



## REQUEST FOR PROPOSAL

Date: September 14, 2017

### Phase 1: Expanding Electric Car Awareness in California

#### Outreach, Education and Experiential Campaign for Electric Cars

## 1. INTRODUCTION

Veloz means fast. Fast like how the world is changing. And fast, like the pace at which we must make a significant shift to electric cars. Veloz is a new, California-based nonprofit organization that aims to power the electric car movement with an innovative, compelling public message. A message that is less instructional, prescriptive and “do gooder” and more about the fun, emotional and compelling benefits of driving electric. We don’t want to encourage people to buy electric cars because they should, we want them to buy electric cars because they’re just cooler and more exciting to own. It’s about driving the future. And it’s a message that can live in traditional, digital and experiential campaigns.

Veloz is powered by a unique combination of C-level executives from the major California utilities, global automakers, NGOs, Fortune 500 companies, state government, charging providers, community organizations and others working together to generate momentum for this new transportation platform. The Veloz Board of Directors and Public Policy Board represents these sectors. For a full list of our members, see page 10.

#### **BOARD OF DIRECTORS**

BMW  
General Motors  
Pacific Gas & Electric  
San Diego Gas & Electric  
Southern California Edison  
NextGen Policy Center  
Lyft  
Center for Sustainable Energy  
EVgo/Vision Ridge Partners  
Langleloth Foundation

#### **PUBLIC POLICY BOARD**

Air Resources Board  
Bay Area Air Quality Management District  
California Energy Commission  
Cal ISO  
Public Utilities Commission

California utilities and charging providers are building new energy systems that will power electric cars with renewable electricity. California has already proven to be the perfect place for automakers to launch electric cars, given its rare ecosystem of leadership, policy and culture. Through this unique public-private partnership platform, Veloz stitches together an uncommon alliance of key industry stakeholders and new partners to increase public awareness of electric cars. Veloz’s campaign will get consumers talking, testing, driving and riding.



The key to meeting California’s clean air, climate change, energy and economic goals is scaling up the number of electric cars on the road. California policies and advancements in electric car and charging technologies have energized the growth of the market. Since 2010 more than 300,000 electric cars have been sold or leased in California. There are now more than 30 electric makes and models available, with another 70 coming in the next five years that are more affordable, have longer ranges and offer faster refueling. The charging station network is also rapidly expanding, with more than 13,000 charging ports now in California. However, there is a gap between current sales and the governor’s goal of 1.5 million electric cars on the road and the infrastructure to support them by 2025, and research indicates that a majority of Californians lack awareness of the benefits of driving electric. Coupled with technology advancements, market demand will only increase if people know that electric cars exist and that they are a solid purchase choice. That is where Veloz and its statewide campaign comes in.

Working together, we need to move this market beyond the early adopters and into the mainstream, bringing electric car awareness to all Californians. We need to meet consumers where they are, show them the benefits of electric cars and inspire them to join the electric car revolution. Key metrics and reporting milestones will ensure our efforts are making a difference.

## **2. PROJECT OBJECTIVE**

This campaign should inspire car buyers to learn more about electric cars in order to ultimately increase consideration, understanding and purchase of this technology. The campaign needs to enhance and expand on existing efforts, including those of our members as well as the Veloz Best.Drive.EVer. ride-and-drive series. The campaign must capture and reflect the unique role Veloz has in this space as a nonprofit with a diverse membership base. Veloz’s role is to raise awareness of electric car technology as a category, to educate consumers about their choices and to lead them to pursue more information and ultimately buy, lease or choose electric cars as a mobility option. Finally, this campaign must be for all Californians and include messaging and strategies to reach multi-cultural, low-income and disadvantaged communities in our state.

Through this Request for Proposal (RFP), Veloz invites qualified strategic communications, public relations, advertising, social marketing and digital media firms to submit proposals for Phase 1 of a 2 Phase project. Below are descriptions of each Phase.

**Phase 1** has a \$200,000 budget and is for the development, testing and strategic planning of a brand-inclusive outreach campaign to increase consumer awareness, understanding and acceptance of electric cars in California. A portion of the campaign budget will be used to reach multi-cultural populations, low-income and disadvantaged communities and should be reflected in the deliverables as described in the scope of work.



