

**REQUEST FOR PROPOSAL 18 - 01  
MARKETING AND OUTREACH SERVICES**

The Los Angeles Community Choice Energy (LACCE) Authority is issuing this Request for Proposal (RFP) to solicit proposals for a contract for marketing and outreach services. These services will support the LACCE Authority's Board of Directors, Executive Director, and staff in outreach efforts to existing and potential customers of the LACCE Community Choice Aggregation (CCA) program. LACCE will conduct evaluations of firms or individuals through this RFP, and plans to negotiate and execute an agreement with the selected proposer.

**Up to \$200,000 is available for the contract resulting from this RFP. The contract is expected to begin March 2018 and run for one year, with the possibility to extend for one year. NOTE: key deliverables are due as early as April 2018.**

**The contractor must have skills and experience in creating effective multimedia communications tools to share information with stakeholders and the public. The contractor, working in collaboration and consultation with the LACCE team, will complete tasks including but not limited to: program branding, logo development, web/social design + build, customer segmentation, media relations, and a full marketing campaign including customer notification and engagement. Successful proposers will tailor marketing materials to LACCE's diverse audience. See Anticipated SOW (Exhibit B, Section III) for more information.**

**What Is LACCE?**

Los Angeles Community Choice Energy (LACCE) is the temporary name for a regional Community Choice Aggregation program in Los Angeles County. Community Choice Aggregation (CCA) allows local governments to purchase electricity in the wholesale power market and sell it to their residents and businesses at competitive rates as an alternative to electricity provided by Southern California Edison. CCA benefits can include local control over energy mix - meet or exceed Renewable Portfolio Standard (RPS) and Climate Action Plan goals; consumer choice - competition for lower rates and options for cleaner energy; and create local jobs and renewable generation assets and programs. <http://lacee.org/> for more information.

**1. Timetable**

The timetable for this RFP is as follows:

Release of RFP .....	01/05/2018
Written Questions Due.....	01/19/2018
Answers Released .....	01/26/2018
<b>Proposals Due (5:00 pm Pacific Standard Time) .....</b>	<b>02/01/2018</b>

**2. Proposer Questions**

Proposers may submit questions regarding this RFP by email to Ellen Dux at [edux@lacee.org](mailto:edux@lacee.org). All questions must be received by 5:00pm Pacific Time on January 19, 2018. When submitting questions, please specify which section of the RFP you are referencing and quote the language

that prompted the question. LACCE reserves the right to group similar questions when providing answers. Questions may address issues and concerns that the evaluation criteria and/or business requirements could unfairly disadvantage proposers or, due to unclear instructions, may result in LACCE not receiving the best possible responses from proposer.

### **3. Proposal Submission**

The final proposal should be submitted by email to Ellen Dux at [edux@lacce.org](mailto:edux@lacce.org) by 5:00 pm Pacific Time on February 1, 2018. Please include the subject line "PROPOSAL FOR MARKETING AND OUTREACH SERVICES."

It is the sole responsibility of the submitting proposer to ensure that its proposal is received before the submission deadline. Submitting proposers shall bear all risks associated with delays in delivery. Any submissions received after the scheduled closing date and time for receipt of submissions will not be accepted.

The submitted proposal shall be no greater than 30 pages, 8 ½ x 11" size (references provided via the forms in Attachments C-E, as well as work samples, will not be counted against this page limit).

### **4. Proposal Evaluation and Criteria**

False, misleading, incomplete, or deceptively unresponsive statements in connection with a proposal shall be sufficient cause for rejection of the proposal. The evaluation and determination in this area shall be at LACCE's sole judgment and this judgment shall be final. Proposals will be evaluated using the following criteria:

- *Proposer's Qualifications*

Proposer will be evaluated on their experience and capacity as a corporation or other entity to perform the required services based on information provided in the proposal. Criteria include operational experience of the proposer's organization and of key personnel, number of times the firm has provided similar services, years of experience, and experience providing these services in California.

