



2019 Request for Proposals for Marketing Strategy Consulting

Peninsula Clean Energy is the locally-controlled electricity provider serving the business and residents of San Mateo County. We are reducing greenhouse gas emissions and offering customer choice at competitive rates.

Offers due Friday March 8, 2019 at 5:00 pm Pacific Time

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Attachments

- Supplier Diversity Questionnaire (Optional) – completed by vendor

Peninsula Clean Energy (PCE), a California Joint Powers Authority, is seeking proposals from interested vendors to respond to this RFP.

1 RFP Overview

Peninsula Clean Energy (PCE) programs include advancing the adoption of electric vehicles and transitioning building fossil fuel uses to low-carbon electricity. With this request for proposals (RFP), PCE requests proposals to assist in developing a 3 year marketing strategy plan.

This RFP

- Provides general background on PCE
- Describes the service sought by PCE (scope of work)
- Provides an opportunity for Proposers to describe their qualifications and assets and explain how they could contribute to the program

2 About Peninsula Clean Energy (PCE)

Peninsula Clean Energy (PCE), a community choice energy (CCE) aggregator, is San Mateo County's official electricity provider. Formed in February 2016, PCE is a joint powers authority, consisting of the County of San Mateo and all twenty of its towns and cities. PCE provides cleaner and greener electricity, and at lower rates, than the incumbent investor-owned utility (IOU), Pacific Gas & Electric Company (PG&E). PCE plans for and secures commitments from a diverse portfolio of energy-generating resources to reliably serve the electric energy requirements of its customers over the near-, mid-, and long-term planning horizons. PCE's programs include advancing the adoption of electric vehicles and transitioning building fossil fuel uses to low-carbon electricity. For more information on PCE, please go to www.peninsulacleanenergy.com.

As part of its mission-driven, collaborative, not-for-profit, locally-focused roots, PCE is committed to the following set of strategic goals:

1. Design a diverse power portfolio that is greenhouse gas free.
 - 100% GHG free by 2021
 - sourced by 100% CA RPS eligible renewable energy by 2025 on a time coincident basis, provided it is economically viable
 - create a minimum of 20 MWs of new local power by 2025
2. Continually strive to offer ECOPlus at rates that are lower than PG&E rates provided it is economically viable.
3. Stimulate development of new renewable energy generation and storage projects in San Mateo County and California through PCE's procurement activities.

4. Demonstrate quantifiable economic and environmental justice benefits to the County/region including by placing a priority on local hiring and inclusionary workforce development practices with a goal of increasing diversity.
5. Implement programs to further reduce greenhouse gas emissions and support the county's community-wide efforts to be completely GHG-free by 2045 by investing in electric transportation, energy efficiency and demand response, and partnering effectively with municipalities, business, schools, and nonprofit/faith organizations.
6. Maximize and maintain customer participation in PCE.
 - Provide a superior customer experience
 - Develop PCE brand awareness and loyalty throughout the County.
 - Actively encourage voluntary participation in its ECO100 renewable energy product
 - Actively encourage participation in other programs PCE develops
 - Achieve recognition as an EPA Green Power Community for all cities and towns in San Mateo County and EPA Green Power Partnership for all cities with municipal accounts enrolled in ECO100 by 2018
7. Build a financially sustainable organization.
 - Build sufficient reserves in a rate stabilization fund
 - Achieve an investment grade credit rating by 2021
8. Foster a work environment that espouses sustainable business practices and cultivates a culture of innovation, diversity, transparency, integrity, and commitment to the organization's mission and the communities it serves.
9. Leverage Peninsula Clean Energy/Silicon Valley expertise and relationships to support innovation across all of PCE's programs and activities.
10. Assist in setting up CCAs in other areas of the state, including where PCE has utility scale generation.

3 RFP Schedule

<i>Date</i>	<i>Event</i>
February 12, 2019	PCE launches RFP: publishes RFP Instructions.
February 20, 2019	Deadline for Proposers to submit questions (see below)
February 22, 2019	PCE provides responses to questions on PCE's website.
March 8, 2019	Deadline for Proposers to submit proposals
Week of March 18, 2019	Possible in-person interviews of top proposers
March 22, 2019	Anticipated date PCE will notify awardee
March 28, 2019	Anticipated date for Board execution of contract

Questions:

- **Question & Answer:** Proposers may submit questions concerning the RFP at Marketing@peninsulacleanenergy.com. All questions and answers will be shared with all Proposers and will be posted on PCE's website.
- **Proposal Review:** PCE may request clarifications by email or phone from March 11, 2019 through March 15, 2019. Prompt responses will be requested.