**Phase 2** is expected to happen in the second quarter of 2018. The contractor awarded Phase 1 will be eligible for continuing to work with Veloz to complete Phase 2. The projected budget for Phase 2 is \$4 million; however, with memorable, eye-catching and successful creative and messaging, Veloz could secure additional investments to exponentially increase the reach and impact of Phase 2. Fundraising for Phase 2 will be done in parallel with the Phase 1 work.

Phase 2 will be for the creative execution, implementation, media planning and procurement, website development and overall rollout of the campaign using the deliverables in Phase 1. Phase 2 will involve managing and tailoring the campaign to have the most impact with the target audiences identified in Phase 1.

### **3. CONTRACTOR QUALIFICATIONS**

The contractor should have the following skills and experience:

1. Proven multi-brand campaign experience with successful results.
2. Ability to understand and crack the unique challenge of creating and implementing a campaign with multiple competing brands.
3. Ability to review and analyze existing research to determine the target audiences and stakeholders that need to be engaged.
4. Strong writing skills with the ability to distill technical information into easily understood material for target audiences.
5. Ability to develop out-of-the-box creative approaches to increase market penetration in an area with a lot of technical jargon and a lack of social acceptance.
6. Ability to develop multi-media outreach and communications plans that will have the highest impact for each dollar spent.
7. Ability to leverage existing or planned Veloz member outreach efforts and use those distribution channels to expand the reach of the Veloz campaign.
8. An understanding of California's car culture and the diverse regions of California and how a campaign may need to be tailored to meet the needs of these different regions.
9. An understanding of the unique needs of multi-cultural populations, low-income and disadvantaged communities, language preferences and creative approaches to reach these communities.
10. Proven demonstration of strong organizational skills and follow-through.
11. Strong ability to work professionally with a team.
12. Track record of delivering tasks with a top-tier quality, on time and within the agreed budget.

### **4. CAMPAIGN SCOPE OF WORK**

The details of each task are described below. The contractor will work closely with Veloz staff to meet budget and completion deadlines. All materials developed through this contract will include the Veloz logo or some text attributing the effort/campaign to Veloz,



and will be the property of Veloz. Use of any of the materials or deliverables created through this contract cannot be used by other entities without permission.

The contractor is expected to understand the tasks, timeline, audience, and final deliverables.

### **Task 1: Project Kick-Off**

The contractor will meet with the campaign steering committee that will include Veloz staff and a select team of Veloz members. The meeting will take place in-person or via teleconference to go over the project history, tasks and timeline. Following the kick-off meeting, the contractor will finalize a detailed schedule to include dates, tasks, deadlines and responsible parties.

### **Task 2: Define Success and Establish Metrics**

The contractor will work in partnership with the campaign steering committee to define what success looks like for this campaign. The contractor should define key outcomes and metrics for evaluating success at regular intervals throughout the campaign. This is a critical piece of the contract and will be an essential part of the campaign. Some key outcomes and metrics could include:

- Increased awareness and understanding of electric cars shown through pre- and post-surveys (phone and/or social media)
- Increased electric car sales in a certain region
- Increased traffic to campaign website
- Increased attendance at ride-and-drive events
- Increased news articles from mainstream media and in industry-specific outlets

### **Task 3: Survey Existing Market Research**

The contractor will review existing research to help determine the target audiences, prominent barriers and opportunities, and the key messages needed to increase awareness and understanding of electric cars. Once the contractor is hired, Veloz staff and the campaign steering committee will provide the contractor with copies of the existing research and resources to review for this task. The contractor is also encouraged to independently find resources beyond those provided to complete this task.

### **Task 4: Target Audience Development**

Following the research stage, the contractor will develop profiles for three target audience groups, barriers that exist for each group, a description of what each group values when buying a new car, and the types of messages that will help move these groups to consider an electric car.

The contractor should also rank the audience groups in order of importance so that we can determine the best strategies for spending the campaign dollars when we move to Phase 2.



### **Task 5: Messaging and Creative**

This should not be your usual electric car campaign. The contractor will develop big, bold messaging and creative that will resonate with the target audiences and be desirable for our members and other stakeholders to use through their distribution channels.

