

## **Silicon Valley Clean Energy Marketing & Advertising RFP Q&A**

- 1. In the scope of work there is a mention of deploying ads in working with media companies. In the case of digital are we expected to go through a media agency to do the planning and buying? Or would we do the planning and buying?**

We will want the agency that is awarded the contract to take care of the planning and buying, as well as assist with negotiating rates. There may be cases where Silicon Valley Clean Energy (SVCE) sends a request for small local print ads, and those will be communicated on an as-needed basis.

- 2. What percent of rebate programs currently exist and what percentage will be rolling out over the years?**

SVCE has a [Decarbonization Strategy & Programs Roadmap](#) that we have been working on deploying at a steady pace. A current list of programs is available [here](#). With the most recent IPCC "code red" report, the SVCE board of directors directed staff to double down on key programs targeted around EV charging access for multifamily properties and whole home electrification. The electrification programs will result in additional rebates, beyond the current one for heat pump water heaters. Marketing and outreach are also called out as a needed tactic in the double down approach to drive additional interest and action with home electrification.

- 3. For the pitch, will that be done via zoom or an in-person meeting?**

SVCE does not have yet have an official policy for in-person meetings. Interviews are most likely to take place virtually, especially given the timeline right after the holidays.

- 4. Section 4 talks about proposed solutions and you also talk about a pitch, can you talk about the difference – between what you expect us to submit in our written proposal, and then the next step of the in person or virtual? Should we put it all into a presentation for the proposal and then present that proposal in round 2? How much of our ideas and concepts are we expected to put in the interview pitch vs. presentations down the road?**

SVCE has an RFP template that we follow for most solicitations, but to help differentiate these to sections, the proposed solution is meant to help walk through your approach to leading an ad campaign for SVCE to help address our needs and meet our goals. For example, what would you propose for reaching SVCE customers to increase electrification awareness – just a digital approach, a larger market activation, branded cell phone charging stations at events, etc. We will score proposals based on how well the bidders understand our specific needs and challenges, and how you would help us reach our goals in marketing and advertising. This can be done as a write up or a set of slides, the proposal does not have to be a 10 page write up if you would approach it differently or more succinctly. We are just looking for bidders to cover why you are proposing certain approaches for us to achieve our goals.

- 5. So that example you put forth about cell phone chargers at events, are you looking for those types of ideas are you looking for that level of description and specificity in the initial proposal? What type of detail should we put into the campaign proposals?**

We recommend a balanced approach with proposals between explaining a recommended strategy, but also offering some creative concepts, however rough to help showcase your team's creativity and skill. If you have awesome ideas you want to put into your proposal,

that would be encouraged, even if they are very rough mockups/ideas. The SVCE team will have strong opinions during the creative development period when working with a partner agency. We really care about the messaging we put out into the community. It is intentionally open ended on how you want to capture our attention with your presentation. We want to get a sense of how you work as an agency and how you will help us achieve our goals. If you include content in your proposal about how you can make heat pump water heaters the coolest thing since sliced bread, you can continue to refine that idea and repurpose it for the interview.

**6. To clarify, you are not necessarily looking for a presentation of a final concept?**

Correct. We are not looking for final concepts during the interview stage and only looking to get a sense for how it would be to work with your agency before making a final decision.

**7. What was most successful from your previous efforts, and what, if anything, was not successful?**

Working with a consultant to recommend overall campaign tactics, make expert recommendations for placing ads and frequency, helping to optimize ads, and come up with the messaging, script and videos were all very successful. What was not successful was attempting to work with multiple partners to execute different tasks, such as one agency did messaging work and another designed the ads.

**8. Who developed your previous campaigns and why are you not continuing with them?**

We worked with School of Thought. As a public agency, we are required to run a competitive solicitation process, especially when triggering a certain budget threshold.

**9. Do you have a budget in mind, for both agency services and paid media?**

A rough estimate for an annual marketing budget for professional services is \$75,000 - \$80,000. The paid media spend will likely be higher with budget coming from the relevant electrification programs, this will be determined once final campaigns are developed.

**10. Are results of the customer surveys and focus groups conducted in 2018-2020 available for review?**

Please view the following board packets:

- January 2021, [page 287](#), [presentation](#) starting on page 12
- November 2019, [page 124](#), [presentation](#) shows customer personas

**11. Has the updated market survey been completed and is it available for review?**

This has not yet been completed. The prep work is taking place now and we expect to have results in January/February.

**12. Is the advertising campaign created for eHub that ran in the Spring and Summer of 2021 available for review?**

Please view the following board packets:

- [April 2021, page 84](#)
- [May 2021, page 210](#)
- [September 2021, page 172](#)

**13. Is "The Switch is On" education campaign, which ran November 2020-January 2021 available for review?**

See page 108 in [this board packet](#). Also visit [The Switch Is On](#) Instagram account to view the active campaign. SVCE shared out the same creative developed for this campaign through our own channels.

**14. We'd like to get a general sense of budget including media – do you have a quarterly budget range you had in mind (covering creative services, project management, and media)?**

See question #9 above.