- *References*

Proposer will be evaluated on the verification of references in the proposal. This review may result in point deductions up to one hundred percent (100%) of the total points awarded in this evaluation category. Additionally, a review of terminated contracts will be conducted which may result in point deductions.

- *Proposers Approach to Providing Required Services and References*

The proposer will be evaluated on its description of the methodology to be used to meet LACCE's requirements based on information provided in the proposal.

- *Cost Proposal*

The maximum number of points will be awarded to the proposal whose cost best meets the needs of LACCE.

- *Exceptions to the Requirements of the Statement of Work*

Proposer will be evaluated on their willingness to accept the Statement of Work (SOW) (Attachment B). LACCE may deduct rating points or disqualify the proposal in its entirety if the exceptions are material enough to deem the proposal non-responsive. Proposers are further notified that LACCE may disqualify any proposer with whom LACCE cannot satisfactorily negotiate a contract.

## **5. Selection Process**

LACCE reserves the sole right to judge the contents of the proposals submitted pursuant to this RFP and to review, evaluate and select the successful proposal. The selection process will begin immediately following the submission deadline.

Evaluation of the proposals will be conducted by LACCE staff. Staff will evaluate the proposals and select a prospective contractor. All proposals will be evaluated based on the criteria listed in this RFP.

After a prospective firm has been selected, LACCE staff and the prospective firm will negotiate a contract for execution by LACCE. If a satisfactory contract cannot be negotiated, LACCE may, at its sole discretion, begin contract negotiations with the next qualified firm who submitted a proposal, as determined by LACCE.

LACCE retains the right to select a proposal other than the proposal receiving the highest number of points if LACCE determines, in its sole discretion, another proposal is the most overall qualified, cost-effective, responsive, responsible and/or in the best interests of LACCE. After the contract has been executed with the selected proposer, all other proposers will be notified.

## **6. Additional Information**

This RFP is a solicitation for proposals only, and is not intended as an offer to enter into a contract. LACCE may, at its sole discretion, reject any or all proposals submitted in response to this RFP or may, in its sole discretion, reject all responses and cancel this RFP in its entirety. LACCE shall not be liable for any costs incurred by the proposer in connection with the preparation and submission of any proposal. LACCE reserves the right to waive inconsequential disparities in a submitted proposal. LACCE has the right to amend the RFP by written addendum. LACCE is responsible only for that which is expressly stated in the solicitation document and any authorized written addenda. Such addendum shall be made available to each person or organization which LACCE records indicate has received this RFP. Should such

addendum require additional information not previously requested, failure to address the requirements of such addendum may result in the proposal being found non-responsive and not being considered, as determined in the sole discretion of LACCE. LACCE is not responsible for and shall not be bound by any representations otherwise made by any individual acting or purporting to act on its behalf.

Responses to this solicitation shall become the exclusive property of LACCE. The recommended proposer's proposal will become a matter of public record when contract negotiations are complete and LACCE receives a letter from the recommended proposer's authorized officer that the negotiated contract is a firm offer of the recommended proposer. All proposals will become a matter of public record when an agreement is executed by LACCE. Exceptions to disclosure are those parts or portions of all proposals that are justifiably defined as business or trade secrets, and plainly marked by the proposer as "Trade Secret", "Confidential", or "Proprietary". LACCE shall not, in any way, be liable or responsible for the disclosure of any such record or any parts thereof, if disclosure is required or permitted under the California Public Records Act or otherwise by law. In the event LACCE is required to defend an action on a Public Records Act request for any of the aforementioned documents, information, books, records, and/or contents of a proposal marked "Confidential", "Trade Secrets", or "Proprietary", proposer agrees to defend and indemnify LACCE from all costs and expenses, including reasonable attorneys' fees, incurred in connection with any action, proceedings, or liability arising in connection with the Public Records Act request.

All contact regarding this RFP or any matter relating thereto must be in writing and may be emailed to:

Ellen Dux  
edux@lacce.org

If it is discovered that a submitter contacted and received information from any LACCE personnel, other than the person specified above, regarding this solicitation, LACCE, in its sole determination, may disqualify their proposal from further consideration.