4 Proposal Submittal

Proposals must be received on or before the above deadline and submittal must be by email to Marketing@peninsulacleanenergy.com with the subject "Proposal - <Vendor Name> - Marketing Strategy Consulting".

By participating in PCE's RFP process, a Proposer acknowledges that it has read, understands, and agrees to the terms and conditions set forth in these RFP Instructions. PCE reserves the right to reject any offer that does not comply with the requirements identified herein. Furthermore, PCE may, in its sole discretion and without notice, modify, suspend, or terminate the RFP without liability to any organization or individual. The RFP does not constitute an offer to buy or create an obligation for PCE to enter into an agreement with any party, and PCE shall not be bound by the terms of any offer until PCE has entered into a fully executed agreement.

Only electronic submittals will be accepted.

5 Content of Response

Interested vendors must submit the following documents (except those marked “Optional”) to be considered for awarding of this proposal:

1. Cover Letter with the following elements (1 page):
 - Reference to this RFP
 - Legal business name, address, telephone number, and business status (corporation, limited partnership, individual, etc.)
 - Name of vendor’s representative with respect to this RFP along with telephone number and email address
 - A signature of an authorized individual

2. Approach (6 pg. max.):
 - Approach to PCE’s proposed Detailed Project Description
 - Suggested enhancements to PCE’s proposed Detailed Project Description
 - Goals and measurable objectives
 - Technical approach
 - Key challenges and resolutions

3. Qualifications and Experience (4 pg. max.): Submit the following information -
 - A brief summary of vendor’s history and background
 - A summary of similar projects completed or worked on within the last 2 years in California
 - A summary of project and/or program experience within San Mateo County
 - Marketing strategies deployed for similarly situated organizations
 - Identification of relevant licenses and certifications.

4. References:
 - Contact information for three (3) references from work performed in the last three years. Please include scope of work, dates of contract, contract amount, contact person, telephone number, and email address

5. 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 Automobile Liability – “any auto” (Personal Vehicles) – 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)

6. Supplier Diversity Questionnaire (Optional): PCE's Supplier Diversity Questionnaire is attached to this RFP. Please note, your response (or lack thereof) will have no impact on your contract status or eligibility to work with PCE in accordance with state law.
7. Proposed Schedule (table or chart, 1 pg. max)
8. Cost Proposal (2 pg. max, include rate schedule, if applicable)
9. Confirmation of acceptance of contract terms or explanation of proposed contract modifications (see Agreement Terms)
10. Project staff credentials (no page limit)

6 Review and Selection Process

PCE staff will evaluate the proposals provided based on the following criteria:

1. Completeness of Proposal/Content of Response
2. Qualifications of the firm and staff
3. Proposed approach to implement project
4. Past experience
5. Cost structure
6. Exceptions to PCE's contract template

7 Agreement Terms

Awardees will be required to enter into a contract using PCE's standard contract terms. Modification of the contract terms may be proposed by the Proposer for consideration by PCE but are not guaranteed to be accepted. Rejection of the final terms from PCE is grounds for disqualification.

PCE's standard contract terms are available for review here:

<https://tinyurl.com/pcecontracttemplate>

8 Supplier Diversity

Consistent with its strategic goals, PCE has a strong commitment to foster a work environment that espouses sustainable business practices and cultivates a culture of innovation, diversity, transparency, integrity, and commitment to the organization's mission and the communities it serves. As part of that goal, PCE strives to ensure its use of

vendors and suppliers who share its commitment to sustainable business and inclusionary practices.

To help ensure an inclusive set of vendors and suppliers, PCE's policy requires it to:

1. Strive to use local businesses and provide fair compensation in the purchase of services and supplies;
2. Proactively seek services from local businesses and from businesses that have been Green Business certified and/or are taking steps to protect the environment; and
3. Engage in efforts to reach diverse communities to ensure an inclusive pool of potential suppliers.

General Order 156 (GO 156) is a California Public Utilities Commission ruling that requires utility entities to procure at least 21.5% of their contracts with majority women-owned, minority-owned, disabled veteran-owned and LGBT-owned business enterprises' (WMDVLGBTBEs) in all categories. Qualified businesses become GO 156 Certified through the CPUC and are then added to the GO 156 Clearinghouse database. The CPUC Clearinghouse can be found here: www.thesupplierclearinghouse.com.

While PCE is not legally-required to comply with GO 156, PCE's policies and commitment to diversity are consistent with the principles of GO 156, and, therefore, respondents to this RFP are asked to voluntarily disclose their GO 156 certification status as well as their efforts to work with diverse business enterprises, including those owned or operated by women (WBE), minorities (MBE), disabled veterans (DVBE), and lesbian, gay, bisexual, or transgender people (LGBTBE).

