

**Request for Qualifications**

**No. 21-002**

**For**

**Marketing, Communications, Strategy, Public Education, Digital and Graphic Design**

**Issue Date: Friday, March 19, 2021**

**Response Deadline: 5:00 p.m. on April 2, 2021**

**Orange County Power Authority**

**P.O. Box 54283**

**Irvine, CA 92619-4283**

## **I. Background**

Orange County Power Authority (OCPA) is the new electricity provider for the cities of Buena Park, Fullerton, Huntington Beach, and Irvine all located with the boundary of Orange County. OCPA anticipates beginning service to customers in 2022 serving approximately 313,836 customer accounts and 4,355 GWh of annual load. For more information, please visit OCPA's temporary website at [www.ocpower.org](http://www.ocpower.org).

## **II. Scope of Services**

We are seeking a lead firm to provide marketing and communications strategy and implementation services for Orange County Power Authority (OCPA). Branding and messaging services will also be needed so that the OCPA can educate residents within the service territory on Community Choice Energy (CCE) and the options that they will have before them prior to the 2022 launch. The successful Proposer(s) will need to assist with press/medial relations, public affairs, web and graphic design, and the utilization of various on-line platforms.

Finally, we seek assistance designing and implementing a public engagement strategy in collaboration with community stakeholders that would increase public awareness of OCPA within its member communities.

The services we seek in order of urgency are as follows:

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

The preference is to select a single firm to provide professional marketing, public affairs and design services for OCPA, but we reserve the right to select one or more firm depending on the needs of OCPA and the qualifications of the proposer(s). Your firm must have staff capable of meeting OCPA's service needs and would need to be able to mobilize the full complement of needed staff within days of award. To the extent that you lack specific expertise in any of the disciplines needed by OCPA, a professional team of subcontractors or associate firms could be assembled by the lead vendor to complement their technical expertise.

Under the direction of OCPA staff and in collaboration with other OCPA vendors, the selected firm(s) will develop, enhance, implement, and maintain a multi-faceted plan for building program awareness, engaging potential OCPA residential, commercial and industrial, customers, supporting the program website and design needs, promoting OCPA's product offerings with a goal of building brand and program awareness via a framework for the development of long-term community engagement for OCPA.

**Tasks by service category may include but are not limited to the following:**

**A. Agency Branding, Design, Messaging and Identity**

- Working with the existing program name, Orange County Power Authority, develop brand/logo, style guides, and create sub-brand names/logos for different power product offerings and programs.
- Working with staff and key leadership, develop core messaging for use on the website, in marketing materials, and for community presentations.
- Update and maintain a multi-functional, multi-lingual website that includes a rate calculator, ability to opt-out of the program and other interactive features.
- Develop and maintain social media presence for OCPA using existing platforms in OCPA member communities (e.g. Facebook, Instagram, Twitter, Nextdoor, etc.)
- Develop/update program collateral including FAQs, program brochures, fact sheets, event give aways, and power point templates as needed.
- Develop one or more short informational videos for use on OCPA's website, social media and at community meetings.

**B. Community Outreach and Stakeholder Engagement:**

- Develop a communications and outreach plan detailing the methods and timing of various local communications strategies including the integration of a media and advertising campaign as outlined below.
- At the direction of OCPA 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.
- Develop and maintain an OCPA list-serve to facilitate outreach/engagement activities. Refine/expand use of regular e-newsletters and information blasts to OCPA's list-serve and other local communication outlets.
- Sub-contract with community-based organizations to build local capacity and augment OCPA's efforts to carry out outreach and engagement activities. The goal is for OCPA to build and deepen relationships with its member communities to inform about OCPA's programs and to build a sense of "community ownership" with OCPA as a local service provider.

**C. Marketing and Advertising Campaign:**

- Development multi-lingual and multi-cultural advertising campaign to raise public awareness of OCPA and its offerings; this will include both paid and earned media, print and digital, in a variety of mediums which could include local newspapers, on-line and social media , radio spots, billboards, bus backs/bus shelters, and other strategies to effectively reach future OCPA customers in a positive way
- Manage and conduct press outreach – schedule editorial board meetings, draft press releases, op-eds and news articles.

- Develop visual look, support content and maintain a regular social media presence for OCPA on Facebook, Twitter, Instagram, Nextdoor, etc.

**D. Media Relations and Public Affairs**

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

**E. Project Management/Performance Metrics:**

- Participate in content and design meetings with OCPA staff, including weekly or bi-weekly project calls
- Provide presentations and project updates to OCPA Board and leadership as requested
- Provide flexible capacity to complete multiple design projects simultaneously during busy periods, and ability to rapidly ramp up or down the capacity dedicated to this contract to meet fluctuating client needs.

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.