California has a unique car culture and is a leader in innovation and environmental policies. The branding, messaging and creative concepts should reflect this culture and leadership. It should also incorporate a way to appeal to the different geographic regions in California, including multi-cultural, low-income and disadvantaged communities.

The creative should incorporate a call to action such as getting consumers to test drive an electric car at ride-and-drive events or a dealership; talk to someone who drives an electric car; visit the campaign website to learn more about electric cars; and/or visit automaker and dealership websites to learn more about specific makes and models.

The contractor will present these concepts to the Board of Directors and the campaign steering committee for input before moving to the testing phase described below (Task 7).

### **Task 6: Campaign Branding and Visual Identity**

In conjunction with messaging and creative development, the contractor should develop branding for the campaign. In consultation with the campaign steering committee, the contractor will determine how the campaign should be perceived through its identity with the goal of moving the market forward. The branding should reflect the overarching core values of the campaign, including brand purpose, personality and promise.

Following approval of the campaign brand language, the contractor will create a complementary visual identity and logo package, including a guide for its consistent use. This task includes working with the Veloz campaign steering committee to facilitate selection of the final package.

A minimum of three (3) recommendations should be presented to the Veloz campaign steering committee in black and white and color, with recommended color palettes.

Once a visual identity is selected, the contractor will provide the following items:

- Scalable logo in color, and a black and white version
- Color palette
- Font guidelines
- Social media icon and header set (specifically for Twitter, Instagram and Facebook)
- Electronic newsletter masthead and footer



- Positioning statement
- Favicon
- Other associated visual elements

The contractor will facilitate the approval process and final selection of the visual identity package, logo and guide. With the final selection, the logo should be created in JPEG and EPS formats for use with Microsoft Word, MailChimp and InDesign. All files should be provided in low- and high-resolution formats.

The contractor will provide a brief narrative about the final recommendation and why it was chosen along with the associated use guidelines.

### **Task 7: Brand, Message and Creative Testing**

The contractor will develop and execute a testing plan to determine the effectiveness of the campaign branding, messaging and creative. The tests should include at least three geographical regions of California and have a mix of demographic profiles. The contractor must get the testing plan approved by Veloz staff before implementation. Results of the tests will be presented to the campaign steering committee in order to determine the concept that will move forward.

### **Task 8: Campaign Strategy and Rollout Plan**

The contractor will develop a campaign strategy and rollout plan with a \$4 million annual budget that is scalable if more dollars are available. The campaign strategy and rollout plan should include various media channels and platforms that will most effectively reach the target audiences, a strategy to reach multi-cultural, low-income and disadvantaged communities, and a timeline and budget. Consideration may be given to, but is not limited to, the following:

- Advertising
- Public relations
- Social and digital media
- VIP influencers
- Website development
- Experiential opportunities – putting drivers behind the wheel
- Campaign events
- Opportunities for collaborations and partnerships
- Use of key stakeholder's distribution channels to amplify our message

### **Task 9: Paid and Earned Media Plan**

The contractor will develop a media plan and budget that includes, but is not limited to:

- Identification of target news media
- Strategies for reaching target audiences through news media outlets
- Ranking of news media outlets and related strategies by effectiveness



- Reach geographically and economically diverse target audiences through earned and paid media
- Speaker kits with key messages

#### **Task 10: Participate in and Track Meetings**

The contractor must participate in routine meetings with Veloz staff and the campaign steering committee; the frequency and length of these meetings will be determined jointly between the contractor and the Veloz contract manager. The contractor must also attend and provide a status update at one Board of Directors meeting and one Veloz member meeting in 2018. Further, the contractor must take appropriate meeting notes, track deadlines and provide status reports to Veloz staff and its members.

