

Silicon Valley Clean Energy
2025 Communications & Marketing Services RFP
Q&A

1. What is the name of the current/ most recent vendor providing these services?

School of Thought for advertising campaign support, DataSpaceDigital for analytics services, Creative F5 for web and graphic design.

2. What is the last monetary amount awarded for these services?

The School of Thought contract is a total not-to-exceed of \$530,000 for services from 2022 through 2026. This includes \$155k for ad buys for only two of the marquee campaigns they are supporting. Other ad spends were paid directly by SVCE and not through this contract.

3. What is your aided and unaided awareness? Do you know if PG&E trying to capture any of your keywords?

Unaided around 10%, aided awareness approximately 72%. Don't have a sense that PG&E is capturing any of our keywords. We are doing quite a bit of keyword targeting with our ads.

4. What is the budget for the project and potential media spend? Is there a separate PR budget?

\$250,000 is our budgeted amount per contract, which we plan to initially set for two years. This timing and the budget are dependent on the selected vendor and mutually agreed upon scope of work. This contract amount excludes media buys. We are seeking reasonable hourly rates and to maximize the investment we are making with a partner who can make efficient use of funds. We also request contracts to be on a time and materials basis.

The total SVCE budget for programs marketing is around \$500k annually, general awareness marketing \$100-120k. Marketing vendor hourly rates are key here for the holistic budget for what a bidder might propose. Individual large campaigns that are highly complex have run as high as \$40-50k for development, and \$100-150k for the ad spend. There is flexibility here in the total proposed budget as it is currently budget season for SVCE, so the subsequent contracting process with selected bidder will help inform the budget ask for marketing in the next fiscal year. We're looking for effective delivery, cost-effective development, and a good use of ratepayer funds. None of our previous contracts has the same high-level scope as this new Communications and Marketing Services RFP, so the costs of individual large-scale campaigns may not be particularly helpful context.

5. How will the cost portion of the proposals be evaluated?

Cost is not the final deciding factor, but it is one of several key considerations for the SVCE evaluation team.

6. Is there a specific format or form bidders should follow for the cost proposal?

A simple table is sufficient. The information should include roles, hourly rates for each member of the team, and projected time spent across the different activities under the tasks, as well as the time it takes your firm to develop a single campaign (and share specifics on the sample campaign).

7. Can you describe the open rates of your existing customer-facing messaging?

We typically see a 50% average open rate across all our campaigns.

8. What has prompted the release of this RFP? Is there an incumbent and are you satisfied with their work? Any specific services/capabilities you are especially looking to add through this RFP? Will they be participating in this RFP?

The prompt is that we need the help as our programs and initiatives have hit critical mass with more to come! We do not have an incumbent agency offering these full services that we are seeking.

9. From the board or internally, is there a cost per lead or cost per conversion threshold?

Flexibility here, depending on the program, costs vary. We are currently in the process of setting up Looker tables to track and calculate current costs, which will help set a baseline. These are all determined internally, and not by our board.

10. Question on website scope. I know there is a redesign involved, where will website be hosted?

Website hosting will be done by SVCE with current hosts, SVCE has some in-house web specialists and want ultimate flexibility that we can control. Currently on WordPress and would prefer to stick with that framework, but open to alternatives. Looking for help with design and optimizing the customer experience/journey of our website.

11. Who has been particularly difficult to engage with?

Low-income customers and customers where energy is not top of mind. Spanish language focus and multilingual marketing is an area we're building. For strategic communications and media relations needs, we would like to do more to get our news in front of policy makers and showcase how we are helping to advance solutions for the state's electrification goals.

12. What technologies make up your marketing stack?

- a. CRM
 - i. Salesforce for programs
- b. Content Management System
 - i. WordPress
- c. Email Marketing
 - i. GovDelivery - transitioning to customer.io (warm up starts June)
- d. Social media (e.g., Sprout, Hootsuite, etc.)
 - i. SocialChamp
- e. Digital Asset Management (e.g. Bynder, Box, Dropbox, Google, Sharepoint, etc.)
 - i. Use Box but not primary DAM, we are looking into one
- f. Ad Accounts (e.g. Google, Meta, etc.)?
 - i. Google Ads
 - ii. Meta
 - iii. LinkedIn
 - iv. Nextdoor
 - v. AudioGo
- g. What about Google Ads, Search Console, other?
 - i. This is answered above, yes we have Search Console.
- h. Incentive Finder & Appliance Marketplace
 - i. Bellawatt
- i. Analytics
 - i. Do you use a dashboard tool for data visualization? If so what, and how do you use it?
 - i. We are configured to GA4, setting up Looker dashboards now to combine data by program and for overall portfolio.
 - ii. Any other analytics tools being used to measure and report on performance?
 - i. HotJar, SmartLook, Facebook Pixel
 - iii. Any attribution issues?
 - i. Uncertain, most likely a thorough review is good.

