travel expenses to attend any pre-proposal conferences, oral presentations, long distance charges, negotiation sessions or making necessary studies and designs or samples in preparation of a response. In addition, no Bidder awarded a contract as a result of this RFP may charge these costs back to CCSE at any time.

G. Terms and Conditions

By submitting a proposal pursuant to this RFP, the Contractor acknowledges and agrees that it has received the RFP; it is fully bound by the terms and conditions of the RFP in submitting its bid in response to the RFP; it sought independent legal and financial advice of its own choosing with respect to the RFP and its proposal if desired; it obtained all necessary authorizations, approvals and waivers, if any, required by it as a condition of submitting its proposal, and, if its proposal is selected, such proposal shall be subject to the terms and conditions of this RFP.

Contractor, by submission of their proposal warrant that Contractor is: submitting its proposal subject to all applicable laws; not engaging and will not engage in communications with any other bidder in the RFP concerning the price terms contained in its proposal and has not engaged in collusion or other unlawful or unfair business practices in connection with this RFP. Contractor's proposal is binding, subject only to CCSE's acceptance in CCSE's sole discretion with CCSE's satisfaction or waiver of any conditions precedent or subsequent, to the agreement that may be entered into with CCS. Any breach by Contractor of the foregoing covenants, representations and warranties is, in addition to any other remedies that may be available to CCSE under applicable law, grounds for immediate disqualification of such bidding Contractor, and, depending on the nature of the breach, may also be grounds for terminating the RFP in its entirety.

H. Indemnification

To the fullest extent allowable by law, Bidder will defend, indemnify and hold harmless CCSE, its Board of Directors, members, officers, agents, employees and directors (hereinafter "Indemnified Parties") from and against any claim, demand, loss or liability (hereinafter "Claim") of any nature or cause whatsoever, and whether actual or alleged, arising from or in any way connected with the performance of this RFP, including, but not limited to, any Claim for personal injury, death, property damage, loss of profits, infringement upon intellectual property rights, failure to comply with all of the requirements contained in this RFP and disclosure of confidential information which might be obtained by Bidder during performance of this Agreement; except where such Claim is caused by the sole negligence or willful misconduct of the Indemnified Parties.

If any action or proceeding, whether judicial, administrative, arbitration or otherwise, shall be commenced on account of any Claim covered by this, and such action or proceeding names any of

the Indemnified Parties as a party thereto, the Bidder shall, at its sole cost and expense, defend the Indemnified Parties in such action or proceeding.

In the event that there shall be any judgment, award, ruling, settlement, or other relief arising out of any such action or proceeding to which any of the Indemnified Parties are bound by, Bidder shall pay, satisfy or otherwise discharge any such judgment, award, ruling, settlement or relief and shall indemnify and hold harmless the Indemnified Parties from any and all liability or responsibility arising out of any such judgment, award, ruling, settlement or relief.

I. Proposal Review - Clarifications

CCSE may, but shall not be obligated to perform clarification interviews or request clarifications in writing. A clarification interview may be performed via telephone and will focus on clarifying the information set forth in the proposals, rather than offering Bidders the opportunity to revise its proposal. Bidders will not be compensated for the time spent or the costs incurred for the interview(s) or for responding to a written request for clarification.

J. Permits, Licenses or Certifications

If any permits, licenses, and/or certifications are required by any legal or governing body for the performance of the contract, said permit, license and/or certificate shall be secured and paid for by the Bidder. If required for the performance of contract work, a current copy of said permit, license, and/or certificate must be submitted at the time this contract is executed. Permit, license and/or certificate numbers shall be recorded on all invoices presented to CCSE for payment. Bidder shall give all required notices and comply with all laws, ordinances, rules and regulations bearing on the conduct of the work as specified.