#### **Task 11: Final Report and Plan**

The contractor will provide Veloz with a final, professional executive-level report for its members and should include the following items:

- ✓ Overall project goals
- ✓ Description of the findings from the review of existing research
- ✓ Description and ranking of the target audiences, barriers, key considerations and messages that will resonate with these audiences
- ✓ Creative concepts explored
- ✓ Creative and message testing plan
- ✓ Creative and message testing results and conclusions
- ✓ Recommended creative and messaging for a successful campaign with rationale for this decision
- ✓ Description of campaign branding and visual identity and why it was chosen
- ✓ Rollout strategy and plan, including recommended media platforms, budget and timeline
- ✓ Description of paid and earned media plan budget and timeline
- ✓ Definition of campaign success and the metrics that will be used to track success overtime
- ✓ Recommended next steps

## **5. BUDGET AND TIMELINE**

Veloz has allocated \$200,000 for Phase 1 of the campaign. Veloz staff's travel costs will come from a separate budget. Services billed should not exceed the amount allocated for this project. The contractor will be paid 50 percent (\$100,000) of the total budget upon execution of the contract and 50 percent (\$100,000) upon completion of the full Scope of Work outlined in the contract. We do have flexibility in the payment schedule and final determination will be mutually agreed upon during contracting.



We expect the time required of the contractor should be somewhat flexible during this time period, reflecting the status of work required. The contractor will ensure that work is completed in a timely manner and does not get pushed to the end of the project. To this end, we will develop and monitor mutually agreed upon deadlines.

#### **Timeline:**

- This RFP is dated September 14, 2017.
- Veloz will hold a pre-bidders webinar on Thursday, September 28, 2017, at 11 a.m. (PDT).
  - In order to have your questions answered during the webinar, please email them to Lisa Childakis at [Lisa.Chiladakis@veloz.org](mailto:Lisa.Chiladakis@veloz.org) by 5 p.m. (PDT), Monday, September 25, 2017. Veloz will also take clarifying questions during the webinar.
  - In order to receive information to register for the webinar, please email Lisa Chiladakis by 5 p.m. (PDT), Wednesday, September 27, 2017.
  - A record of the webinar will be posted to Veloz.com by Tuesday, October 3, 2017.
  - Please note that interested parties may bid on this project even if they do not register or attend the pre-bidders webinar.
- **Proposals are due no later than 5 p.m. (PDT), Thursday, October 26, 2017 and must be emailed to Lisa Childakis at [Lisa.Chiladakis@veloz.org](mailto:Lisa.Chiladakis@veloz.org)**
- The campaign steering committee will select up to three bidders for an in-person meeting in Sacramento. The in-person meeting will be for the purpose of clarifying the proposals and will involve a presentation that expands upon the challenge described below in Section 6. This in-person meeting will be held the week of November 13, 2017.
- A contractor will be selected by Friday, December 1, 2017.
- The project start date will be December 14, 2017.
- Final deliverables will be due by May 4, 2018.

## **6. PROPOSAL REQUIREMENTS**

The completed proposal must contain the following information and be a maximum of fifteen (15) single-sided pages:

- Cover letter
- Table of contents
- Statement of work outlining how the contractor will fulfill each task, including any subcontractors and staff
- Narrative about how the contractor meets the qualifications described in Section 3
- Proposed initial schedule
- Primary contractor and subcontractor qualifications and experiences including a minimum of two (2) case studies
- Description of work done for any Veloz member organizations
- Description of team members and roles





- Cost proposal
- A minimum of three (3) references
- Challenge (up to one page per idea): Include two (2) ideas to show how you would engage someone that meets the characteristics of a potential electric car buyer and the media platforms you would use to encourage a call to action. This is not intended to be the full campaign or the final product, but rather something creative you can share with us.

## **7. PROPOSAL REVIEW PROCESS**

A review committee will evaluate proposals for each project based on the following criteria and weighting:

### **100 total points possible:**

- 20 Understanding the problem
- 20 Approach to completing each task
- 20 Contractor qualifications
- 20 Previous experience
- 10 Challenge response
- 10 Cost

## **8. VELOZ CONTACT**

Please contact Lisa Chiladakis, Manager, Technology & Programs, Veloz, at (916) 327-2932 or at [Lisa.Chiladakis@veloz.org](mailto:Lisa.Chiladakis@veloz.org) with any questions. Proposals will only be accepted via email at [Lisa.Chiladakis@veloz.org](mailto:Lisa.Chiladakis@veloz.org).

# VELOZ

## VELOZ MEMBERS



California ISO

BMW Group



SUBARU



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California Environmental Protection Agency  
Air Resources Board



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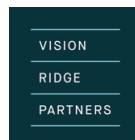
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