13. Have you already gathered, documented and prioritized website requirements? Does it make sense to start here as the outcome will dictate the website refresh strategy, timeline and budget? It is hard to estimate the cost of the website refresh without knowing requirements.

No, this is in progress, but we would want our selected vendor to assist with this process.

14. Does SVCE have a documented organic social media strategy?

Yes.

15. The RFP states the work will be on an ongoing basis. With the amount of services and deliverables requested in this RFP we must assume work will be ongoing, requiring a retained relationship. Is SVCE prepared to retain the selected agency partner and pay monthly retainer?

SVCE does not typically work with vendors on a retainer basis; our preference is time and materials. We are open to exploring other options during contract discussions with a selected firm(s).

16. Regarding content for 2025 for both the site and social, have you completed the following:

- a. Keyword analysis (with pillars and clusters)
 - i. Not in this manner, we do conduct keyword research for search-based ads and blog topics, etc.
- b. Content strategy
 - i. Yes
- c. Content calendar
 - i. Yes

17. Regarding imagery, infographics and video, is it correct for us to assume the majority of your available assets are stock and that there isn't currently a budget set aside for photo/video shoots?

No, we have significant internally produced assets and are consistently adding to our library.

18. Do you do photo and video shoots often? How often?

We have a contracted videographer/photographer, and we shoot as needed when events and programs are being planned.

19. Do you have a dedicated social media person that does paid, organic and customer/community management?

No, not dedicated but we do handle our social media in house.

20. Is there a 2025 marketing plan that we will follow for the remainder of the year?

Yes, and we are flexible, so this can be subject to change and shaped with the right partner vendor.

21. Are there programs acquisition goals and KPI's, including cost to acquire targets?

Yes.

22. Should we plan on writing a first draft of the 2026 marketing plan or is that something you do internally?

We are open to this being part of the proposed scope of work, and it would likely be done in conjunction with our five-person strong marketing team.

23. Do you have a person internally that will optimize paid search and traffic/flight ads or do we need to take care of all media needs?

This contract will require the vendor to conduct this for certain programs/as requested. We also do this internally within our marketing team.

24. For the website redesign, do you have in-house content creators (e.g. copy writing, graphic design) or should we plan on using our people for all site needs?

We'd like copywriting support and design (graphic, UI/UX) support in particular.

25. What are the high-level milestones or program-specific KPI's (e.g. number of rebates distributed for X or unaided awareness lift of 10%) do you want to achieve in 2025 and H1 2026 that will impact the strategic roadmap?

We have program-specific KPIs, and given that we have approx. 40 programs, it is too much to list here, and this information will be shared in the contracting and onboarding process with the selected vendor as needed for the specific programs where we are seeking marketing support, as we are not looking for support on all 40 programs. For example, one target for this year was to process 300 income-qualified EV rebates. You can review the latest quarterly programs report in the [May board meeting packet](#), page 96, which shares some of the program goals.

26. What eHub platform integrations—besides Bellawatt would we need to consider as part of the website development? And would optimization of existing platforms based on early pilot data be a part of the projected scope?

It's possible Salesforce could be more directly integrated. We also have a separate vendor running our Go Electric Advisor service and microsite at goelectric.svcleanenergy.org. Other integrations are done via iFrames for customer transactions with our service.

27. What is the vision and timeline for expanding services or diversifying website integrations to enhance the customer experience—if any?

Flexible based on proposal, there are no specific new integrations planned at this time since we recently updated our eHub suite of resources. We are looking for more general website support in making sure the information we present and related to our core functions are clear and impactful. Other program webpages can be evaluated, improved or need to be created as new initiatives launch.

28. Is SVCE on standard calendar year (Jan-Dec) or another calendar year?

SVCE is on an Oct. 1 – Sept. 30 fiscal year.

29. What about CBOs, how do those fit within this Marketing/PR Services scope?

SVCE will be managing these relationships directly.

30. Do folks know who SVCE is and where their power comes from?

We have seen a consistent measurement of ~10% unaided awareness, with 72% aided awareness. We're out at many events all year, usually there is a positive association with our mission of clean power that typically costs less.

31. Approximately 25k of your customers are CARE/FERA. To help develop a tailored strategic MKT approach for each program, will you be sharing audience data for your existing programs? Or would conducting that demographic analysis fall under the scope of the requested services?

We have a data team internally and already own significant information about our customers. That team is wrapping up a segmentation process to help with targeting for different programs. We could continue gathering more data as needed, e.g., we don't have good income data.

32. If you don't do a full website rebuild, will you want support for website UI/UX support?

Yes.

33. Are you using anyone for segmentation like Blastpoint or Arturo?

Not currently, but there is some internal interest. Nothing is planned at this time.