As a public agency and consistent with state law, PCE will not use any such provided information in any part of its decision-making or selection process. Rather, PCE will use that information solely to help evaluate how well it is conforming to its own policies and goals.

Pursuant to California Proposition 209, PCE does not give preferential treatment based on race, sex, color, ethnicity, or national origin.

9 PCE Legal Obligations

PCE is not obligated to respond to any offer submitted as part of the RFP. All parties acknowledge that PCE is a public agency subject to the requirements of the California Public Records Act, Cal. Gov. Code section 6250 et seq. PCE acknowledges that another party may submit information to PCE that the other party considers confidential, proprietary, or trade secret information pursuant the Uniform Trade Secrets Act (Cal. Civ. Code section 3426 et seq.), or otherwise protected from disclosure pursuant to an exemption to the California Public Records Act (Government Code sections 6254 and 6255) ("Confidential Information"). Any such other party acknowledges that PCE may

submit to the other party Confidential Information. Any party submitting Confidential Information shall clearly mark such information as confidential.

Proposals submitted in response to this RFP are public documents. With the exception of any Confidential Information that is legally exempt from disclosure, PCE is obligated to disclose such proposals if requested (including by competitors). PCE will also disclose any winning proposal at a public meeting of the PCE Board of Directors.

Upon request or demand of any third person or entity not a party to this RFP ("Requestor") for production, inspection and/or copying of information designated as Confidential Information by a party disclosing such information ("Disclosing Party"), the party receiving such information ("Receiving Party"), as soon as practical but within three (3) business days of receipt of the request, shall notify the Disclosing Party that such request has been made, by telephone call, letter sent via email and/or by US Mail to the address or email address listed on the cover page of the RFP. The Disclosing Party shall be solely responsible for taking whatever legal steps are necessary to protect information deemed by it to be Confidential Information and to prevent release of information to the Requestor by the Receiving Party. If the Disclosing Party takes no such action, after receiving the foregoing notice from the Receiving Party, the Receiving Party shall be permitted to comply with the Requestor's demand and is not required to defend against it.

10 General Terms and Conditions

1. PCE's Reserved Rights: PCE may, at its sole discretion: withdraw this Request for Proposal at any time, and/or reject any or all materials submitted. Respondents are solely responsible for any costs or expenses incurred in connection with the preparation and submittal of the materials for this RFP.
2. Public Records: All documents submitted in response to this RFP will become the property of PCE upon submittal and will be subject to the provisions of the California Public Records Act and any other applicable disclosure laws.
3. No Guarantee of Contract: PCE makes no guarantee that a contractor and/ or firm added to the qualified vendor list will result in a contract.
4. Response is Genuine: By submitting a response pursuant to this RFP, Respondent certifies that this submission is genuine, and not sham or collusive, nor made in the interest or on behalf of any person not named therein; the submitting firm has not directly or indirectly induced or solicited any other submitting firm to put in a sham bid, or any other person, firm or corporation to refrain from submitting a submission, and the submitting firm has not in any manner sought by collusion to secure for themselves an advantage over any other submitting firm.

11 Detailed Project Description

See following page.

Detailed Project Description

1. Name of Proposal - Marketing Strategy Consulting

2. Project Objective

Peninsula Clean Energy (PCE) has grown significantly and evolved since its initial customer launch in October 2016. The PCE audience/customer base, totaling nearly 300,000 residential and commercial electricity customers within the 20 cities and towns of San Mateo County, is comprised of a broad, multi-cultural, very diverse demographic constituents. While its overall mission and strategic goals remain the same (i.e. to provide clean, renewable, greenhouse gas-free electricity to the residents of San Mateo County), PCE is now entering the next phase of company evolution.

The initial launch was focused on introduction of PCE's primary product, ECOplus (50% renewable), to residents/businesses and encouraging them to stay with PCE. That launch was highly successful having only 2.4% of the enrolled customers opting out of PCE's service offering. Now, we would like to develop a robust marketing strategy and determine what key objectives make sense as we expand our offerings.