**F. Legislative Advocacy and Grant Management/Assistance**

- Assist with bill tracking and legislative analysis
- Assist with legislative advocacy and support/opposition letter preparation
- Grant research, writing, application management, and reporting

**III. Request for Qualifications Procedure**

The RFQ will be submitted electronically to [procurement@ocpower.org](mailto:procurement@ocpower.org) and must be received by 5:00 p.m. on April 2, 2021.

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

**Submission Requirements**

Your submission should include the following:

➤ **Cover Letter**

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

- The arrangements are clearly identified, and relationships are fully disclosed; and a primary (Lead) Proposer is designated who will be responsible for all contract performance.
- The signature of the individual authorized/obligated to commit the bidder to this project is included.
- In signing proposal, statement that the bidder agrees that the terms of the proposal and the costs as submitted are firm for a period of 120 days from proposal due date, unless otherwise negotiated with OCPA.
- The cover letter should also include:
  - o The RFQ number and title
  - o Name and addresses of proposing firms and/or individuals
  - o Phone and email address of sole or lead proposer
  - o Primary contact person

➤ **Table of Contents**

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

➤ **Qualifications and Experience**

- Proposer shall demonstrate expertise and experience with graphic design, web design and public communications campaign of this size, scope, complexity, and unique OCPA customer base. Preference will be given to proposers with previous experience working in the energy/sustainability field and/or for a community choice energy program (or similar type program) that has already launched in California.
- Proposers shall demonstrate experience with effective use of digital, video-based, and social media as well as more traditional methods of print, radio, and television media.
- Proposer shall demonstrate experience with multi-cultural communications campaigns and translation.
- Proposer shall have experience with content development, design, and management of direct mail on specific timelines.
- Experience working with local and regional press outlets, print shops, and mail houses is desirable.

➤ **Project Team Staffing**

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

➤ **Schedule**

Please include a detailed schedule which lists milestones and estimated completion dates of each of the tasks and sub-tasks listed in this RFQ.

- o Cost of Services

- The initial budget for this project will be limited and focused but not restricted to Service Category 1 (Branding, design, messaging and identity, website design, content development). Please provide a time and materials quotation in a format substantially similar to the following table for the appropriate staff necessary to execute task orders aligned within each of the service categories.

	<b>Working Title/Name</b>	<b>Specialty</b>	<b>Billing Rate</b>
<b>Account Management</b>			
<b>Creative</b>	Graphic Designer/Susan Jones	Create visual concepts layout production	\$50.00
	Senior Web Developer/Bill Smith	Design, build, websites and online apps	\$75.00
<b>Media</b>			
<b>Digital</b>			
<b>Project Management</b>			
<b>Communications</b>			
<b>Strategy</b>			
<b>Legislative Advocacy</b>			
<b>Grant Application/ Management</b>			

➤ **Company Overview**

Please provide the following for your company:

- Official registered name (Corporate, D.B.A., Partnership, etc.), address, main telephone number, and website.
- Primary key contact name, title, address, direct telephone number(s).
- Brief history, including year established, and relevant experience with other energy/sustainability/environmental campaigns.

➤ **References**

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

- **Certificates of Insurance for the following coverages:**
  - Commercial General Liability – for bodily injury, property damage, and personal injury \$1,000,000 – each occurrence \$2,000,000 – in aggregate
  - Business Automobile Liability – “any auto” (Company Vehicles) – at least \$1,000,000
  - Personal Automotive Liability – “any auto” (Personal Vehicle) – at least \$500,000
  - Worker’s Compensation and Employer’s Liability (EPL) – injury or death, each accident at least \$1,000,000 (EPL not required for Sole Proprietor).

- **Statement of No-Conflict/Anti-Trust**

Please provide a statement that describes how proposer(s) will adhere to anti-trust and collusion laws while providing service to OCPA. Also provide a statement that confirms that proposer(s) and any subconsultants responding to this RFQ 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 proposer(s) would be unable, or potentially unable, to render impartial assistance or advice to OCPA consistent with the requirements of California Government Code section 1090; or that a proposer(s) objectivity in performing the work is or might otherwise be impaired; or bidders have an unfair competitive advantage.

- **OCPA Rights**

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

- Disqualify any and all proposals that are not submitted in accordance with the required format described in this RFQ
- Reject any and all proposals submitted
- Request additional information
- Issue Addenda to this RFQ
- Award all, part, or none of the work contemplated in this RFQ
- Remedy errors in the RFQ
- Cancel the entire RFQ
- Approve or reject the use of a subcontractors/supplier
- Negotiate with any, all, or none of the Proposers. If OCPA is unable to negotiate a final contract Terms and Conditions that are acceptable to OCPA, OCPA reserves the right to award the contract to another Proposer
- Award a contract to one or more Proposers