Thank you for your interest in doing business with LACCE.

Sincerely,  
LACCE Staff

#### **ATTACHMENTS**

- Attachment A – Format of the Proposal
- Attachment B – Statement of Work
- Attachment C – References
- Attachment D – List of Contracts
- Attachment E – List of Terminated Contracts

**ATTACHMENT A  
PROPOSAL FORMAT**

**Proposals must include all of the sections and subsections listed below:**

**I. Introduction and Executive Summary**

Briefly describe the proposer's firm, its organization, key personnel, and operations. Identify and provide similar information for any third parties that would be relied upon to provide the proposed services.

**II. Financial, Technical, and Operational Qualifications**

Demonstrate that the proposer's organization has the experience and capability to perform the required services. The following sections must be included:

**1. Proposer's Background and Operational Experience**

Demonstrate the proposer's qualifications and experience in providing the proposed services. Provide a summary of relevant background information to demonstrate that the proposer has the capability to perform the required services as a corporation or other entity. Provide specific information about projects of similar scope and scale to the LACCE program.

Provide background information including a resume or curriculum vitae for each key staff member that would be assigned to the project. Describe their roles on the project and the previous education and experience they have that would prepare them for these roles.

Proposals may include samples of marketing materials developed for similar campaigns including collateral and links to videos aimed at multiple audiences.

**2. Proposer's References**

It is the proposer's sole responsibility to ensure that the firm's name, and point of contact's name, title and phone number for each reference is accurate. The same references may be listed on both *Attachment C - References* and *Attachment D - List of Contracts*.

LACCE may disqualify a proposer as non-responsive and/or non-responsible if:

- a) References fail to substantiate proposer's description of the services provided; or

b) References fail to support that proposer has a continuing pattern of providing capable, productive and skilled personnel; or

c) LACCE is unable to reach the point of contact with reasonable effort. It is the proposer's responsibility to inform the point of contact of normal working hours.

The proposer must complete and include the following Required Forms:

a) *Attachment C* - Prospective Contractor References. Proposer must provide three (3) references where the same or similar scope of services was provided.

b) *Attachment D* - Prospective Contractor List of Contracts. The listing must include all Public Entities contracts for the last three (3) years. Use additional sheets if necessary.

c) *Attachment E* - Prospective Contractor List of Terminated Contracts. Listing must include contracts terminated within the past three (3) years with a reason for termination.

### **III. Proposer's Approach to Provide Required Services**

Present a description of proposer's approach to providing the services to LACCE. Describe in detail how the services will be performed to meet the requirements in the following Statement of Work (*Attachment B*).

### **IV. Acceptance of/or Exceptions to Requirements of the Statement of Work (SOW)**

It is the duty of every proposer to thoroughly review the Statement of Work to ensure compliance with all terms, conditions and requirements. It is LACCE's expectation that in submitting a proposal the proposers will accept, as stated, LACCE's requirements in the Statement of Work. However, the proposers are provided the opportunity to take exceptions to LACCE's requirements.

This section of proposer's response must include:

1. A statement offering the proposer's acceptance of or exceptions to all requirements listed in Attachment B - Statement of Work.

For each exception, the proposer shall provide:

- a) An explanation of the reason(s) for the exception;
- b) The proposed alternative language; and

c) A description of the impact, if any, to the proposer's price.

2. A proposed sample contract for the consideration of LACCE.

Indicate all exceptions to the Statement of Work by providing a 'red-lined' version of the language in question. LACCE relies on this procedure and any proposer who fails to make timely exceptions as required herein, may be barred, at LACCE's sole discretion, from later making such exceptions.

LACCE reserves the right to determine if proposers' exceptions are material enough to deem the proposal non-responsive and not subject to further evaluation.

LACCE reserves the right to make changes to the Statement of Work during negotiations with the selected proposer.

**V. Cost Proposal**

Proposers shall submit a cost proposal for the completion of the services in the Statement of Work. A detail of the hours by task plus billing rates is required. In addition, proposers are free to propose alternative pricing structures for the consideration of LACCE.

