

CONTRACT REQUEST FORM (CRF)



New Contract - - Amendment to Existing Contract: - - Amendment Number: _____

Division	Contract Manager:	MS-	Phone	CM Training Date
600 Fuels and Transportation Division	David Nichols	27	916-654-4604	7/26/10

Contractor's Legal Name	Federal ID Number
tmdgroup, inc.	71-0904166

Title of Project
ARFVTP Outreach & Marketing Campaign

Term	Start Date	End Date	Amount
New/Original Contract	06 / 13 / 12	11 / 30 / 14	\$ 2,210,000

Line up the Amendment information as best as possible in the following boxes

Amendment #	End Date (mm/dd/yy)	Amount

Business Meeting Information

Proposed Business Meeting Date	6/13/12	<input type="checkbox"/> Consent	<input checked="" type="checkbox"/> Discussion
Business Meeting Presenter	David Nichols	Time Needed:	5 minutes

Agenda Item Subject and Description

Possible approval of an outreach and marketing contract with tmdgroup inc. for \$2,210,000 that will represent an initial launch of a professionally developed campaign based on research to inform and influence key California stakeholders (i.e. goods movement leaders, fleet owners, independent vehicle operators) to the benefits of lower carbon clean alternative fuels, and advanced vehicle technologies.

Business Meeting approval is not required for the following types of contracts: *Executive Director's signature is required in all cases.*

- Contracts less than \$10k (*Policy Committee's signature is also required*)
- Amendment for a no-cost time extension. Must be first extension, less than one year and original contract less than \$100k.
- Contracts less than \$25k for Expert Witness in Energy Facility licensing cases and amendments.

Purpose of Contract or Purpose of Amendment, if applicable

The purpose of this contract is to engage a full-service advertising and social marketing agency to develop and execute a comprehensive outreach and marketing campaign to advance the transition of the transportation fuels market to non-petroleum, lower carbon, clean alternative fuels and advanced vehicle technologies. The Alternative and Renewable Fuels and Vehicle Technology (ARFVT) Program has a contractor that can offer its relevant experience, strategies, and activities/campaigns to expand the market for alternative fuels and advanced vehicle technologies in California. The outreach and marketing program campaign resulting from this contract will represent the initial launch of a professionally developed campaign to assist the Program in achieving its mission. As such, the Energy Commission recommends the services of a generalist advertising and social marketing firm that possesses the experience, creativity, and talent required to develop and implement a comprehensive research-based campaign that is responsive to the diverse and evolving advanced transportation market.

California Environmental Quality Act (CEQA) Compliance

1. Is Contract considered a "Project" under CEQA?
 - Yes: skip to question 2
 - No: complete the following (PRC 21065 and 14 CCR 15378):
 Explain why contract is not considered a "Project":
 Contract will not cause direct physical change in the environment or a reasonably foreseeable indirect physical change in the environment because this is a paper study that causes no physical change as defined in CEQA.
2. If contract is considered a "Project" under CEQA:
 - a) Contract **IS** exempt. (Draft NOE required)
 - Statutory Exemption. List PRC and/or CCR section number: _____
 - Categorical Exemption. List CCR section number: _____
 - Common Sense Exemption. 14 CCR 15061 (b) (3)
 Explain reason why contract is exempt under the above section: _____
 - b) Contract **IS NOT** exempt. The Contract Manager needs to consult with the Energy Commission attorney assigned to their division and the Siting Office regarding a possible Initial Study.

CONTRACT REQUEST FORM (CRF)

Budgets Information								
Contract Amount Funded		Breakdown by FY			Funding Sources			
Funding Source	Amount	FY	Amount	Approved ?	Funding Source	FY	Budget List No.	Amount
ARFVTF	\$2,210,000	10/11	\$1,960,000	Yes	Funding Source	10/11	601.118c	\$1,960,000
ECAA	\$	11/12	\$250,000	Yes	Funding Source	11/12	601.118d	\$ 250,000
State- ERPA	\$		\$	No	Funding Source			\$
Federal	\$		\$	No	Funding Source			\$
PIER - E	\$		\$	No	Funding Source			\$
PIER - NG	\$		\$	No	Funding Source			\$
Reimbursement	\$		\$	No	Funding Source			\$
RRTF	\$		\$	No	Funding Source			\$
Other:	\$		\$	Yes	Other:			\$
TOTAL: \$2,210,000		TOTAL: \$2,210,000			TOTAL:			\$2,210,000
Reimbursement					Federal Agreement #:			