PCE seeks a Consultant with experience and success in developing a marketing strategy for organizations like PCE that incorporates plans and actions as we evolve from a start-up organization to a more established organization. In collaboration with PCE's staff, the successful Consultant will help to develop a comprehensive 3-year marketing strategy and implementation plan targeted at:

- Electricity Product Mix:
 - Evaluating the value of working to boost voluntary participation in ECO100 product offering
 - Determining a strategy to transition our ECOplus product offering to an eventual 100% renewable offering no later than 2025
 - Determining a product differentiation strategy, if appropriate, for ECO100 as the transition of ECOplus to 100% renewable takes place
- Maximizing and maintaining customer participation with PCE, including maintaining low opt-out rates by new/existing customers
- Evaluating the value and possible approaches to increasing PCE brand awareness and customer loyalty
- New Program Offerings: Encouraging significant participation in multiple, far-reaching programs
 - Targeted for residential customers (e.g. EV rebates, building electrification)

- Targeted for commercial customers (e.g. installing workplace EV infrastructure, energy storage)
- Targeted for municipal and non-profit customers (e.g. installing workplace EV infrastructure, energy storage, microgrids, resilience)
- Implementing a robust PR strategy to inform stakeholders of PCE's activities, and to enhance local, regional, state, and national exposure
- Evaluation of existing community outreach/communication strategies and activities to determine needs for expansion or changes to meet the changing landscape of customer needs

The above objectives are expected to be met by activities and strategies in a variety of areas. Some key focus areas are as follows:

3. Sample Focus Areas and Open Questions

The following areas have been identified as important within the organization. However, PCE is also interested in the consultant's assessment and suggestions on what other areas of focus should be investigated in this marketing strategy development effort.

- Product Transition from ECOplus to ECO100

Increased participation in the ECO100 product by residential and commercial customers requires an active action to "opt-up" by each customer. The current participation rate is very low and represents an opportunity to make faster progress toward PCE's long-term environmental goals.

Success in increasing participation in the two large customer classes will require significant resources for promotional and marketing strategies. However, questions remain about the cost/benefit of investing significant PCE resources when the long-term goal is to deliver 100% renewable energy by 2025.

- Brand Awareness

Despite PCE's low opt-out rate of 2.4% and corresponding 97.6% market share, market research conducted a year ago indicated that only 3% of our customers could name PCE as an option for buying their electricity when not prompted. And, 44% were totally unaware of PCE.

Ensuring that more customers understand that PCE is a mission-driven, non-profit, public agency may increase trust and loyalty. However, questions remain about the optimal way(s) to deliver this message and

the cost-benefit implications of a broad, brand awareness campaign except in the context of other objectives.

- Residential Customers

- Customer Care

PCE desires to provide a superior customer experience for customer service. That service is largely provided to residential customers through a trained, outsourced call center to answer questions about electricity charges that also provides similar services to other CCAs. To date, very few customers have taken advantage of that call center for a variety of reasons including the lack of understanding about their electricity charges, limited knowledge by customers that PCE is their electricity provider, and lack of needs/questions for which services might be needed (e.g. programs).

Strategic questions remain as to what services that customer care will/should provide. Answers will drive how to best structure customer care/interaction including whether to bring such service in-house and/or whether to provide broader services (e.g. clean energy “lifestyle”) advice.

- Residential Energy Programs

PCE is developing a range of programs to advance the clean energy goals of PCE and the community. These include promoting electric vehicles, transitioning to electric appliances, implementing storage systems, and strategic energy efficiency programs.

While in most cases the product is well defined (EVs, storage, etc.), the approaches to successfully marketing and engaging residents can vary dramatically. However, an overall marketing strategy needs to be developed, including positioning, target markets, and PCE’s role as a trusted expert.

- Large Commercial Customers

Commercial customers are an important customer group comprising less than 10% of PCE’s overall customer base while generating approximately two-thirds of PCE’s annual electricity generation revenues. Given their operating nature, the electricity demand is more stable throughout the year and more predictable throughout the day.

As a result of the above dynamics, it is imperative to PCE's continued success to maintain these customers. Large customers have more options and ability to procure energy from other, direct sources. PCE has invested in staff to support the Top 100 customers by providing a direct contact and support for customer service. However, questions remain about how to best engage with such customers and how best to provide incentives/encouragement, program enhancements, and/or contract options to stay with and/or expand service with PCE over the long-term.

- PR Strategy

To raise awareness locally and regionally, PCE has engaged a PR consultant to reach the local, trade, and regional press. Regular press releases have been issued and a handful of organizations contact PCE for information. However, reference to PCE is not at the level it could be based on PCE's achievements to date. Enhanced strategies to better reach the larger community of stakeholders and industry press are needed.

- Community Outreach & Engagement

To help raise awareness among, and build trust and local community goodwill, PCE has participated in numerous community events where the general public already congregates. These informal opportunities have enabled PCE to connect with its constituents while raising PCE's awareness.

