

**RFP: EERMC-2022-04**

**Questions Received on 9/29/2022**

**Question and Response:**

1. Is the (1) original ISBE component mandatory for the submission (2.7)? Can an offeror submit a response without an ISBE component? Is the only consequence the absence of points awarded for that category?

Applicants are expected to submit the ISBE component with their application to ensure that the Council receives complete proposals. If an ISBE component is not submitted, the applicant will receive zero points in that category.

2. Can an offeror submit a response for Task 1 (brand and identity) but not Tasks 2 or 3? Is it possible for an agency to be awarded work for Task 1 but not Task 2 or Task 3?

Offerors can submit an application for only Task 1, but preference will be given to agencies that submit applications for all three tasks.

3. What are the relevant insurance requirements (1.17)?

In accordance with State Purchasing guidance, as outlined in Section 13.19 of the General Conditions of Purchase, found at <https://rules.sos.ri.gov/regulations/part/220-30-00-13> and General Conditions - Addendum A found at <https://www.ridop.ri.gov/documents/general-conditions-addendum-a.pdf>, the following insurance coverage shall be required of the awarded vendor(s):

General Requirements:

Liability - combined single limit of \$1,000,000 per occurrence, \$1,000,000 general aggregate and \$1,000,000 products/completed operations aggregate.

Workers compensation - \$100,000 each accident, \$100,000 disease or policy limit and \$100,000 each employee.

Automobile liability - \$1,000,000 each occurrence combined single limit.

4. Is there an overall budget for this engagement?

The Council had originally budgeted \$30,000 for this engagement, but retains the ability to reallocate funds should they be deemed necessary. The budget is negotiable and the Council is willing to review all bids as long as the services are itemized with separate pricing.

5. Is there room for budget negotiation after the final scores are tabulated? For example, if an offeror with a strong technical response is close in price to the highest scoring submission, will the offeror be allowed to revisit the pricing?

The Council retains the right to negotiate on price with a selected vendor once all scoring is complete.

**Questions Received on 10/11/2022**

6. Is there a ballpark budget for this contract we should keep in mind as we prepare a response?

Please refer to Question 4.

**Questions Received on 10/12/2022**

7. Do resumes count as pages towards the technical proposal limit or will these be considered attachments and thus should be referenced as instructed?

Resumes can be considered attachments and can be referenced as instructed.

8. The same question as above for examples of prior work?

Examples of prior work can be considered attachments and can be referenced as instructed.

9. Is there a budget range or limit for this contract?

Please refer to Question 4.

10. Are there any sub-brands or programs that would also need to be branded as part of this work?

The Council has an Executive Committee and an Education Committee that could also be branded as a part of this work.

11. Who within the EERMC and OER will be responsible for approving concepts and revisions for the branding, marketing, digital, and print materials?

The EERMC Education Committee will approve work on behalf of and in consultation with the full Council.

12. Who will be the primary point of contact for the work on this contract?

EERMC consultant Rachel Sholly and Office of Energy Resources (OER) staff Steven Chybowski will be the primary points of contact for this contract.

13. Does the EERMC have any existing social media accounts?

A former vendor created a Facebook page (<https://www.facebook.com/RIEERMC>), but it is not maintained.

14. Does the EERMC have a staff member who would be responsible for managing any social media accounts?

This would be something to discuss as part of a communications strategy. EERMC does not have its own dedicated staff, and is currently supported by its consultants and Office of Energy Resources staff.

15. Is the expectation that social media management will be part of the scope of work for the vendor?

No, long-term social media management is not expected to be a part of the scope of work for the vendor. Establishing an identifiable brand and tools to help the Council reach Rhode Island stakeholders is the primary goal, which may or may not include social media channels.

16. Does the EERMC currently have an email list?

The EERMC currently has a distribution list of stakeholders that are notified of public meetings, but does not have a broad public interest email list.

17. If yes, how was that email list built?

The existing distribution list was built by email requests to be added and is maintained within an Excel spreadsheet.

18. If yes, what email marketing software does it use, if any?

No specific email marketing software is currently used.

19. Does the EERMC have a staff member who would be responsible for email marketing?

Not at this time, but a member could have the option to take on that role or funds could be requested for marketing support in a future annual budget.

20. Is the expectation that email marketing will be the responsibility of the vendor?

Long-term email marketing is not expected to be a responsibility of the vendor in response to this RFP. A vendor may recommend that as a strategy to pursue in the future if that is believed to be in the Council's interest.

21. What content management system (CMS) does the EERMC use for its website currently, and would that CMS be continued under this contract?

The current website is operated through WordPress. That is expected to be the continued CMS moving forward.