Contractor's Administrator/ Officer		Contractor's Project Manager	
Name:	Patricia Costanza	Name:	David Nichols
Address:	1750 Howe Avenue, Suite 110	Address:	1516 Ninth Street, MS 27
City, State, Zip:	Sacramento, CA 95825	City, State, Zip:	Sacramento, CA 95814
Phone/ Fax:	916.487.5109	Phone/ Fax:	916.654.4604 / 916.654.4753
E-Mail:	pcostanza@tmdgroup.net	E-Mail:	david.nichols@energy.ca.gov

Contractor Is

Private Company (including non-profits)

CA State Agency (including UC and CSU)

Government Entity (i.e. city, county, federal government, air/water/school district, joint power authorities, university from another state)

Selection Process Used

Solicitation Select Type Solicitation #: 600-11-601 # of Bids: 11 Low Bid? No Yes

Non Competitive Bid (Attach CEC 96)

Exempt Select Exemption (see instructions)

Civil Service Considerations

Not Applicable (Contract is with a CA State Entity or a membership/co-sponsorship)

Public Resources Code 25620, et seq., authorizes the Commission to contract for the subject work. (PIER)

The Services Contracted:

are not available within civil service

cannot be performed satisfactorily by civil service employees

are of such a highly specialized or technical nature that the expert knowledge, expertise, and ability are not available through the civil service system.

The Services are of such an:

urgent

temporary, or

occasional nature

that the delay to implement under civil service would frustrate their very purpose.

Justification:

Services are being contracted because they are not available within civil service, cannot be performed satisfactorily by civil service employees, and are of such a highly specialized or technical nature that the necessary expert knowledge, experience and ability are not available through the civil service system. [California Government Code Section 19130 (b) (3)]

Payment Method

A. Reimbursement in arrears based on:

Itemized Monthly Itemized Quarterly Flat Rate One-time

B. Advanced Payment

C. Other, explain:



Retention			
1. Is contract subject to retention?	<input type="checkbox"/> No	<input checked="" type="checkbox"/> Yes	
If Yes, Do you plan to release retention prior to contract termination?	<input checked="" type="checkbox"/> No	<input type="checkbox"/> Yes	

Justification of Rates			
11 proposals for RFP 600-11-601 were submitted. 10 met administrative qualification. On a scale of 100 points the proposals scored as follows: 3 applicants scored less than 70 points. 6 applicants scored between 75.05 and 81.35 points. The winning applicant scored 90.98 points. Rates were score weighted at 30 total points possible of 100 total.			

Disabled Veteran Business Enterprise Program (DVBE)			
1. <input type="checkbox"/> Not Applicable			
2. <input checked="" type="checkbox"/> Meets DVBE Requirements	DVBE Amount:\$	<u>110,500.00</u>	DVBE %: <u>5</u>
<input type="checkbox"/> Contractor is Certified DVBE			
<input checked="" type="checkbox"/> Contractor is Subcontracting with a DVBE:	<u>The Jernigan Group</u>		
3. <input type="checkbox"/> Contractor selected through CMAS or MSA with no DVBE participation.			
4. <input type="checkbox"/> Requesting DVBE Exemption (attach CEC 95)			

Is Contractor a certified Small Business (SB), Micro Business (MB) or DVBE?				<input type="checkbox"/> No	<input checked="" type="checkbox"/> Yes	
If yes, check appropriate box:				<input checked="" type="checkbox"/> SB	<input type="checkbox"/> MB	<input type="checkbox"/> DVBE

Is Contractor subcontracting any services?				<input type="checkbox"/> No	<input checked="" type="checkbox"/> Yes
If yes, give company name and identify if they are a Small Business (SB), Micro Business (MB) and/or DVBE:					
Ewald & Wasserman Research Consultants, LLC	<input checked="" type="checkbox"/> No	<input type="checkbox"/> SB	<input type="checkbox"/> MB	<input type="checkbox"/> DVBE	
Olmstead Williams Communications	<input checked="" type="checkbox"/> No	<input type="checkbox"/> SB	<input type="checkbox"/> MB	<input type="checkbox"/> DVBE	
See Attached.	<input type="checkbox"/> No	<input type="checkbox"/> SB	<input type="checkbox"/> MB	<input type="checkbox"/> DVBE	