## **ATTACHMENT B STATEMENT OF WORK**

### **I. Background:**

Los Angeles Community Choice Energy (LACCE) Authority is the Community Choice Aggregation program formed between the County of Los Angeles and various cities within the County. Community Choice Aggregation (CCA) is a program that allows cities and counties to buy and/or generate electricity for residents and businesses within their areas. In addition to adding choice to the electricity market, lowering costs and increasing local control over energy, CCAs in California have been able to offer more renewable energy than currently offered by the incumbent utilities.

LACCE is planning to begin servicing customers in three phases throughout 2018-19. Phase 1 will include only Los Angeles County municipal buildings in the unincorporated areas. Phase 2 will serve all commercial and industrial customers of LACCE, and is expected to include an estimated 25,000 accounts. Phase 3 will serve all residential customers and will include an estimated 280,000 customers.

LACCE is governed by a Board of Directors made up of elected officials from member cities and counties. It should be noted that the LACCE Board will likely select a new name for the Authority in the first quarter of 2018 to be more reflective of its growing territory.

More information about LACCE can be found at [lacee.org](http://lacee.org).

### **II. Purpose and Objectives:**

The LACCE Authority is seeking proposers to provide a variety of marketing and outreach services to business and residential customers who will participate in LACCE's Community Choice Aggregation program. LACCE's service territory is large and diverse, both geographically and culturally. At the time of this RFP, 24 cities throughout Los Angeles and Ventura counties have elected to join LACCE, in addition to the unincorporated areas of both counties. More cities are expected to join throughout 2018.

A full marketing campaign will be conducted including customer notification and engagement. The campaign will seek to inform and educate customers about LACCE, and to prevent customers from opting out of the program. Successful proposers will tailor effective marketing and outreach to LACCE's diverse audience.

### **III. Anticipated Scope of Work**

Scope of work may include any or all of the following:

1. Communications and Outreach Plan
  - a. Develop and implement a comprehensive Communications and Outreach Plan (Plan) for Phases 2 & 3 of LACCE customer service rollout. This Plan will guide the work of the selected consultant as well as LACCE staff and will be adjusted as needed throughout the duration of the project.
  - b. Plan should outline robust yet cost effective media, marketing, outreach, and community engagement strategies to promote LACCE, and educate and build awareness of the benefits of CCAs among LA County's diverse residents and businesses. This Plan will include a timeline for implementation and key milestones.
  - c. Plan should be developed with the knowledge that the LACCE Board of Directors will likely select a new name for the Authority in the first quarter of 2018
  - d. Plan should include strategies for reaching out to linguistically and culturally diverse communities in LACCE service areas
  - e. Plan should be developed with the knowledge that LACCE is unique in its geographic composition, and that service territories are not geographically contiguous
  - f. Plan may include strategies for marketing to customers or eligible cities to encourage those cities to join LACCE
  - g. Phase 2 communications plan to be completed within 2-3 weeks of contract execution. Plan should be developed with the expectation that pre-notification outreach to Phase 2 customers will begin in February 2018.
2. Branding Guidelines & Communications Policy
  - a. Utilizing any existing logos and branding, assist LAACE in developing Branding Guidelines as a reference tool to maintain consistency of communications
  - b. Assist LACCE in developing a Communications Policy in accordance with LACCE values that will ensure effective communication for all targeted audiences, including translation requirements.
3. Understanding audience
  - a. Conduct research and activities, which may include but is not limited to focus groups, to understand audience and test out messaging
  - b. Identify key languages necessary for outreach
  - c. Understand segmentation of target audience
4. Messaging and Content
  - a. Develop content and messaging for LACCE to be used in the marketing campaign as well as routine communications, including information on LACCE's electricity options, programs, and rates. Content may be developed for, but is not limited to: press releases, website, radio, e-