K. CCSE Rights

CCSE reserves the right to investigate the references and past performance of any Bidders regarding compliance with specifications, completion or delivery on schedule, and lawful payment of suppliers, sub-contractors, and workers prior to any contract award. CCSE also reserves the following rights:

1. Reject any or all of the proposals.
2. Issue subsequent RFPs.
3. Cancel the entire RFP.
4. Amend any part of the RFP process by addenda.
5. Appoint evaluation committees to review qualifications or proposals.
6. Seek the assistance of outside technical experts in qualification or proposal evaluation.
7. Require Bidders to clarify submittals and to submit additional information.
8. Meet with and interview Bidders or subcontractors.

9. Approve or disapprove the use of particular contractors or subcontractors.
10. Establish a short list of firms eligible for discussions.
11. Waive informalities and irregularities in the RFP.
12. The Company is under no obligation to respondents to provide specific details regarding the award decision.
13. Inquire of CCSE personnel and consultants regarding Bidder's past performance.

8. CONTRACT EXECUTION

It is CCSE's intent to execute an agreement with the successful Bidder to cover all approved activities through the term outlined in the SWME&O CPUC final decision. Bidder's proposal shall be valid for ninety (90) days after receipt. CCSE's failure to execute a contract within 90 days after receipt of Bidder's proposal may result in cancellation or extension of this RFP at CCSE's sole discretion.

9. CONSIDERATION OF PROPOSALS

Proposals in response to this RFP should be submitted on their own merit and not in combination with any other current or future consideration from the CCSE. Proposals must adhere to the guidelines and requirements set forth herein including, but not limited to, the format requested by CCSE. In order to be considered, all sections of the RFP must be completed. CCSE may request selected Bidders to provide oral presentations. CCSE reserves the right to accept or reject any or all proposals for any reason, and is under no obligation to disclose the reason for rejection. Furthermore, CCSE is under no obligation to procure or contract for the product or services discussed in this RFP.

A. Logo Use / Publicity

Contractors shall not, without CCSE's prior written consent, engage in advertising, promotion or publicity related to this RFP and possible agreement, or make public use of Energy Upgrade California or any CCSE, CPUC, ENERGY COMMISSION or IOU identification in any circumstances related to this RFP or otherwise. "Identification" means any corporate name, trade name, trademark, service mark, insignia, symbol, logo or any other product, service or organization designation, or any specification or drawing owned by CCSE or its affiliates or any representation thereof. CCSE shall approve or disapprove in writing any publicity, marketing, or public disclosure regarding this project before release by the successful Bidder.

B. Woman/Minority/Disabled Veteran-Owned Business, And Small Business

This contract is subject to California Public Utilities Commission General Order 156, a policy to promote the award of contracts in a manner that develops and strengthens qualified women, minority and disabled veteran business enterprises (WMDVBE). CCSE has fully integrated WMDVBEs into its pool of bidders for this and other SW ME&O solicitations and strongly

encourages all Bidders to do the same in fulfilling the work requirements of any Scope of Work. Businesses certified by the State of California as a WMDVBE or small business are strongly encouraged to submit responses to this RFP. Non-WMDVBE and non-small business bidders are strongly encouraged to develop creative initiatives to help foster new business relationships with WMDVBEs and small businesses within the primary industries affected by this RFP.

C. Confidentiality

CCSE cannot guarantee the contents of proposals will be kept confidential. Information provided in the proposal package will be made available to the CPUC and may be made available to the public upon request. Contractors should not submit any information containing their or any third party's trade secrets or other proprietary or confidential information (as defined in California's Uniform Trade Secrets Act or otherwise) ("Trade Secrets"). CCSE may enter into mutual nondisclosure agreements more extensive than this Confidentiality Notice with Contractors selected for further participation in transactions which are the subject matter of this RFP, but is not agreeing to such an arrangement at this time and will infer that, other than price quotes, information which is submitted is not a Trade Secret of the Contractor or any third party. CCSE will make reasonable efforts to protect any information clearly indicated as confidential by Bidders. This award is ratepayer-funded and any information submitted or generated is subject to public disclosure requirements. Confidential information shared with the Contractor will be subject to the Contractor entering into Non-Disclosure Agreements (NDAs).