Miscellaneous Contract Information			
1. Will there be Work Authorizations?	<input type="checkbox"/> No	<input checked="" type="checkbox"/> Yes	
2. Is the Contractor providing confidential information?	<input checked="" type="checkbox"/> No	<input type="checkbox"/> Yes	
3. Is the contractor going to purchase equipment?	<input checked="" type="checkbox"/> No	<input type="checkbox"/> Yes	
4. Check frequency of progress reports			
<input checked="" type="checkbox"/> Monthly	<input type="checkbox"/> Quarterly	<input type="checkbox"/> Other...	
5. Will a final report be required?	<input type="checkbox"/> No	<input checked="" type="checkbox"/> Yes	
6. Is the contract, with amendments, longer than a year? If yes, why?	<input type="checkbox"/> No	<input checked="" type="checkbox"/> Yes	
Multiple year requirement for information required with research and analysis.			

The following items should be attached to this CRF			
1. Scope of Work, Attach as Exhibit A.	<input type="checkbox"/> N/A	<input checked="" type="checkbox"/> Attached	
2. Budget Detail, Attach as Exhibit B.	<input type="checkbox"/> N/A	<input checked="" type="checkbox"/> Attached	
3. CEC 96, NCB Request	<input checked="" type="checkbox"/> N/A	<input type="checkbox"/> Attached	
4. CEC 30, Survey of Prior Work	<input type="checkbox"/> N/A	<input checked="" type="checkbox"/> Attached	
5. CEC 95, DVBE Exemption Request	<input checked="" type="checkbox"/> N/A	<input type="checkbox"/> Attached	
6. Draft CEQA Notice of Exemption (NOE)	<input checked="" type="checkbox"/> N/A	<input type="checkbox"/> Attached	
7. Resumes	<input checked="" type="checkbox"/> N/A	<input type="checkbox"/> Attached	
8. CEC 105, Questionnaire for Identifying Conflicts		<input checked="" type="checkbox"/> Attached	
9. CEC 106, IT Component Reporting Form		<input type="checkbox"/> Attached	

Contract Manager _____ Date _____ Office Manager _____ Date _____ Deputy Director _____ Date _____

The following signatures are only required when contract approval is delegated to the Executive Office and not approved at a Business Meeting. See Business Meeting Information Section.

Presiding Policy Committee _____ Date _____ Associate Policy Committee _____ Date _____ Executive Director _____ Date _____

Exhibit A

Scope of Work

BACKGROUND

In California, the transportation sector represents roughly half of all energy consumed and is more than 90-percent dependent on petroleum. Despite the current economic turmoil, Californians still consume more than 50 million combined gallons of gasoline and diesel every day. Petroleum-fueled transportation contributes about 40 percent of the state's greenhouse gas (GHG) emissions; the largest amount of any one sector.

Through 2015, the Energy Commission has been authorized to provide funding, up to \$100 million per year, to leverage public and private investments committed to the development and deployment of alternative fuels and advanced transportation technologies. The Energy Commission is authorized to support projects that:

- Develop and produce alternative and renewable low-carbon fuels in California
- Optimize alternative and renewable fuels for existing and developing engine technologies
- Decrease, on a full fuel cycle basis, the overall impact and carbon footprint of alternative and renewable fuels and increase sustainability
- Expand fuel infrastructure, fueling stations, and equipment
- Improve light-, medium-, and heavy-duty alternative vehicle technologies
- Retrofit medium- and heavy-duty on-road and non-road vehicle fleets
- Expand infrastructure connected with existing fleets, public transit, and transportation corridors
- Establish workforce training programs, conduct public education and promotion, and create technology centers

Annual Investment Plan

The California Energy Commission must prepare and adopt an annual investment plan or update for the Alternative and Renewable Fuel and Vehicle Technology Program that establishes funding priorities and describes how Program funding will be used to complement other public and private investments. All projects funded by the Energy Commission must be consistent with the priorities established in the investment plan or update. Due to the fact that each investment plan establishes the program focus and funding priorities for the coming year, the Contractor will be expected to prepare a new or revised Outreach and Marketing Plan to remain consistent with the goals and priorities identified in each new investment plan or update.