Participation in local, community-oriented events are believed to be important in spreading the word about PCE and its local, non-profit mission especially to low-income and non-English speaking constituent groups. PCE deepens relationships with community groups through outreach grants, sponsorships, and participation in regional environmental networks and coalitions of nonprofits to better inform and align PCE programs to increase effectiveness and build a sense of "community ownership" with PCE as a local, representative service provider. However, questions remain about the effort required and the overall brand awareness and loyalty that is generated versus other outreach efforts.

- Website and Social Media

PCE's website (www.PeninsulaCleanEnergy.com) will continue to serve as the central source of information for, and access to, PCE. All customer-facing materials distributed to date has and will continue to direct

customers to visit the website. Based on the very diverse customer demographics, web content (and print collateral) will continue to be provided in Spanish and Chinese translations.

PCE also dedicates resources to providing information about activities through social media (Facebook, Twitter, etc.). It is believed that these activities are reaching a large audience and helping to inform the community about PCE.

With priorities shifting to building trust, establishing legitimacy, and highlighting PCE as a non-profit organization with the community's best interest at heart, the website must reflect those priorities. However, given PCE's organizational evolution to a provider of innovative programs, questions remain about the effectiveness of the website and the brand message that is conveyed. Additionally, questions remain about the impact of social media and whether current approaches are achieving the desired outcome.

PCE Supplier Diversity Questionnaire (Optional)

Providing information in this questionnaire is optional. As a public agency and consistent with state law, PCE will not use any such provided information in any part of its decision-making or selection process.

Contact information:

Business Name	
Email address	
Phone number	
Where is your business located/headquartered?	

Labor Diversity:

1. Is your business certified under General Order 156 (GO 156)?

- Yes
- No
- Qualified as WMDVLGBTBEs, but not GO 156 Certified

If you answered either "Yes" or "Qualified" above, please choose all categories that apply below.

- Woman-owned
- Minority-owned
- Disabled Veteran-owned
- LGBT-owned

2. Does your business use subcontractors that are certified under GO 156?

- Yes
- No
- Qualified as WMDVLGBTBEs, but not GO 156 Certified

If you answered either "Yes" or "Qualified" above, please choose all categories that apply below.

- Woman-owned
- Minority-owned
- Disabled Veteran-owned
- LGBT-owned

3. Does your business have hiring targets of minority-owned, women-owned, LGBTQ-owned, or disabled veteran-owned subcontractors?

- Yes
- No
- Not applicable

Labor Agreements:

This section of questions focuses on the labor agreements of your business. If your business/contract with PCE does not have a labor component, please answer "not applicable."

1. Does your business have history of using local-hires, union labor, or multi-trade project labor agreements?

- Yes, within PCE's service area of San Mateo County
- Yes, CA-based labor, but not local to PCE's service area of San Mateo County
- No
- Not applicable

If you answered "Yes, within PCE's service area of San Mateo County" above, please provide the percentage of labor agreements with local, union, and multi-trade labor (if available) and describe past efforts.

If you answered "Yes, CA-based labor, but not local to PCE's service area of San Mateo County" above, from where in California is the labor sourced?

2. In your proposed contract with PCE, does your business plan to use local hires, union labor, or multi-trade project labor agreements?

- Yes
- No
- Not applicable

If you answered "Yes" above, please quantify the number of such labor agreements and explain.

3. Does your business pay workers prevailing wage rates or the equivalent?

Prevailing wage in California is required by state law for all workers employed on public works projects and determined by the California Department of Industrial Relations according to the type of work and location of the project. To see the latest prevailing wage rates, go to www.dir.ca.gov/Public-Works/Prevailing-Wage.html

- Yes
- No
- Not applicable

4. In your proposed contract with PCE, does your business pay and/or plan to pay prevailing wages or the equivalent?

To see the latest prevailing wage rates, go to www.dir.ca.gov/Public-Works/Prevailing-Wage.html

- Yes
- No
- Not applicable

5. Does your business support and/or use apprenticeship programs?

- Yes
- No
- Not applicable

If you answered "Yes" above, please describe the apprenticeship programs your business plans to use.

6. Does your business employ workers and/or use businesses from PCE's service area of San Mateo County?

- Yes
- No

If you answered "Yes" above, please quantify the number of workers/businesses, the businesses used, and in which communities the workers or business reside.

Equity, Diversity, Inclusion, and Environmental Justice:

PCE is committed to equity, diversity, inclusion, and environmental justice both within our organization and within our communities.

1. Does your business have initiatives to promote workplace diversity?

- Yes
- No

If you answered "Yes" above, please describe such initiatives or provide any supporting statistics or documentation for diversity within the business.

2. What other efforts related to equity, diversity, inclusion, or environmental justice does your business pursue?

3. If there is anything else related to supplier diversity that is not captured in your answers above, please describe below:
