

Notice Type: Request for Proposal

**Short Title: Efficiency Vermont Residential
Marketing Campaign**

Posted date: February 25, 2015

Questions due: March 2, 2015

Answers posted: March 6, 2015

Proposals due: March 13, 2015

Decision: March 20, 2015

Introduction

Vermont Energy Investment Corporation (VEIC), a nonprofit organization, requests proposals for **Marketing Campaign for Residential Customers**.

Responses to this RFP must be delivered electronically to VEIC by **5:00 p.m. EDT on Friday, March 13, 2015**. Responses submitted after 5:00 p.m. EDT will not be accepted. Responses must be submitted electronically via e-mail to: pnichols@veic.org with **RFP Submittal Efficiency Vermont Residential Marketing Campaign**, in the subject line.

1. For efficiency of review, VEIC has specified a numbering protocol for the order in which the Response Requirements are to be presented. Please follow this numbering protocol and do not re-number, insert numbers, or otherwise modify the sequence. Responses that do not follow this numbering protocol will not be considered.
2. When responding via e-mail, all of the documents for the submittal must be presented in the same order as the numbered requirements below. All submissions should consist of one (1) PDF document containing all of the requested information.

Individual questions regarding this RFP will be responded to only as follows: questions regarding requirements and scope of work will be received up to **5:00 p.m. EST on Monday, March 2, 2015** via email only at pnichols@veic.org and answers will be posted on the VEIC website (www.veic.org) no later than **4:00 p.m. EST on Friday, March 6, 2015**. Questions submitted after March 2, 2015 will not be responded to.

Background on Vermont Energy Investment Corporation

Vermont Energy Investment Corporation (VEIC) is a mission-driven, nonprofit organization dedicated to reducing the economic and environmental costs of energy use. Founded in 1986, VEIC is nationally and internationally recognized for advancing energy efficiency, energy conservation, and renewable energy programs and projects across the United States, Canada, and Europe. VEIC employs over 275 professionals and is headquartered in Burlington, Vermont, with offices in Washington D.C., Ohio, and New Jersey.

VEIC gained national prominence as the contractor for the nation's first energy efficiency utility, Efficiency Vermont. The company also designed and operates utility-scale contracts for energy efficiency service delivery with municipal utilities in the mid-West (American Municipal Power), known as Efficiency Smart, and with the District of Columbia, known as the DC Sustainable Energy Utility (DC SEU). The majority of the staff works for these VEIC divisions.

For additional information, please see www.VEIC.org

Background on Efficiency Vermont

Launched January 1, 2000, Efficiency Vermont helps all Vermonters to reduce energy costs, strengthen the local economy, and protect the environment by making homes and business energy efficient. Efficiency Vermont provides technical assistance, rebates, and other financial incentives to help Vermont households and businesses reduce their energy costs with energy efficient equipment, lighting, and approaches to construction and major renovation. Additionally, we partner extensively with contractors, suppliers, and retailers of efficient products and services throughout the state.

Vermont Energy Investment Corporation now operates Efficiency Vermont under an appointment issued by the Vermont Public Service Board.

For additional information, please see www.encyvermont.com

Project Overview

Efficiency Vermont offers services to residential customers across the State. However, many residential customers are not aware of the services offered by Efficiency Vermont, and among those who are, they remain relatively unfamiliar with what Efficiency Vermont specifically does, the full suite of services available, and the unique programs offered for specific audiences. As a result, Efficiency Vermont is looking for new ways to market the full breadth of its services while keeping the message simple and the call to action single-focused.

To accomplish this, Efficiency Vermont plans to evolve its approach to the market – from executing single transactions, to cultivating an ongoing relationship with its customers. The purpose of this effort is to present a holistic view of what Efficiency Vermont offers and how those services can benefit customers.

We are seeking a partner to help us develop and execute a strategy to increase awareness and familiarity of the Efficiency Vermont brand by focusing on the relationship and stream of services we can provide to help Vermont residential customers use energy more efficiently.

Scope of Work

By submitting a response to this RFP, the Bidder acknowledges understanding and acceptance of this Scope of Work, and agrees to fulfill all of its terms in the event of a contract award.