Target Audiences

The primary audiences for the Program's outreach and marketing are fleet owners/managers and independent vehicle operators in California. These audiences have diverse transportation needs, based on geographical location, available fueling infrastructure, need (annual vehicle miles traveled (VMT), duty-cycle, etc.), cost factors, and required vehicle weight (from light-duty vehicles to heavy-duty vehicles).

AGREEMENT GOALS

The primary goal of the Agreement is to accelerate market acceptance and adoption of alternative fuels and new clean, efficient low-carbon vehicle technologies that reduce petroleum dependence and the generation of greenhouse gas emissions.

To achieve this goal, the Contractor must develop and implement a comprehensive outreach and marketing campaign to increase awareness of the benefits of alternative fuels and vehicles from a business, economic, social, and environmental perspective. The Program's outreach and marketing effort must serve to familiarize commercial and public fleet owners/managers and independent vehicle operators with the currently available alternative fuels and advanced vehicle technologies, their optimum duty cycle, the benefits of adopting these new technologies, and the resources available to help remove or reduce barriers to adoption of alternative fuels and vehicles.

Other goals of the Agreement are to:

- Increase the target audiences' awareness of the availability and benefits of various alternative fuels and vehicle technologies for commercial, public, and private use,
- Accelerate market acceptance and adoption of advanced vehicle technologies,
- Educate fleet and commercial vehicle owners and operators about the life-cycle cost savings of alternative fuels and vehicles,
- Develop and implement a comprehensive, cost-efficient and well-leveraged outreach and marketing campaign,
- Identify, reach, and influence the Program's diverse target audiences, and
- Establish outreach and marketing partnerships with regional stakeholders or air districts to increase awareness of regionally-focused alternative fuels and efficient vehicles.

FORMAT/REPORTING REQUIREMENTS

Deliverables/Reports

When creating reports, the Contractor shall use and follow, unless otherwise instructed in writing by the Commission Contract Manager (CCM), the latest version of the Consultant Reports Style Manual published on the Energy Commission's web site:

http://www.energy.ca.gov/contracts/consultant_reports/index.html

Each final deliverable shall be delivered as one original, reproducible, 8 ½" by 11", camera-ready master in black ink. Illustrations and graphs shall be sized to fit an 8 ½" by 11" page and readable if printed in black and white.

Electronic File Format

The Contractor shall deliver an electronic copy (CD ROM or memory stick or as otherwise specified by the CCM) of the full text in a compatible version of Microsoft Word (.doc).

The following describes the accepted formats of electronic data and documents provided to the Energy Commission as contract deliverables and establishes the computer platforms, operating systems and software versions that will be required to review and approve all software deliverables.

- Data sets shall be in Microsoft (MS) Access or MS Excel file format.

- PC-based text documents shall be in MS Word file format.
- Documents intended for public distribution shall be in PDF file format, with the native file format provided as well.
- Project management documents shall be in MS Project file format.

Software Application Development

If this scope of work includes any software application development, including but not limited to databases, websites, models, or modeling tools, contractor shall utilize the following standard Application Architecture components in compatible versions:

- Microsoft ASP.NET framework (version 3.5 and up) Recommend 4.0
- Microsoft Internet Information Services (IIS), (version 6 and up) Recommend 7.5
- Visual Studio.NET (version 2008 and up) Recommend 2010
- C# Programming Language with Presentation (UI), Business Object and Data Layers
- SQL (Structured Query Language)
- Microsoft SQL Server 2008, Stored Procedures Recommend 2008 R2
- Microsoft SQL Reporting Services Recommend 2008 R2
- XML (external interfaces)

Any exceptions to the Electronic File Format requirements above must be approved in writing by the Energy Commission Information Technology Services Branch.

WORK AUTHORIZATION CONTRACT

This is a "Work Authorization" Contract and no work shall be undertaken unless authorized by the Energy Commission through a specific written document called a Work Authorization (WA). Each WA shall clearly define the scope of work, the deliverables, the schedule of deliverables and a detailed budget. The Contractor shall begin work only when a written WA is signed by both the Contractor and the Energy Commission Contract Manager (CCM) and has been approved by the Department of General Services.

TASKS

TASK 1- AGREEMENT MANAGEMENT

Task 1.1 Kick-off Meeting

The goal of this task is to establish the lines of communication and procedures for implementing this Agreement.

The Contractor shall:

- Attend a "kick-off" meeting with the CCM, the Contracts Officer, and a representative of the Accounting Office. The meeting will be held in Sacramento, CA and the CCM will designate the specific location. The Contractor shall include their Project Manager, Contracts Administrator, Accounting Officer, and others designated by the CCM in this meeting. The administrative and technical aspects of this Agreement will be discussed at the meeting.
- If necessary, prepare an updated Schedule of Deliverables based on the decisions made in the kick-off meeting.

The CCM shall:

- Arrange the meeting including scheduling the date and time.
- Provide an agenda to all potential meeting participants prior to the kick-off meeting.

Deliverables:

- An Updated Schedule of Deliverables (if applicable)

Task 1.2 Invoices

The Contractor shall:

- Prepare invoices for all reimbursable expenses incurred performing work under this Agreement in compliance with the Exhibit B of the Terms and Conditions of the Agreement. Invoices shall be submitted with the same frequency as progress reports (task 1.4). Invoices must be submitted to the Energy Commission's Accounting Office.

Deliverables:

- Invoices

Task 1.3 Manage Subcontractors

The goal of this task is to ensure quality products, to enforce subcontractor Agreement provisions, and in the event of failure of the subcontractor to satisfactorily perform services, recommend solution to resolve the problem.

The Contractor shall:

- Manage and coordinate subcontractor activities. The Contractor is responsible for the quality of all subcontractor work and the Energy Commission will assign all work to the Contractor. If the Contractor decides to add new subcontractors, they shall 1) comply with the Terms and Conditions of the Agreement, and 2) notify the CCM who will follow the Energy Commission's process for adding or replacing subcontractors.

Task 1.4 Progress Reports

The goal of this task is to periodically verify that satisfactory and continued progress is made towards achieving the objectives of this Agreement.

The Contractor shall:

- Prepare progress reports which summarize all Agreement activities conducted by the Contractor for the reporting period, including an assessment of the ability to complete the Agreement within the current budget and any anticipated cost overruns. Each progress report is due within 15 calendar days after the end of the reporting period. The CCM will provide the format for the progress reports.

Deliverables:

- Monthly Progress Reports

Task 1.5 - Annual Report

The goal of this task is to prepare a comprehensive Annual Report that describes the original purpose, approach, results and outcomes of the work performed over the preceding year under this agreement. The CCM will review and approve the Annual Report. The Annual Report must be submitted within 60 days of the end of the performance year.

The Annual Report shall be prepared in language easily understood by the public or layperson with a limited technical background. The Annual Report shall be a public document.

Task 1.5.1 Annual Report Outline

The Contractor shall:

- Prepare and submit a draft outline of the Annual Report for review and approval. The CCM will provide written comments to the Contractor on the draft outline. The Contractor shall review the comments and discuss any issues with the recommended changes with the CCM.
- Prepare and submit the final outline of the Annual Report, incorporating CCM comments.

Deliverables:

- Draft Outline of the Annual Report
- Final Outline of the Annual Report

Task 1.5.2 Annual Report

The Contractor shall:

- Prepare the draft Annual Report for this Agreement in accordance with the approved outline.
- Submit the draft Annual Report for review and comment. The CCM will provide written comments to the Contractor. The Contractor shall review the comments and discuss any issues with the recommended changes with the CCM.
- Prepare and submit the Annual Report, incorporating CCM comments.

Deliverables:

- Draft Annual Report
- Annual Report

Task 1.6 Final Report

The goal of this task is to prepare a comprehensive written Final Report that describes the original purpose, approach, results and conclusions of the work completed under this Agreement. The Final Report shall be prepared in language easily understood by the public or layperson with a limited technical background.

The Final Report must be completed before the termination date of the Agreement in accordance with the Schedule of Deliverables.

The Final Report shall be a public document. If the Contractor has obtained confidential status from the Energy Commission and will be preparing both a public and a confidential version of the Final Report, the Contractor shall perform the following subtasks for both the public and confidential versions of the Final Report.

Task 1.6.1 Final Report Outline

The Contractor shall:

- Prepare and submit a draft outline of the Final Report for review and approval. The CCM will provide written comments to the Contractor on the draft outline. The Contractor shall review the comments and discuss any issues with the recommended changes with the CCM.
- Prepare and submit the final outline of the Final Report, incorporating CCM comments.

