

Request for Proposals



for Media Buyer Services

Proposals Due July 6, 2020

BACKGROUND & CAMPAIGN OVERVIEW

Monterey Bay Community Power (MBCP) is a Community Choice Energy (CCE) agency established by local communities to source clean and renewable energy for Monterey, San Benito and Santa Cruz counties, as well as the cities of Morro Bay and San Luis Obispo. In January 2021, all electricity customers in the cities of Arroyo Grande, Carpinteria, Del Rey Oaks, Goleta, Guadalupe, Grover Beach, Paso Robles, Pismo Beach, Santa Maria and Solvang, as well as the County of Santa Barbara will be enrolled in MBCP service. While MBCP assumes the responsibility of determining *how* and *where* electricity is generated, PG&E and SCE continue its traditional role delivering power, maintaining electric infrastructure and billing. As a locally controlled public agency, MBCP is not taxpayer funded and supports regional economic vitality by sourcing clean energy at affordable rates and funding local energy programs.

Following CCE industry standards as well as guidelines set forth in AB 112, when a city or county forms or joins an existing CCE, all eligible electricity customers within the jurisdiction(s) are automatically enrolled with the CCE – in this case, MBCP – unless a customer chooses to opt-out and remain exclusively with PG&E. As part of enrollment, all CCEs are required to send four enrollment notifications to each enrolling customer (via email or postal mail); 60 and 30 days prior to enrollment, and 30 and 60 days after enrollment to alert them of the changes to electricity service.

As part of MBCP's commitment to inform businesses and residents within enrolling communities about the change to electricity service – how the CCE model works, what it means for them, what changes/stays the same, economic/environmental benefits, community benefits, etc – MBCP will launch an advertising and promotions campaign focused on education and awareness to assure that all businesses and residents make an informed decision about their electricity service. This campaign will kickoff prior to the first enrollment notifications going out and continue through the last round of notifications.

In addition to advertising needs to support enrollment, MBCP may utilize the Media Buyer to support promotion of Energy Programs. As program details and timelines are still being developed, MBCP reserves the right to decline Media Buyer services in support of energy programs and/or direct energy program advertising funds toward enrollment advertising.

Enrollment Advertising (October 2020 through March 2021 and August 2021 to December 2021):

The cities of Arroyo Grande, Carpinteria, Del Rey Oaks, Goleta, Guadalupe, Grover Beach, Paso Robles, Pismo Beach, Santa Maria and Solvang, as well as the County of Santa Barbara have elected MBCP to be their primary electricity provider; aggregating their combined electricity needs and sourcing it by determining how and where it is generated. PG&E and SCE continues its traditional role delivering power, maintaining electric infrastructure and billing. Beginning January 2021, all eligible electricity customers within these jurisdictions will be enrolled in MBCP's carbon-free electricity service offering, MBChoice, with no action required. In addition to cleaner energy at a lower cost, residents and businesses benefit from having a choice when it comes to an electricity provider, benefit from local control of electricity service and the opportunity to have a voice in the decision-making process, as well as benefiting from local energy

programs and community reinvestment. The geographic focus for Enrollment advertising will be limited to the enrolling communities listed above. Additionally, MBCP will be enrolling all eligible electricity customers in southern Santa Barbara County as early as February 2021 and as late as October 2021. Negotiations are currently underway for enrollment of southern Santa Barbara County and the deadline for final decision is October 1, 2020. Of important distinction regarding southern Santa Barbara County; this will be the only portion of MBCP service area where Southern California Edison (SCE) is the investor-owned utility partner. All MBCP service area outside of southern Santa Barbara County is in partnership with Pacific Gas & Electric (PG&E).