34. Talking about narrative and storytelling you've done, pain points of education in front of policymakers, also getting programs to income-qualified customers, any other major barriers?

Primarily it's internal bandwidth limitations. But also, this is a very technical field and we are doing so much, we need help with refinement.

35. Relationship with customer affairs group.

The communications team meets with our public affairs group regularly. For example, there is money available to jurisdictions to help them with policy creation, support infrastructure projects, so the SVCE communications team assists with deploying these services. Our needs vary based on the volume of work, and much of it has been related to building standards recently. No internal friction, everyone is passionate about our mission and excited about this new bandwidth coming to support both teams.

36. Where are you with brand itself?

- **Here are some of the core elements we're referring to:**
 - **Positioning or Job to be Done**
 - **Unique selling propositions**
 - **Character**
 - **Claim**
 - **Vision**
 - **Mission**
 - **Message platform (core message points, executive talking points, voice, tone, press boilerplate)**

We are in a good position on these items with a lot of time and effort already spent on this with internal alignment, so we are not looking to update any of these immediately. We are very open to learning and evolving, determining in partnership how to crack the nut of program marketing to increase adoption. Core elements are already established here and do not need time allotted.

37. Preference or desire for local vendor? Is an out-of-state vendor required to register as a business entity in California for the purposes of this contract, or will a standard state registration suffice? Will SVCE provide preference/points for any of the following: local firms, small businesses, and/or DBEs?

There are no requirements for local vendors or contracting with DBEs (as a government agency we are prohibited by law from selecting vendors based on their DBE status). However, given the nature of our work in the local community, we have a preference for local (Bay Area and Northern CA) as there are real benefits from the proximity, like a deep understanding of the media market or local policies and government. Qualified bidders ideally will have a good understanding of the California energy landscape and major players in the building decarbonization and transportation electrification spaces.

38. From an experiential standpoint, what are some of the program agnostic success metrics or milestones that you're driving towards near-term i.e. reach, adoption, and advocacy?

The goal is for us to hand over some of our more straightforward programs' marketing to a selected partner. Our aim is to reduce friction, make our offerings attractive, straightforward, improve awareness (gauged through annual surveys) and increase program adoption to help us meet our participation goals for both residential and commercial programs. Our ultimate goal is for our program participants to become advocates for electrification!

39. What percent of programs are managed by SVCE vs. Implementors?

Our programs are managed and overseen by our program staff, and most are run by third-party implementors from an administration standpoint, and the SVCE marketing and communications team handles the majority of marketing.

40. Do you have a community advisory committee you work closely with?

No, we had an ad-hoc group early on to shape our residential program offers. We run an informal, quarterly community leaders meeting with representatives from various local environmental advocacy organizations.

41. From an experiential standpoint, what are some of the program agnostic success metrics or milestones that you're driving towards near-term i.e. reach, adoption, and advocacy?

See answer to question 38.

42. Does the company have an AI policy and is the company excited to work with AI or not?

We do not yet have an AI policy but our IT team is working on one. We expect to have one by end of year.

43. What is the maturity/expertise level with marketing and lead generation of your marketing department, programs team, and most other key departments at the agency?

Mature and qualified. Team leadership has 15 – 20 years of experience.

44. What does your audience segmentation look like? How would you rank SVCE's audiences in terms of importance? Are there any groups that have been particularly hard to reach?

We have personas developed to inform messaging to different customer types, and the SVCE data team recently ran an analysis with Opinion Dynamics that offers customer segmentation based on energy usage and propensity to participate in programs. We're intentional with how we segment for our individual program marketing using tools like DMV data, customer rate plans, and more. We've had trouble finding solid income data that is more granular than the census block level.

45. Do you have the data to target deeper? Does SVCE possess current market research data on SVCE's target audience (e.g., perceptions, beliefs, opinions on electrification, awareness of SVCE, competitive insights)?

SVCE has data from its annual customer survey, which includes perceptions and opinions on electrification. See answer above for a recent analysis that now offers some propensity scores for program fit. We would like to go deeper, and therefore, market research is called out in the RFP for bidders to address.

46. What is the desired role your marketing team will play in the relationship vs what you expect from your agency partner?

The SVCE marketing team will manage Task B work with the selected partner and build the strategy together. The marketing team will request the partner to execute marketing for certain select programs from start to finish, in addition to one-off campaigns, journey and messaging development, planning support, and other pieces of the Task as described in the RFP.

47. RFP Section 5, page 5: The RFP indicates that bidders can submit both a word version and PPT slides for each task. Can the PPT slides serve as a way to expand upon what is written in the 10 pages of a word document? In other words, can we use both formats as we see fit?

Yes.

48. RFP Section 6, page 6 indicates the offeror must demonstrate financial viability. How would you like us to demonstrate/show proof of our financial viability?