Deliverables:

- Draft Outline of the Final Report
- Final Outline of the Final Report

Task 1.6.2 Final Report

The Contractor shall:

- Prepare the draft Final Report for this Agreement in accordance with the approved outline.
- Submit the draft Final Report for review and comment. The CCM will provide written comments to the Contractor. The Contractor shall review the comments and discuss any issues with the recommended changes with the CCM.
- Prepare and submit the Final Report, incorporating CCM comments.

Deliverables:

- Draft Final Report
- Final Report

Task 1.7 Prepare and Manage Work Authorizations

The Contractor shall:

- Assist the CCM in drafting WAs in accordance with the Work Authorization provision in Exhibit E of this Agreement.
- Manage WAs executed under this Agreement.

Deliverables:

- Draft Work Authorizations

TASK 2 – MARKET RESEARCH AND ANALYSIS

The goal of this task is to conduct market research and analysis to provide the Energy Commission with relevant and current information to guide in the development of the Outreach and Marketing Plan in Task 3.

The Contractor shall:

- Provide the CCM expertise and support in the development and implementation of outreach and marketing research.
- Submit a Market Research Plan for CCM approval, which describes the recommended research approach to be taken, the audience and regional focus, the market elements to be included or tested, the information sought, and how that information will be used to inform the development of the outreach and marketing plan.

The Market Research Plan must demonstrate how the recommended research approach and techniques will inform campaign development and enhance campaign effectiveness and shall include but not be limited to:

- The target audience's level of awareness of the available alternative fuels and vehicle options.
- The information the target audience needs to know before they can recommend or purchase alternative transportation options.
- The most effective marketing strategies and messaging to increase their awareness and inform their transportation purchase decision.
- Identification of key stakeholders and specific target audiences.

The research plan must include a detailed budget and schedule of deliverables to inform the development of further work authorizations for Task 2.

- Conduct market research and analysis, using a combination of industry recognized market research methods, to determine level of awareness, identify the information required to inform decision making, motivational factors, and effective outreach and marketing approaches. Research approaches may include:
 - Surveys (in-person, telephone, mail, online)
 - Focus Groups
 - Internet strategic intelligence
 - Advertising Research
 - Brand name testing
 - Concept testing
 - Copy testing
 - Buyer decision processes research
 - Other industry recognized research techniques
- Submit a Market Research Report representing the research conducted, research findings, analysis, and recommendations. The report shall also represent findings related to:
 - The target audience's level of awareness of the available alternative fuels and vehicle options.
 - The information the target audience needs to know before they can recommend or purchase alternative transportation options.
 - The most effective marketing strategies and messaging to increase their awareness and inform their transportation purchase decision.
 - The type of advertising research to be used to track and measure the efficacy of the Outreach and Marketing Plan to clearly and effectively communicate the message and motivate the target audience to adopt alternative fuels and/or vehicles.

TASK 3 – OUTREACH AND MARKETING PLAN

The goal of this task is to develop an Outreach and Marketing Plan to meet the outreach and marketing needs of the Program, and to periodically revise the Outreach and Marketing Plan to remain consistent with the funding priorities and goals established in the annual update to the Program investment plan.

The Program's outreach and marketing campaign must serve to familiarize commercial and public fleet owners/managers and independent vehicle operators, stakeholder, and interested parties with the currently available alternative fuels and advanced vehicle technologies, their optimum duty cycle, the benefits of adopting these new technologies, and the resources available to help remove or reduce barriers to adoption of alternative fuels and vehicles.

Task 3.1 General Campaign

The goal of this task is to develop a General Campaign, which will consist of the broader Program branding, messages, outreach activities, and marketing media.

The General Campaign plan must demonstrate the approach, deliverables, and activities to be implemented in Task 4 to develop and disseminate information and resources specific to multiple alternative fuels and vehicles, audiences, regions, partners, and stakeholder groups, consistent with the priorities identified in the annual update to the Program investment plan.

The Contractor shall:

- Provide expertise, support, and recommendations in the preparation of a comprehensive Outreach and Marketing Plan for the Program.

- Prepare and submit a draft General Campaign Outreach and Marketing Plan using the plan submitted with your proposal as a starting point and incorporating the findings and recommendations resulting from the market research and analysis completed in Task 2.