Energy Programs Advertising: (September 2020 through June 2021): As part of MBCP's commitments to reduce greenhouse gas emissions, support regional economic vitality and keep ratepayer dollars local, MBCP provides customers with access to energy programs focused on building electrification, transportation electrification and energy resiliency. Many of these programs are designed for specific customer segments such as agriculture or critical infrastructure and do not benefit from broad-reaching advertising and promotions campaigns. Other programs, however, might be applicable to all residential customers (currently approx. 250,000) and would benefit from a broad reaching campaign to maximize program dollars.

Tentatively scheduled for September/October, MBCP may launch a two-part residential energy program aimed at home electrification, specifically to offset costs associated with installing home electric vehicle charging units, as well as electric heat pump water heaters. Both programs (formal names TBD) will support the Building component of MBCP's Electrification Strategic Plan. MBCP's Electrification Strategic Plan (ESP) aims to support the transition from fossil fuel sources such as natural gas, to electricity generated from clean or renewable energy sources. The ESP identifies three key sectors as having the greatest potential to reduce reliance on fossil fuels and therefore reduce greenhouse gas emissions: Transportation, Building and Distributed Energy Resources.

Pending final program details, MBCP may elect to promote these or other energy programs through Media Buyer services. The geographic focus for Energy Programs Advertising will likely include MBCP's current service area (Monterey, Santa Cruz and San Benito Counties plus the Cities of Morro Bay and San Luis Obispo) but also could include the enrolling communities

CAMPAIGN GOALS

Enrollment Advertising

The purpose of MBCP enrollment is to inform and educate residents and businesses in (PG&E's service territory) of Arroyo Grande, Del Rey Oaks, Guadalupe, Grover Beach, Paso Robles, Pismo Beach, Santa Maria, Solvang as well as the unincorporated areas of Santa Barbara County about their upcoming January 2021 enrollment. Additionally, MBCP potentially will enroll residents and business in (SCE's service territory) in Carpinteria, Goleta and the southern portion of unincorporated Santa Barbara County. Given that all electricity customers will be automatically enrolled in MBCP, the campaign is essentially a public service announcement: reducing doubt, answering questions, and motivating customers to consider opting-up to our 100% renewable service offering, MBPrime, which supports electricity sourced exclusively from wind and solar. The enrollment campaign also serves as an opportunity to alert MBCP customers about other information as needed. MBCP's enrollment goal is to maintain 98% enrollment.

Energy Programs Advertising

The purpose of Energy Programs advertising is to promote select MBCP Energy Programs and increase program participation. The approach will be twofold; 1) Promote 'EV Home Charging' rebates, aka incentivize residential customers to install electric vehicle charging units in their homes; and, promote 'Heat Pump Water Heater Exchange' rebates aka incentivize residential customers to replace their gas water heater with an electric heat pump water heater 2) Raise awareness about MBCP's Electrification Strategic Plan, educate customers about the concept of "electrification," while raising awareness about MBCP Energy Programs in general. The goals for Energy Programs advertising are to: maximize participation in Energy Programs, continue growing brand awareness, raise awareness about Energy Programs and MBCP's Electrification Strategic Plan.

SCOPE OF SERVICES

MBCP is in search of a strategic media buyer who can work collaboratively to refine campaign messaging, raise brand awareness, educate customers and communities, reduce customer confusion, maximize Energy Program participation, and identify the best outlets to reach residents and businesses in the cities of Arroyo Grande, Carpinteria, Del Rey Oaks, Goleta, Guadalupe, Grover Beach, Paso Robles, Pismo Beach, Santa Maria, Solvang and the County of Santa Barbara, as well as MBCP's entire service area including Monterey, San Benito and Santa Cruz Counties, as needed. The media buyer is expected to be responsive, easy to work with, and provide great references. **Deliverables include securing advertising opportunities in print news (dailies, weeklies, monthlies), radio, digital & social, and outdoor (local transit, bus kiosks, billboards).** The campaign's execution includes the following:

Strategic Development & Plan

- Qualitative and quantitative research to determine best media vendors for target market, price point, and potential to raise public awareness.
- Present list of strategically selected media vendors, description of service(s), ad specifications, and timelines