Per the RFP: Provide, if available, current audited Financial Statements, credit rating reports from S&P Global Ratings and/or Fitch and/or Moody's. Any information about revenues, number of clients, etc. is helpful in assessing whether we can count on the bidder to stay in business throughout the contract duration.

- 49. RFP Section 17, page 12: The RFP states, "Walk us through your campaign development process from strategy, to targeting, to messaging, to creative development to tracking and reporting." Is this how you would like us to approach section 4 (as described on page 5?)**

Yes, include this in a portion of your proposed solution (section 4).

- 50. RFP Section 17, Task B: Please confirm if you would like four iterations of videography and photography (meaning four separate shoots), or if the intention to do one photo/video shoot and create four videos based on that shoot?**

One video/photo shoot would be most typical, adapting that shoot in combination with creative copy to develop content for 3-6 platforms (could be a variety of video cuts, static images to support ads, Reels, plus visuals to accompany audio ads and script development, etc.).

- 51. RFP Section 17, Task B: Should we include in our budget airing TV ads (which are listed as possible in the Scope of Work)?**

Ad spend will be independent of the proposed budgets from bidders.

- 52. RFP Section 17. Task B: Should we include the budget for the website redesign as an optional task?**

Yes, that's fine.

- 53. Which programs or initiatives (e.g., eHub 2.0, Go Electric Advisor, GridShift) are expected to be prioritized in Year 1 of the contract? Will SVCE provide performance benchmarks for past campaigns?**

Year 1 we expect campaigns that focus on our suite of Home Upgrades pathways, as possibly focusing on one, and bringing people to our eHub or specific tools within eHub likely the Incentives Finder. Yes, we will provide performance benchmarks if there is a relevant one available for the selected program, many of these programs are new.

- 54. Is it possible to submit a proposal solely for the "Task A – Communications Support" portion of the scope, or are you looking for a single firm to execute the entire scope? If the former, can you provide any budget guidance for that portion of the work? Even a budget range would be helpful to ensure what we propose matches the resources available.**

Yes, a firm can submit for Task A, Task B, or both. See budget answer in question #4.

- 55. Can you share a bit more about the "as-needed" and "ongoing" nature of the work, as noted in the RFP's timing section? We typically work on a monthly retainer model, which allows us to execute a continuous, ongoing media effort, without reverting to a narrow scope of hours. Is this structure acceptable?**

See answers to questions 4 and 15.

56. Are there any milestones or major announcements that you anticipate over the course of the engagement?

We cannot list all of them at this time, as many of these are yet to be determined. One that will happen for sure is the SVCE 10-year anniversary in April 2027. Otherwise, there are expected new programs and initiatives that will launch over the course of the engagement. Otherwise, a large part of the expected work is to support day-to-day needs of the agency to promote its customer offers and services.

57. Could we request an extension to the submission deadline?

No, we will not extend the submission deadline, unless not enough bids are received. There is high interest.

58. Under the RFP overview (page 3), it states: "SVCE reserves the right to award work for different Tasks or deliverables within Tasks to different Bidders, to not award work for one or more Tasks or underlying deliverables, or to award work to no Bidders." However, in the High Level Scope of Work section (page 9), it states that "SVCE seeks a full-service creative agency to develop marketing and messaging strategy, and execute marketing and communications campaigns that assist with customer inspiration, education, and clean energy awareness for electrification and decarbonization." Can you please clarify the circumstances under which SVCE would award a contract to more than one firm?

SVCE reserves the right to look at scores for individual tasks, combined tasks, and/or individual deliverables to make a determination on final awardees. For example, if the review panel determines that the strongest bidders for communications support is one that differs from our marketing needs, we could award two contracts to two separate firms.

59. For the website task, is the successful bidder required to have access to all the listed data reporting tools (Salesforce, GA4, HotJar/SmartLook, Meta, Google Ads, audio ads platforms, and email marketing platform), or are those simply examples of reporting tools SVCE is aware of or has used previously?

The successful bidder will be given access to necessary tools and can propose alternatives if/when needed.

60. For the Customer and Market Research, should bidders propose a research vendor to carry out these tasks, or does SVCE already have an existing vendor in place for this work?

SVCE would look forward to proposed research vendors within proposals.

61. Can you please clarify how proposals will be evaluated, e.g., the scoring criteria and points available for each one?

Please refer to section 6 of the RFP. For the purposes of this RFP, particularly for marketing, creativity will be a factor in the evaluation process. Understanding of the electrification challenge will also be considered.

62. Will this contract be awarded to a single firm or multiple firms? If the contract is awarded to multiple firms, will there be competition at the task level, or will SVCE award tasks individually to firms?

See answer to question 58.

63. Regarding obtaining certification through CPUC's Supplier Diversity Clearinghouse, do we have to register if we are already (currently) SBA 8(a) certified?

See answer to question 37.

64. Regarding the bidder's responsibility to contact SVCE to ascertain if any addenda have been issued, will SVCE send email notification to bidders or provide a link to any changes made to the solicitation?

If addenda are added to the solicitation, it will be posted to the website. We do not have an email interest list specific to this solicitation, so it is the responsibility of interested parties to check the solicitation posting.

65. Can you speak more about your expected outcomes for the electrification and decarbonization marketing efforts?

The outcomes are a comprehensive strategy for the partner to support, a robust customer journey development process, program marketing for select programs executed by the partner, and meet or exceed program participation goals, to ensure seamless analytics across all programs and channels, and to increase the adoption of electric equipment in our service territory.

66. To enhance clean energy awareness, what specific behaviors or actions do you aim to influence?

We aim to increase the adoption of energy-efficient electric equipment for space heating/cooling, water heating, cooking and transportation. We also aim to educate customers about the benefits to their safety, health, comfort and community of doing so. We also strive to share rate options that may be most beneficial for customers to support the adoption of said equipment and increase the ROI.

67. Media Relations

a. Does SVCE possess a list of local, regional, state and industry media outlets and contacts or will the contractor need to provide these?

- o Yes, SVCE has all of these contacts, but may need assistance with some regional and state media, should they be desired for specific projects.

b. What are the preferred platforms and formats for media relations and earned media efforts?

- SVCE has a media monitoring service and we do not typically utilize the wire for releases and most news is hyper-local, regional or targeted to specific industry trade publications.
- c. **Which local, regional, state, or industry media outlets best align with SVCE's goals for promoting its impacts?**
 - Examples include all local papers that serve specific cities in our jurisdiction, e.g. Los Altos Town Crier, Mountain View Voice, Morgan Hill Times, Gilroy Dispatch, etc. We are interested in broadcast and radio coverage as well. Industry publications include Utility Dive and Canary Media. The SVCE communications team has good relationships and contacts at many of these publications.
- d. **Can you provide a few examples of your ideal publication for media relations?**
 - Examples include – San Jose Mercury News, SF Chronicle, SacBee, CalMatters, Politico, Bay Area broadcast stations.

68. Does SVCE possess a list of the prospective customers/audiences for conducting surveys, polling and focus groups or will the contractor need to provide these?

Yes, SVCE has a list of its customers for polling, surveys, and focus groups.

69. Could you elaborate on the type of customer insights that have been most valuable in the past?

The annual customer survey, customer data such as rate plans, focus groups and user testing have been very valuable.

70. RFP Section 17, Task A: What type of customer research and insights are you envisioning for this task? Is this customer research intended to be separate from the research noted in Task B?

Task A's (Communications) customer research may differ from Task B (Marketing) but could be performed by the same vendor/sub. Task A research is likely to be more quick polling and focus groups to test messaging. For Task B, there may be specific programs and research around drivers for electrification adoption, surveys of all customers, or focus groups to determine improvements for strategy and creative.

71. Does SVCE currently have personas, journey maps, and messages developed, or will the contractor need to develop these for the first time?

SVCE has personas, journey maps and messaging strategy; review would be helpful.

72. Can you provide more details on the specific metrics/KPIs used to evaluate the success of the marketing and communications campaigns?

We're in the process of improving visibility into our cost per customer acquisition for individual programs and across the portfolio. We are also building Looker dashboards that combine metrics across different channels to better understand performance. The selected vendor can continue to help us refine this tracking and analysis.

73. Does SVCE currently have data (or access to) on socioeconomic circumstances and needs, e.g., income level, type of residence (renter vs. owner), education level, primary language spoken, etc., or will the contractor need to identify these?

SVCE has data, but it is not granular for some of these indicators. We do look at the Socioeconomic Vulnerability Index as one equity metric, but this only goes to the census tract level.

74. Are there any specific regulatory or legislative audiences that we should prioritize in our communications strategy?

This will be determined on a case-by-case basis, per project, but in general, we are looking to improve storytelling and showcasing SVCE's impact to key legislators in Sacramento and commissioners and staff at the CPUC and CEC.

75. What are the key challenges SVCE has faced in previous marketing and communications campaigns?

Targeting data, conversion tracking configuration, landing page design, campaign optimization frequency, timing and results.

76. Does SVCE have an annual advertising budget (or range) from past years or a projected budget for this contract period of performance for the media buys?

See answer to question #4.

77. Can you provide examples of successful past campaigns that align with SVCE's objectives?

Please see these examples of videos, which each had corresponding digital display, print and/or out of home ads that accompanied the campaign concepts.

- i. [Power Squad](#)
- ii. [Match](#)
- iii. [Be in the Know](#)

78. Is SVCE open to using a Drupal Content Management System hosted on AWS or does SVCE have self-service maintenance needs and is familiar with WordPress with Elementor?

SVCE prefers WordPress, open to others, but requires self-serve update and maintenance abilities (at the same level as available through a standard WP theme).

79. Exhibit A: Scope of Services

What is being asked on this page? The directions state, "[Click here to enter text.](#)" Please provide instructions.

- o Per the RFP, this is a copy of the standard SVCE terms, and it states at the top of this section: "This is included for review according to section 8. This is not to be completed by bidders." **Do not complete this section.**

80. Exhibit B: Schedule of Performance

- What is being asked on this page? The directions state, "[Click here to enter text.](#)" Please provide instructions.
- Do bidders need to use the form provided on the RFP or can/should we create a separate document to address the requirements in this Exhibit?
 - See answer to question 79.

81. Exhibit B: Schedule of Performance

- Do bidders need to use the form provided on the RFP or can/should we create a separate document to address the requirements in this Exhibit?
 - Per the RFP, this is a copy of our standard terms, and it states at the top of this section: "This is included for review according to section 8. This is not to be completed by bidders." ***Do not complete this section.***

82. How will the "financial viability" of the bidder be determined as part of the selection process?

See answer to question 48.

83. How will SVCE determine if a bidder is able to meet "any required timelines or other requirements" as part of its selection process? How should a bidder demonstrate this requirement?

The bidder should provide examples of their campaign development or work process with their clients. Take us through how you approach your work, including example timelines. For communications specifically, please indicate flexibility and ability to quickly respond to urgent items, such as spot-hitting on op-eds, coordinating press events, etc.

84. Will the pre-proposal webinar materials be made available for firms who were unable to attend?

This has been uploaded to the solicitation webpage.

85. Will the chosen vendor be responsible for deploying email campaigns for SVCE? If so, what is the total number of emails deployed within a year?

SVCE will likely remain in control of all emails, but the selected vendor will be expected to draft email content for relevant marketing campaigns and help with email journey strategy (drip campaigns/automations/tracking configuration within analytics tools that inform these).

86. Will SVCE be providing customer data to the vendor for use in lead generation, whether this is email, direct mail, etc., where specific targeting can take place?

It is unlikely that SVCE will share customer data with the selected vendors. As an energy agency, this is confidential information, but it could be discussed during the contracting process and the selected vendor would be required to meet all SVCE data security and cyber insurance requirements.

87. Does SVCE have a preferred translation vendor?

Yes, SVCE has an existing translation vendor and platform for online translations (Weglot).

88. Will SVCE give access to the vendor to post social media and google ads on their behalf?

Yes.

89. Aside from eHub, are there other third-party tools or services (e.g., payment platforms, contractor finders, translation engines) that need to be accounted for in a website refresh?

See answer to question 26.

90. Should the full website refresh include any backend restructuring (e.g., content model, taxonomy, API integrations), or is the focus primarily on front-end design and UX enhancements?

Mostly front-end design and UX enhancements, open to recommendations if any opportunities are found, but we have no known issues with the structure now.

91. Could you please provide a list of all 3rd party plugins or API calls currently being used that are must-haves in the new site?

Plug-ins we expect to continue using with the refreshed site: SEO, Weglot (language tool), ADA tool.

92. Would SVCE be open to a new site designed and developed in Webflow rather than WordPress?

It must be easily usable and updateable by internal SVCE staff. If Webflow satisfies this, open to the recommendation.

93. To what extent might we be able to have access to internal and external stakeholders for the discovery process?

This would be allowed and would be mutually agreed upon and coordinated with the staff.

94. We noticed other organizations such as San Jose Clean Energy competing for keywords and SEO juice. Given the collaborative nature of the CCAs, might there be an opportunity to share web and SEO goals across the network?

CCAs meet to discuss marketing efforts. There may be an opportunity to meet with any CCAs accidentally targeting customers within SVCE's service area, but no one is intentionally doing so as our customers are mutually exclusive.

95. We see that the current site has 12 accessibility errors and 29 alerts. Should we consider WCAG 2.2 AA as the desired level of accessibility going forward?

Yes, we're currently working to ensure we are meeting all accessibility requirements, especially those that are mandated as a public agency, and we expect the selected vendor to be well-versed in these requirements.

96. Will SVCE be providing updated content (text, media, metadata) for the website refresh, or is the selected partner expected to revise, migrate, or rewrite existing content?

We are seeking the strategic communications and marketing vendor to assist with copywriting.

97. How much of the current content needs to come over with the new site? Can there be a culling process where we trim to only the most effective content and start more fresh?

We are obligated to provide certain core functions and information, but we are open to revisiting existing pages for marketing-related purposes.