- news, social media posts, print collateral, monthly e-newsletters, mandatory customer enrollment notices, and email campaigns
  - b. Target audiences include residential and business customers within LACCE service areas
  - c. Content will be delivered in English and Spanish, and potentially other identified languages
5. Customer Enrollment Process
- a. Develop and send four pieces of statutorily mandated customer direct mail to LACCE Phase 2 customers within the legally required timeframe.
6. Collateral and other Marketing materials
- a. Create marketing materials utilizing existing LACCE logo and branding and developed messaging. These materials may include but are not limited to: brochures, videos, print and digital advertising, e-newsletters, customer notices, posters, banners, flyers, and promotional items.
  - b. All collateral and marketing materials should be culturally appropriate and translated in accordance with the Communications Policy once it's developed.
  - c. Consultant may assist with integrating these materials to the LACCE website as needed by staff.
7. Community and Stakeholder Engagement
- a. Plan and assist staff with conducting direct outreach to large load business customers, community groups, labor organizations, environmental groups and other key stakeholder groups as part of coalition building strategy
  - b. Identify, plan, and execute opportunities to increase LACCE visibility and build community support such as community presentations, tabling at events, or event sponsorships
  - c. Plan and assist with facilitating any other events as directed by LACCE staff including community workshops, committee meetings, or other stakeholder gatherings
8. Media Relations
- a. In collaboration and with approval of LACCE staff, respond to media inquiries, write and distribute press releases, and pitch stories to all media outlets
  - b. Develop and maintain media list
  - c. Coordinate and negotiate media buys in accordance with Communications Plan and develop system to bill LACCE
9. Social Media
- a. Develop social media accounts for LACCE on relevant platforms, including but not limited to, Twitter, Facebook, and YouTube
  - b. Develop messages and maintain a strategic schedule for posting
  - c. Respond to user engagement across platforms
10. Digital Advertising

- a. Develop and implement a targeted digital advertising campaign to increase public awareness and drive traffic to LACCE website
- 11. Print Advertising
  - a. Develop and implement print advertising and content campaign including content for local government newsletters, regional and local newspapers, trade publications, and other press outlets
- 12. Performance Evaluation/Reporting/Data Collection
  - a. Work with LACCE staff to develop measurable goals and objectives for Communications and Outreach Plan
  - b. Develop a format for performance evaluation that will be generated by consultant and shared with LACCE staff and Board of Directors on a determined periodic basis
  - c. Develop a method of data collection to measure effectiveness of campaign strategies and messaging
- 13. Additional Services
  - a. Any marketing or outreach services related to LACCE that are identified as necessary during the course of the project, but are not including in the scope of work listed here, may be considered additional services. These services will be negotiated and consultant will not begin work on additional services until receipt of written notice of work order from LACCE staff.

**IV. Term Length:**

The anticipated term of the agreement would be one year from the date of execution. There may be an option to extend for one additional year.

**V. Additional Expectations:**

1. Selected consultant may be asked to work with the LACCE Community Advisory Committee as well as key community stakeholders to integrate stakeholder input in Communications Plan.
2. Selected consultant would be expected to research and integrate data and best practices from resources such as LACCE call center vendor and existing CCAs.
3. Available for occasional attendance at monthly LACCE Board of Directors meetings.
4. If subcontractors are required in order for the selected consultant to fulfill certain requirements of the Scope of Work, the selected consultant will manage all subcontractor relationships.

**VI. Desirable Qualifications:**

1. Experience and knowledge in the energy or environmental sector, including previous experience working with CCAs or similar public entities, is preferred but not required.

2. Experience developing and executing large scale, long term strategic plans of a similar nature to that described in the Scope of Work.
3. Experience in developing multi-cultural outreach strategies and campaigns directed at English and non-English speaking ***business and individual*** audiences.
4. Media relations experience including preparation of press releases, media advisories, press kits, media messaging, identifying media opportunities, developing media relationships and contact lists, and pitching news stories.
5. Capabilities for creative development of print materials such as brochures, newsletters, posters, signage, event displays, and advertisements.
6. Capabilities for creative development of digital media including videos, advertising, email and social media.
7. Knowledge and familiarity with Los Angeles County market.