The Contractor shall provide expertise, support, and recommendations to inform development of the General Campaign Plan, which shall include but not be limited to:

- Brand, messaging, and media advertising development
- Development of clear, concise, and benefit-rich messages applicable to specific alternative fuels and vehicles
- Media production and photography
- Advertising placement analysis, planning, and recommendations
- Leveraged advertising buys and pro-bono exposures
- Expertise in the development of design and messaging of event materials and equipment and planning for future outreach opportunities (conferences, working groups, etc.)
- Program website content recommendations and development support
- Recommendations, expertise and support in planning Program announcements, such as funding opportunities, critical launches, project successes, etc.
- Develop methodology to track and evaluate campaign outcomes and adjust the marketing plan to increase target audience exposures

The General Campaign Plan must include a detailed budget and schedule of deliverables to inform the development of work authorizations for Task 5.

- Prepare and submit a final General Campaign Plan, incorporating comments from the CCM.
- Prepare and submit an annual refinement of the General Campaign Outreach and Marketing Plan to maintain consistency with the goals of new and updated investment plans and to accommodate opportunities with new fuels, technologies, opportunities, and partners.

Task 3.2 Regional Marketing Campaigns

The goal of this subtask is to create multiple regional outreach and marketing plans based on the input obtained through regional outreach collaboration meetings, information collected in Task 2, and elements of the General Campaign developed in Task 3.1.

The Energy Commission is committed to coordinating the development and implementation of regional and alternative fuel focused efforts with the Program's active partners and stakeholders, which may include but not be limited to:

- Clean Cities Coalitions
- Air Districts
- Non-profit alternative fuel and advanced vehicle collaborative

Therefore, within the limits of available funding, it is expected that portions of the program outreach and marketing resources and effort will be dedicated to regionally focused campaigns. The regional campaigns will be crafted in partnership including, regional stakeholders and public officials to leverage regionally-funded activities and to ensure support of key regional outreach efforts related to alternative fuels and advanced vehicle technologies.

The Contractor shall:

- Provide the CCM expertise, support, and recommendations to inform development of multiple regionally focused and coordinated outreach and marketing plans.
- Coordinate regional planning meetings to gather information on opportunities to leverage the Program's outreach and marketing efforts with regional efforts and resources. Regional planning meetings activities shall include but not be limited to:
 - Identify and recommend regions for development of outreach and marketing
 - Identify key stakeholders and specific target audiences in each region
 - Plan and facilitate regional planning meeting(s) logistics
 - Prepare a draft agenda, talking points and meeting informational materials
 - Prepare a summary of each meeting and recommendations from stakeholders
- Develop draft Regional Outreach and Marketing Plans for CCM approval for each approved regional campaign.
 - Each regional plan shall be focused on the alternative fuel(s) and/or vehicle technology that have been adopted by the region.
 - Each regionally focused outreach and marketing plan shall be informed by regional partners through the regional planning meetings and be consistent with the Program Investment Plan.
 - Each regionally focused outreach and marketing plan may include, but is not limited to, the following activities and deliverables:

- Align regional Outreach and Marketing Plans with the general outreach and marketing campaign, inclusive of Program brand, messaging, deliverables, services, costs, and schedule
 - Research and develop media buys, earned media, pro-bono exposures
 - Develop regionally focused fuel and technology message and materials
 - Develop regionally focused marketing to increase industry awareness of program workforce development and training resources
 - Coordinate media production and still photography
 - Develop Program webpage content recommendations
 - Work with Program awardees/grantees located in a given region to jointly develop public opportunities for project outreach and public education
 - Each Regional Outreach and Marketing Plan must include a detailed budget and schedule of deliverables to inform the development of work authorizations for Task 5.
- Prepare and submit final Regional Outreach and Marketing Plans for CCM approval, which shall include all CCM comments and edits from the draft.

Task 3.3 Media Development and Procurement

The goal of this task is to develop various media tools for use as a part of the general campaign, as well as the regional campaigns, to increase target audience awareness and adoption of alternative fuels and advanced vehicle technologies.