98. Does SVCE currently use a design system or component library for digital assets? If not, would you like us to propose one as part of the website refresh?

We currently use Box, but don't have a system like Bynder on top of it. We'd be happy to have this proposed as part of the website refresh.

99. Should we include any rebranding as part of the proposal?

No.

100. SVCE's indemnification language is rather broad. Would SVCE consider modifying or clarifying the indemnification clause to exclude defence obligations in the cases of SVCE's own negligence?

Exceptions to the standard contract terms must be included in the proposal. See section 8 of the RFP.

101. Why are you looking for a new marketing and communications partner at this time?

See the answer to question 8.

102. How do you envision your selected partner collaborating and working with your other agency partners?

We have collaborated extensively with all of our vendors, such as our current advertising agency providing copy and UX/UI support for webpages, which are then implemented by our web development team. We like this approach and appreciate everyone's work in good faith and collaboratively to achieve our shared goal and

mission. These sorts of opportunities may happen again with the selected bidders, but only as needed.

103. Do you require your entire team to be local, or are team members from other geographies acceptable?

We are a hybrid remote organization and a community-owned, local agency. We expect a good number of in-person meetings and collaboration, particularly when we are kicking off new projects. We also do a lot of in-person events.

104. What has been most successful in your marketing and communications to date? What are you most proud of?

We have really appreciated the use of humor and coming at energy topics from a fresh perspective. This has helped to engage customers who otherwise do not care about the topic. The SVCE marketing team has also maintained a very positive and hopeful tone as we look to inspire climate action; we think this is going well.

105. You are in a region that by many measures is likely aware of and open to energy saving measures. What have been the most difficult ideas to communicate, or behaviors to influence?

This is very true for a segment of our customers, but in general, energy is not top of mind, so breaking through and reaching those not otherwise interested is difficult to do. Electrification in general is a relatively new topic for most customers. We also know from survey data that many customers (~40%+) do not know what electric rate they are on.

106. Have any recent studies been conducted to evaluate campaign effectiveness or creative performance? If available, can you share those findings?

We have not completed studies to this effect, instead we have internal evaluations on an individual campaign basis to track performance and if we've met our goals.

107. What types of existing data, research, or insights from you and your partners will be available to support campaign strategy and performance tracking?

We will make all existing data, such as customer surveys available to the selected bidder. This information is also shared publicly in our board packets. The results from the 2024 annual customer survey will be presented to the [SVCE executive committee](#) on Friday, May 23 at 10 a.m. (the meeting will be recorded and posted.) There are also many public studies available from groups like Rewiring America (e.g., recent [Powering the Future](#) study). We hope the selected partner is familiar with this landscape already.

108. Do you have personas developed which can inform marketing and communications, or will you need research to develop those?

We have them, during market research and strategy work, the selected partner is invited to assist in improving and refining these personas.

109. Who are your main competitors, both regionally and nationally?

No competitors on program offerings, alternatives are available for the generation portion of customer bills. As described in the pre-proposal webinar, we are a local, public agency serving a defined geographic area.

110. What do you consider your biggest opportunities? Your biggest challenges?

Biggest opportunities are conveying our proven track record of saving customers money while delivering clean power. We help our customers save money with rebates and competitive rates. We also assist our communities and customers with reducing their climate impact through electrification, which has the co-benefits of improved health and safety for individuals and the region. Challenges are awareness of SVCE as we are still relatively new, high energy bills, and the upfront cost of electrification.

111. When you say consultant must plan and deploy ads, you are stating that we will be responsible for media planning and buying correct?

Yes

If Yes:

- a. Is there a set media budget? Can you share media spend for the previous 2-3 years?**
 - i. See answer to question #4.
- b. What media placements, platforms, or creative assets have proven most effective in driving conversions or awareness in the past year?**
 - i. Google PMAX, Meta
- c. How is performance evaluated for campaigns—e.g., what role do metrics like ROI, impressions, RevPAR, or website conversions play in campaign optimization?**
 - i. CPLPV, CPC, and conversions are all tracked and campaigns have been adjusted in real-time to optimize outcomes. We hope our new partner can assist with setting up a system to better track campaign by campaign performance and provide analytics and conversion tracking support.
- d. Are you open to media planning innovations such as contextual targeting, retail media networks, or DOOH programmatic platforms?**

Yes
- e. What access will the agency have to first-party data (e.g., CRM/email lists, booking data, visitor movement) to inform targeting and creative development?**
 - i. We are open to exploring this possibility with the partner, however, we must ensure customer privacy is preserved. See response to question #86.

112. Knowing that website design / dev can be complicated and be approached many ways, is a price range okay at this stage, or do you need a firm number? Is there a budget or budget range set for the website?

Prefer firm number, but ranges are acceptable as well.