This will be the primary focus of Efficiency Vermont's residential advertising in the marketplace in 2015.

1. **Creative strategy, concepting, and campaign development.** This includes the development of a minimum of three campaign concepts for VEIC's consideration and approval; and development of an integrated tactical plan for how the campaign will come to life across multiple channels and forms of media (listed below). Vendors will be asked to provide:
 - a. Design mock-ups and sample headlines for ideation.
 - b. A recommendation on channels and tactics to achieve maximum impact. Tactics should include at a minimum the following:
 - TV (at least 2 creative executions will need to be developed in order to support a yearlong media campaign)
 - Radio/Digital Radio (Pandora)

- Digital and Web
 - Social media
 - Print
 - Untraditional marketing Ex: Movie theaters, hulu, events etc.
- c. Messaging should induce the desired action on the part of our audience.
 - d. Consider seasonal and/or holiday-related executions/channels
2. **Creative execution and production** across many forms of media that could include social and digital, TV and video, radio, print, and others to be determined. Services include, but are not limited to, copywriting, graphic design and production (original and resizing), radio production, and video production. Vendors will be asked to:
- a. Create copy and design for each medium, and provide revisions (typically 2-3 rounds) based on VEIC feedback.
 - b. Produce creative materials for different media requirements and deliver, as required or directed by the media buyer, to the outlet.
 - c. Source or create raw assets, such as photographs, illustrations, voice overs, and graphics as needed.
 - d. Deliver complete final design files, including major versions of native files, raw assets, and printable PDFs to VEIC.
3. **Project management**, including the creation of schedules and management to deadlines. Vendors will be asked to:
- a. Create a project plan of specific tactics, timelines, and milestones.
 - b. Manage work to meet deadlines.
 - c. Maintain regular communication with VEIC, arranging for adequate review and approval.
 - d. Facilitate meetings with VEIC, take notes, and follow-up.
 - e. Manage the production work of outside vendors, including collecting estimates and meeting deadlines.
4. **Performance report** and project debrief with recommendations for future improvements.

Following completion and implementation of the Scope of Work presented above, VEIC may request ongoing support, maintenance and revisions from the selected Contractor to refresh program materials on a seasonal or as-needed basis.

Efficiency Vermont works with a dedicated media planner and buyer who has a separate budget and will maintain responsibility for the media-buying portion of the campaign. This includes negotiating prices, coordinating insertions, and flighting. The buyer will be available to consult and advise the creative vendor on channels as needed and will provide final specifications. The total advertising buy will be approximately \$250,000.00.

*RFP responders may elect to subcontract to fulfill any of the three functional areas; however, subcontracting may be subject to VEIC's final approval. The scope of work for subcontractors, along with bios and past examples should be included in the submittal if they are known.

Performance Period

The Efficiency Vermont residential marketing campaign must launch by July 1, 2015.

Work under this RFP will begin immediately upon contract execution and continue through the delivery of the final design templates at the close of the project at the end of the year.

Anticipated Schedule / Milestones

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| • RFP issued | February 25, 2015 |
| • Questions due to VEIC | March 2, 2015 |
| • Answers to questions posted to VEIC website | March 6, 2015 |
| • Proposals due to VEIC | March 13, 2015 |
| • Selection of Service Provider | March 20, 2015 |
| • Contract development and execution | April 10, 2015 |
| • Project kick-off | April 13, 2015 (week of) |
| • Campaign launch | July 1, 2015 |

Proposal Requirements

Responses to this RFP must be delivered electronically to VEIC by **5:00 p.m. EDT on Friday, March 13, 2015**. Responses submitted after 5:00 p.m. EDT will not be accepted. Responses must be submitted electronically via e-mail to: pnichols@veic.org with **RFP Submittal Efficiency Vermont Residential Marketing Campaign**, in the subject line.

All responses must be no more than ten (10) pages in length, be formatted to standard letter paper size (8.5" x 11") with 1-inch margins all around and a common font set to 11-point or larger.

All responses must include a cover letter with the primary person's contact information. Email responses must have all the required information assembled into one (1) PDF file. Multiple files and/or file formats will not be accepted.