Media Buying

- Media Buyer to negotiate on MBCP's behalf for the highest reach, frequency value, and impact
- Media Buyer is responsible for reconciling media contracts, invoices, and discrepancies to ensure client receives exactly what was ordered
- Media Buyer to pay all media vendor invoices and provide MBCP with invoice copies, receipts of payment, and affidavits as proof of performance

Media Tracking & Optimization

- Frequency of geo-targeted digital, social, radio and print advertisements must be thoroughly planned, tracked, and monitored. Reduced or conditional digital/social campaign recommended for Phase 1 Enrollment to avoid increased customer opt-outs
- Ongoing campaign management that allows MBCP to see digital campaigns in action through stats, live updates, and reports

TIMELINE

Enrollment Advertising: October 2020 through March 2021 and August 2021 to December 2021

Energy Programs Advertising: September through June 2021 or until funds are depleted

BUDGET

The shall-not-exceed budget allocation does not include costs for media buyer services, only the costs of advertising. We anticipate declaration of commission/media buying services charges being part of the contract negotiation process.

- Total spend = \$200,000
- Enrollment Advertising and Promotions = \$150,000
- Energy Program Advertising and Promotions = \$50,000

SUBMISSION REQUIREMENTS

1. Information on the experience of the entity and key personnel relevant to the scope of services
2. Proposed timeline for the completion of the requested services
3. Description of proposed methodology to design advertising strategy
4. Demonstration of how services will address the project goals
5. Full scope of requested services
6. Pertinent conflicts of interest
7. Pertinent references
8. Any edits to the standard MBCP contract (attached to the RFP)

EVALUATION CRITERIA

Bids will be evaluated based on the following list of criteria:

- Cost to MBCP for the services identified in this RFP;
- Qualifications and experience of the entity and key personnel assigned to the MBCP team;
- Proposed approach, including clarity of understanding of the scope of services to be provided and appropriateness of the proposed services;
- Suitability of the proposed timeline for the completion of the proposed services;
- History of successfully performing services for other public agencies, CCAs or utilities;
- Financial viability of the respondent;
- Existence of and circumstances surrounding any claims and violations against the respondent, its representatives or partners; and
- Pertinent references.

RFP SCHEDULE

Release RFP	June 23, 2019
Deadline for Question Submittal	June 26, 2020
Posting of Responses to Questions	July 1, 2020
Proposals Due	July 6, 2020
Interviews	July 8, 2020
Contract Negotiations	July 10 - July 24, 2020
Award Contract	July 24, 2020
Contract to MBCP Operations Board	August 12, 2020
Contract Completed	August 14, 2020

RESERVATION OF RIGHTS

MBCP reserves the right to:

- Consider factors other than those specified above and to request additional information from any/all respondents as part of the selection process.
- Change the requirements and/or due dates as may be necessary.
- Reject all responses received in relation to this RFP.
- Negotiate with any bidder and to engage in simultaneous negotiations with multiple bidders.
- Make no commitment to any bidder and provides no guarantee that a contract will be awarded.
- Discontinue this RFP process at any time for any reason.

CONFIDENTIAL OR PROPRIETARY CONTENT

Any page of the proposal package that is deemed by Proposer to be a trade secret by the Proposer must be clearly marked "CONFIDENTIAL INFORMATION" at the top of the page.

PROPOSAL DELIVERY

Proposals must be received by 3:00pm Pacific Daylight Time on July 6, 2020 through electronic submission and shall be directed to the following points of contact:

Monterey Bay Community Power
Authority Attn: Peter Berridge
Email: info@mbcp.org, pberridge@mbcp.org

Proposer shall be responsible for all costs associated with preparing and submitting the proposal. All inquiries regarding this RFP must be directed, in writing, to info@mbcp.org and Peter Berridge at pberridge@mbcp.org.