113. Will existing content need to be migrated? If yes, how many pages/media assets?

Much of the existing content will be migrated, some may be removed, particularly outdated pages, and overall all UI/UX improved and refreshed.

114. How many content managers will need access, and what are their permission levels?

We want flexibility in the number of managers we can have and in the levels of access. We may start with 10-15 content managers at the editor to admin level, but we may possibly want other levels of access.

115. Will there be a need for automated content migration?

We don't have a huge volume of content to migrate, open to guidance from partner.

116. Will SVCE be responsible for content entering for new pages and components?

See answer to question 96.

117. What tracking tools should be installed (e.g., GA4, etc.)?

GA4 (conversions set up via tag manager for use within Google and Meta), Looker charts reconfigured (if changes break them or new opportunities arise), HotJar.

118. Who will need access to edit the site? Do you need role-based permissions?

A number of internal stakeholders. Ideally, yes, for different levels of permissions.

119. Are there any specific accessibility (WCAG) or security compliance requirements?

See response to question 95.

120. Should we plan to establish a cookie policy?

This is a policy that should be established during the refresh, and would be pending organizational approval to move forward.

121. Which specific goals or KPIs will define success for this engagement? (e.g., electrification program enrollment, community awareness, earned media impressions)?

This will be different for each specific campaign. In general, the communications support we seek should result in more awareness and earned media placements, as

well as an increase in understanding of SVCE and what we do. The marketing support will be more straightforward, with defined program enrollment goals.

122. What is the anticipated annual budget range for the contract? It appears that number has been left blank.

See answer to question 4.

123. In the RFP it states "The compensation to be paid to Consultant under this Agreement for all services described in Exhibit "A" and reimbursable expenses shall not exceed a total of *Click here to enter dollar amount in words.*"

See answer to question 79. Do not complete the sample contract as part of your proposal.

124. Will SVCE provide brand guidelines, brand assets, and brand content libraries, or should the agency expect to build those?

SVCE will provide these.

125. Are there any ongoing legal or political considerations that could impact the marketing approach (e.g., regulatory messaging, public opposition)?

This is always a possibility, but none at this time. SVCE is closely monitoring potential changes to federal consumer tax credits that support electrification.

126. How does SVCE view the relationship with PG&E?

SVCE and PG&E staff work in close partnership to serve our shared customers.

127. Is it important to present alignment with PG&E or is there an appetite for contrasting against PG&E?

See answer directly above.

128. What are some of the biggest misconceptions about SVCE to overcome?

The most common complaints from residential customers are that we are an extra charge on PG&E bills (we are not) and that we install residential solar. The situation is more nuanced for other audiences, but it boils down to the need to communicate our value and impact as a Community Choice Aggregator.

129. You mentioned during the webinar that there are a ton of programs, how are those programs being prioritized?

The Programs Team sets our participation goals and prioritizes programs, there is some external factors in the policy landscape that determine these as well.

130. How would you like SVCE to be positioned in the market (vs where you are currently)?

We're a not-for-profit, local government agency. We want to be positioned as our customers' trusted energy advisor. Most customers think of PG&E first, so this is a big challenge to get to where we want to be.

131. Are there any topics or areas you *don't* want to be associated with? Are there any reputational issues or sensitive topics on the horizon?

Since SVCE generation rates only comprise 1/3 of energy bills, we do not have much control over rising bills. The energy market is always dynamic and constantly changing, with new regulations and challenges. We currently enjoy a good reputation among our customers and in the community.

132. Is SVCE currently working with a communications or marketing firm?

See answer to questions 1 and 8.

133. How will responses be scored/judged?

By an internal cross-team committee.

134. Has funding for the project been approved?

Yes.

135. You mention Wordpress as a CMS option. Are you at all concerned with the current governance at [WordPress.org](https://www.wordpress.org) and their conflict with WP Engine?

We are unaware of this issue.

136. Have you yourself already explored alternative page builders besides WordPress / Elementor?

No, we have not, but we are open to others.

137. How important is a drag-and-drop template builder like Elementor?

Our team maintains much of the website ourselves, what is important is that this is easy to do without coding knowledge.

138. Does SVCE have a preference for drag-and-drop email templates vs coding out HTML templates?

Prefer drag and drop, but also plan to use HTML for certain more modern/agile email designs.

139. How frequently does the SVCE team update non-News related website content?

Varies, but adjustments are done almost weekly.

140. In Task B Item 3b of the High Level SOW, 11 items are mentioned. We are interested in supporting all of them, but are curious if any are anticipated to be the handful of priorities.

Not anticipated, all important.

141. Would SVCE be interested in a vendor fulfilling just one of the Sections (ie, just Task B Item 5 - Website Design and Development)?

We are ideally looking for a qualified firm who can assist with our website as part of their expertise as a marketing and/or communications agency. We are seeking proposals to either Task A, B, or both.