Please include the following information in your response to this bid request:

1. A brief description of your firm's structure and capabilities, including resumes of key personnel;
2. A list of all services to be provided in-house and services to be provided by any outside consultants. If any services are to be provided by outside consultants, please provide a brief description of the firm, its role, and capabilities;
3. A description of your approach, methodology, and process for completing the work;
4. A proposed timeline, including key milestones and deliverables;
5. A price quote;
6. Examples or case studies of similar work your firm provided to other clients;
7. Two (2) references that have used your professional services for a similar project—if applicable. Include a contact name, address, and a contact phone number;
8. A signed copy of the Contractor Certificate of Compliance document.

Budget

The budget for this initiative is not to exceed \$85,000.00. This includes all labor and materials incurred in the Scope of Work outlined above and provided by direct staff or subcontractors.

Proposals must include all expenses to complete the Scope of Work outlined above and provided by direct staff and subcontractors. *This budget does not include possible ongoing support, maintenance and revisions to refresh program materials; such ongoing services would be negotiated independently and subject to a separate Work Order with a budget estimated to be no more than \$50,000 for labor and expenses incurred to complete the work. This budget does not include possible new campaign creative that may be requested following completion of the Scope of Work outlined above; such ongoing services would be negotiated independently and subject to a separate work Order and budget.*

Evaluation Criteria

Proposal selection will be qualifications-based. Proposals will be evaluated based on the written submission and the following criteria:

- Responsiveness to work scope and program needs (35%)
- Demonstrated experience and expertise in similar projects (35%)
- Cost-effectiveness (10%)
- Familiarity with energy/energy efficiency (10%)
- Vermont-based vendor (10%)

VEIC reserves the right to evaluate proposals on criteria not listed above.

Contract Award

VEIC may award contracts to one or more firms. It may award a contract based solely on the response to this RFP, or it may award a contract following discussion or negotiations with one or more bidders. VEIC may request additional data or material prior to making a contract award. VEIC will intend to negotiate contract terms with the most qualified vendor. If unsuccessful, VEIC would intend to then negotiate with the next most qualified vendor, until reaching satisfactory contractual arrangements.

Insurance Requirements

Before commencing work, the Contractor shall provide Certificates of Insurance to show that the following minimum coverages are in effect. Where applicable the Certificates of Insurance shall name VEIC as additionally insured party as its interests may appear. All policies shall be noncancellable without 30 days prior written notice from the insurance carrier to VEIC. It is the responsibility of the Contractor to maintain current Certificates of Insurance on file with VEIC through the term of this Contract.

Workers' Compensation: With respect to all operations performed under this Contract, the Contractor shall carry workers' compensation insurance in accordance with the laws of the State and any other state in which it is performing the Contract Scope of Work.

General Liability and Property Insurance: With respect to all operations performed under this Contract, the Contractor shall carry general liability insurance having all major divisions of coverage including, but not limited to:

Premises – Operations
Independent Contractors' Protective
Products and Completed Operations (where appropriate)
Personal Injury Liability
Contractual Liability

The policy shall be on an occurrence form and limits shall not be less than:

\$1,000,000 Per Occurrence
\$1,000,000 General Aggregate
\$1,000,000 Products/Completed Products Aggregate (where appropriate)
\$50,000 Fire Legal Liability

Automotive Liability: The Contractor shall carry automotive liability insurance covering all motor vehicles, no matter the ownership status, used in connection with this Contract. Limits of coverage shall not be less than \$1,000,000 combined single limit or the amount required by any applicable state law, whichever is greater.

Questions

Individual questions regarding this RFP will be responded to only as follows: questions regarding requirements and scope of work will be received up to **5:00 p.m. EST on Monday, March 2, 2015** via email only at pnichols@veic.org and answers will be posted on the VEIC website (www.veic.org) no later than **4:00 p.m. EST on Friday, March 6, 2015**. Questions submitted after March 2, 2015 will not be responded to.

Limitation

This RFP does not commit VEIC to award a contract or to pay any costs incurred in the preparation or submission of proposals. VEIC reserves the right to reject any or all proposals received in response to this RFP, to negotiate with any qualified bidder or to cancel in part or in its entirety the RFP, if any of these actions is deemed by VEIC in its sole discretion to be in VEIC's best interest.