**VII. Tentative Timeline of Events for Phase 2 Only (Phase 3 TBD):**

Date	Milestone
2/01/18 – 2/28/18	LACCE staff to conduct interviews and finalize contract with selected vendor
3/01/18	Begin Phase 2 work
4/01/18	Initial Phase 2 deliverable(s) due

# ATTACHMENT C

## PROSPECTIVE CONTRACTOR REFERENCES

Contractor's Name: \_\_\_\_\_

List five (5) references where the same or similar scope of services were provided in order to meet the Minimum Requirements stated in this solicitation.

<b>1. Name of Firm</b>	<b>Address of Firm</b>	<b>Contact Person</b>	<b>Telephone #</b> (   )	<b>Fax #</b> (   )
Name or Contract No.	# of Years / Term of Contract		Type of Service	Dollar Amt.
<b>2. Name of Firm</b>	<b>Address of Firm</b>	<b>Contact Person</b>	<b>Telephone #</b> (   )	<b>Fax #</b> (   )
Name or Contract No.	# of Years / Term of Contract		Type of Service	Dollar Amt.
<b>3. Name of Firm</b>	<b>Address of Firm</b>	<b>Contact Person</b>	<b>Telephone #</b> (   )	<b>Fax #</b> (   )
Name or Contract No.	# of Years / Term of Contract		Type of Service	Dollar Amt.

# ATTACHMENT D

## PROSPECTIVE CONTRACTOR LIST OF CONTRACTS

**Contractor's Name:** \_\_\_\_\_

List of all public entities for which the Contractor has provided service within the last three (3) years. Use additional sheets if necessary.

<b>1. Name of Firm</b>	<b>Address of Firm</b>	<b>Contact Person</b>	<b>Telephone #</b> ( )	<b>Fax #</b> ( )
Name or Contract No.	# of Years / Term of Contract		Type of Service	Dollar Amt.
<b>2. Name of Firm</b>	<b>Address of Firm</b>	<b>Contact Person</b>	<b>Telephone #</b> ( )	<b>Fax #</b> ( )
Name or Contract No.	# of Years / Term of Contract		Type of Service	Dollar Amt.
<b>3. Name of Firm</b>	<b>Address of Firm</b>	<b>Contact Person</b>	<b>Telephone #</b> ( )	<b>Fax #</b> ( )
Name or Contract No.	# of Years / Term of Contract		Type of Service	Dollar Amt.
<b>4. Name of Firm</b>	<b>Address of Firm</b>	<b>Contact Person</b>	<b>Telephone #</b> ( )	<b>Fax #</b> ( )
Name or Contract No.	# of Years / Term of Contract		Type of Service	Dollar Amt.
<b>5. Name of Firm</b>	<b>Address of Firm</b>	<b>Contact Person</b>	<b>Telephone #</b> ( )	<b>Fax #</b> ( )
Name or Contract No.	# of Years / Term of Contract		Type of Service	Dollar Amt.

# ATTACHMENT E

## PROSPECTIVE CONTRACTOR LIST OF TERMINATED CONTRACTS

**Contractor's Name:** \_\_\_\_\_

List of all contracts that have been terminated within the past three (3) years.

<b>1. Name of Firm</b>	<b>Address of Firm</b>	<b>Contact Person</b>	<b>Telephone #</b> (   )	<b>Fax #</b> (   )
Name or Contract No.		Reason for Termination:		
<b>2. Name of Firm</b>	<b>Address of Firm</b>	<b>Contact Person</b>	<b>Telephone #</b> (   )	<b>Fax #</b> (   )
Name or Contract No.		Reason for Termination:		
<b>3. Name of Firm</b>	<b>Address of Firm</b>	<b>Contact Person</b>	<b>Telephone #</b> (   )	<b>Fax #</b> (   )
Name or Contract No.		Reason for Termination:		
<b>4. Name of Firm</b>	<b>Address of Firm</b>	<b>Contact Person</b>	<b>Telephone #</b> (   )	<b>Fax #</b> (   )
Name or Contract No.		Reason for Termination:		