**15. Do you have an anticipated duration of the campaigns?**

No, this will be decided during the campaign development. Our previous campaigns have run anywhere from 6 to 12 weeks. We expect these campaigns to run a little longer, but we do like creative refreshes, especially as it relates to seasonal changes.

**16. Do you have audience segmentation information available?**

See the board packet from November 2019, [page 124](#), and the [presentation](#) shows SVCE customer personas.

**17. Is SVCE open to conducting research to measure and understand the emotional connection with the brand?**

Yes, we are open to this suggestion, budget permitting.

**18. You mentioned two campaigns during the questions call, one promoting education via the eHub and website resources, and the other about elevating the need for whole-home electrification. Are they of equal weight / import, or is one more important to you (or is this all TBD)?**

These are of equal importance. However, depending on what the goals of the upcoming electrification programs are, that could carry more weight if we want to push a large number of rebates.

**19. Would both campaigns run concurrently? What do you envision in terms of timing and runtime for them?**

The eHub campaign would be launched first as those resources are already live. We don't have a set time in mind, but typically we do want to leverage seasonal opportunities, e.g., push environmental benefits messaging in the spring, switch to energy resilience in the late-summer and fall during wildfire and Public Safety Power Shutoff season. For run time, we are looking for recommendations on this, but around 12 weeks seems appropriate.

**20. Do you envision the two videos being tied to Campaign #1 and #2, respectively?**

Yes

**21. To what degree are you looking for us to indicate how the proposed solution and services can be leveraged by other CCAs (e.g. through creative, strategy, media delivery, etc.)?**

We do want to keep the possibility open to utilize the services of a creative agency to assist with broader/regional CCA advertising needs if there is an opportunity to deploy a collaborate campaign with our neighboring CCAs. This is just an idea and there are no commitments that this is something that will happen during the contract period.

**22. What % of your customers are businesses vs residents?**

90% of our customers are residential and the remaining 10% are a mix of small and medium business, large commercial and industrial and agricultural.

**23. Which is the bigger opportunity: getting consumers/residents to switch to electric, or getting businesses to switch**

The programs/campaigns identified in this RFP are focused on residential customers. There are many existing homes that need to phase out methane gas appliances and gas-powered passenger vehicles in our service area. And the challenge is the emotional attachment customers have to certain appliances, like gas stoves, their cars, also the economic investment needed to make these changes.

**24. What percentage of customers get eStatements (vs. printed paper statements)**

SVCE does not control customer billing. Customers receive SVCE electric generation charges on their PG&E bills. Approximately 65% of residential customers receive an e-bill. SVCE does have customer emails for those with an email address on file, and we do conduct regular email marketing campaigns.

**25. What relationship do you have (if any) with San Jose Clean Energy, and/or similar providers that leverage PG&E's billing and distribution network?**

We work closely with San Jose Clean Energy, this includes joint procurement and shared regional awareness campaigns, such as the recent (June 2021) Time-of-Use rate transition. We speak regularly with our colleagues at all the Bay Area Community Choice Energy agencies.

**26. Have you ever done a joint/combined campaign with another provider? If so, please tell us about it.**

We have done some cost-sharing with San Jose Clean Energy for the June 2021 Time-of-Use rate transition to help deploy ads in Spanish, Vietnamese and Chinese. We have attempted broader regional campaigns, but these tend to fall through due to budget differences and other agencies having strict contracting rules with other vendors. The first regional campaign where multiple agencies deployed ads locally was for [The Switch Is On](#), but even with this campaign, each agency paid for ads within their own service area to avoid paying for ads with spillover into another service providers territory.

**27. How much information do you have about the gas and electric appliances in specific customer homes and businesses (e.g. Home X is pretty green, home Y is a train wreck) If you don't have it, can PG&E provide it?**

SVCE has access to customer meter data. This allows us some insight into certain behaviors at customer homes. We also know customer electric rates, which indicate if a customer has solar or an EV.

**28. If available, can you share information about expected rebates and incentives that might become available over the next year-ish.**

This is still too soon to say, but we are expecting that we will build upon our successful heat pump water heater rebate program and move into heat pump heating and cooling, and additional home electrification appliances such as induction stoves and home EV chargers. We also currently have a couple of rebates for solar + storage installations.

**29. Which natural gas thingy is the most evil? Water heater, stove, dryer, forced air?**

Home water heating accounts for nearly half of a home's emissions sources. Space heating comes in second. See page 2 of our heat pump water heater [buyer's guide](#) for more info.

**30. What is SCVE's role (if any) in placing/deploying publicly accessible eVehicle charging stations**

SVCE has assisted with funding some EV charging at multifamily properties as part of innovation pilots. We also provided match funding with CALeVIP to deploy chargers throughout our service area (\$12M in funding committed). We are also currently in the process of developing an EV charging fund for chargers at multifamily properties as part of our free EV Technical Assistance program.

**31. Can you share any guidance you might have regarding the approximate annual budget for agency costs (creative services/strategy) vs 4rd party costs (printing/postage/paid media/radio). You might not know the exact budget but I'm going to guess you know if you are expecting a \$50K proposal or a \$500K proposal.**

See question #9 above.