The Contractor shall:

- Provide the CCM expertise, recommendations, and support in the development of various media tools for use in both the general and regional campaigns. Media development shall incorporate information obtained and work developed in Tasks 2 and 3 and include, but is not limited to the following:
 - Advertising - media planning and production
 - Strategic media placement and purchasing (cable, network, radio, print)
 - Program webpage content development
 - Creative support for Program events and projects
 - Event planning, coordination, and support
 - Develop multi-media campaign to connect fleets and independent operators with information about alternative fuels and advanced vehicle technologies
 - Develop or solicit articles and opinion/editorials for stakeholder and industry newsletters and publications
 - Coordinate editorial boards and secure strategically placed public service announcements
 - Develop and produce press and speaker kits
 - Identify and apply advertising navigational and evaluative metrics to measure campaign effectiveness and guide refinements to improve effectiveness
 - Campaign results evaluation and recommended refinement
 - Develop methodology to track and evaluate campaign outcomes and adjust the marketing plan to increase target audience exposures
- Work in coordination with the CCM to develop these media tools
- Develop and submit draft Media Development and Procurement Plans for CCM approval. Each Media Plan must include but is not limited to:
 - Specific media elements recommended for implementation

- Types of media to be utilized
- Messaging, graphics, and creatives to be used
- Regions, audiences, and fuels/vehicles to be to be addressed
- Events and activities

Each Media Plan must include a detailed budget and schedule of deliverables to inform the development of work authorizations for Task 5.

- Prepare and submit final Media Development and Procurement Plans for CCM approval, which shall include all CCM comments and edits from the draft.

TASK 4 - OUTREACH AND MARKETING PLANNING MEETINGS

The goal of this task is to manage planning and implementation of the Outreach and Marketing Plan through strategic planning meetings that are regularly scheduled and held on an as-needed basis.

The purpose of the Outreach and Marketing Planning meetings will be to plan and coordinate upcoming deliverables, identify outreach opportunities, identify partnerships, develop outreach activities and partner development marketing campaigns and media buys, to assess the effectiveness of activities, and to conduct long range planning.

Planning meetings will predominately be held at the Energy Commission's office in Sacramento or via conference call.

The Contractor shall:

- Participate in strategic planning with the CCM to maximize results and conserve resources.
- Provide expertise, support, and recommendations in outreach and marketing planning, which shall include, but will not be limited to:
 - Identification of outreach opportunities
 - The best approach to take in the development of outreach activities and partnerships
 - Development of marketing campaigns and media buys
 - How to track and assess the effectiveness of activities and approaches used
 - Long range planning to identify and develop future opportunities and or partnerships.
- Develop a meeting schedule representing the term of the contract for CCM approval.
- Prepare meeting agendas, in coordination with the CCM, for each meeting and distribute the agendas one week prior to each meeting.
- Capture and report understandings, agreements, deliverables, and timelines resulting from each meeting. The meeting report shall be submitted to the CCM within seven working days of the meeting date.

TASK 5 – IMPLEMENT OUTREACH AND MARKETING PLANS

The goal of this task is to implement the Outreach and Marketing Plans informed by research conducted in Task 2 and prepared in Tasks 3 and 4.

The Contractor shall:

- Provide the CCM expertise, recommendations, and support in the implementation of the Outreach and Marketing Campaigns.
- Implement the Outreach and Marketing Plan, including the:
 - General Campaign
 - Regional Campaign(s)
 - Media Development and Procurement

TASK 6- OUTREACH OUTCOMES TRACKING AND ANALYSIS

The goal of this task is to track, measure, and analyze the effectiveness of the Outreach and Marketing Plan in advancing the Program goals and meeting the goals of the agreement. This post-launch evaluation will be utilized to plan future outreach activities and marketing campaigns by identifying the approach that is the most effective in reaching and informing the target audience.

The Contractor shall:

- Utilizing the methodology identified and approved in Task 3, continuously track, measure, and to evaluate the effectiveness of the Outreach and Marketing Plan and recommend refinements to ensure that the plan meets the outreach and marketing goals and aligns with the goals of the Program.
- Develop a format, for CCM approval, to report the campaign effectiveness, evaluation, and recommended refinements.
- Provide outreach and marketing tracking and analysis briefings upon CCM request and following key events and media launches.
- Prepare reports that inform the Stakeholders and Marketing and Outreach efforts on a statewide basis for targeted regions to include:
 - Narrative(s)
 - Graphics
 - Charts
- Prepare and submit a draft quarterly Outreach and Marketing Measures of Success and Evaluation Report for CCM approval. The Report shall address:
 - Outcome metrics and effectiveness analysis
 - Recommended refinements to the campaign to increase effectiveness
- Prepare and submit a final Measures of Success and Evaluation Report, incorporating comments from the CCM.
- Develop and implement approved refinements methodology.
- Include campaign results and refinements in annual and final reports.