22. Are there any restrictions on what CMS can be used to redesign the website?

The Council intends to continue to use WordPress, but would be open to CMS recommendations based on the vendor's experience and expertise.

23. Does EERMC have a webmaster or someone tasked with overseeing website updates?

The Rhode Island Office of Energy Resources is currently managing the Council's website updates.

24. Does the EERMC website have any capabilities it needs to maintain under a redesign?

The EERMC website must retain the ability to (1) post documents and studies for public availability, (2) post public meeting information and materials, and (3) to collect public comment from stakeholders.

25. In regards to print materials, does the EERMC have any "must-haves" for print materials (e.g., Annual Report, general informational brochure, program specific brochures)?

By law, the Council is required to create an Annual Report, which is typically compiled by the Council's consultant team. Additional informational brochures or other materials could be created based on the recommendations of the chosen vendor.

26. Does the EERMC have required applications for its brand (e.g., social media icons, personnel badges, browser favicon, physical signage) that the vendor should be aware of?

Document headers, website logos, and physical signage are all expected applications of its brand. Additional applications may be identified or recommended as a communications strategy is developed.

27. Does the EERMC have a list of efficiency subject matter that will require photography or if that cannot be shared, an estimated number of subjects that will require photography?

The EERMC can work with the selected vendor to compile a list of efficiency subject matter that might be useful to photograph.

28. Is there a desire that a particular proportion of these funds go to an ISBE?  
ISBE businesses will receive up to six bonus points in the scoring of proposals. There is no minimum ISBE requirement.

29. What is the budget for this engagement?  
Please refer to Question 4.

30. Is your ultimate goal to increase awareness of your offering or to increase adoptions of the energy efficiency program?  
Part of this process is to more specifically identify and define the Council's goals and objectives. Increasing participation in the state's energy efficiency programs is likely a core goal. In addition, the Council would like to increase awareness and understanding of its work and role within the state energy landscape.

31. How do you rank your target audiences in order of budgetary importance? Is your primary focus on residential, small business or larger C&I customers? How would you allocate percentages of budget to message to these audiences?  
This would be a question to pose to Council members as part of developing a communications strategy together. Better engagement with the income-eligible sector has been an ongoing topic of discussion.

32. Should any part of the strategic plan be devoted to recruiting and training program contractors/administrators?  
If the chosen vendor believes that this would be a helpful aspect of successful branding and communication, then it can be considered as a part of the strategic plan. This may be something to explore during a learning/discovery phase with Council members.

33. Once the brand has been created, is it expected that this organization would do its own brand campaign as well?  
Once a brand identity has been created, the Council can decide whether they would like to pursue a brand campaign internally or to contract for additional communications campaign work.

34. Have you conducted any research in understanding your audiences?  
The EERMC has not conducted research in understanding its audiences. The utility, Rhode Island Energy, has completed research on participants and non-participants of the energy efficiency programs which could be insightful for developing an EERMC communications strategy. Those studies are publicly available.

35. What are you currently doing for events and local community engagement?  
The Council hosts monthly public meetings, and each year, sponsors the Energy Expo as a part of the Rhode Island Builders Association Home Show. The Council also hires a vendor to organize an annual public forum and lecture series. More information can be found here:  
<https://rieermc.ri.gov/events-education/>

36. Are you looking for organic social management services?  
The Council is open to any and all recommendations regarding social media and management.

37. When was the current logo and brand developed?

The current EERMC logo was designed around 2013-2014 as part of OER's logo redesign.

38. Can you provide more context as to what you are looking for in a website refresh?

The Council is seeking to establish a unique and identifiable brand which would be reflected throughout the website. The Council would like the website to be easy to navigate and encourage stakeholders interested in learning more about energy efficiency opportunities to explore the resources available.

39. Who will be the day-to-day contact for the agency? How many decision makers will be involved in the branding process in terms of feedback and reviews?

EERMC consultant Rachel Sholly and Office of Energy Resources (OER) staff Steven Chybowski will be the primary points of contact for this contract. The EERMC Education Committee will review and approve work on behalf of and in consultation with the full Council. The Committee consists of three engaged Council members and representatives of the Council's consultant team, OER and Rhode Island Energy. It is important to allow for ample review time.

40. Can you share any detail on the current target audiences for EERMC?

Target audiences for the EERMC include energy customers in the residential, income-eligible, commercial and industrial, and small business sectors. More granular defining of target audiences can be done as part of developing a communications strategy together.

41. Is there a current budget set aside for this work?

Please refer to Question 4.

42. What, if any, prior branding and communications planning has been done to support EERMC? If any prior work had been done, will EERMC share those materials with the chosen vendor?

The Council has not engaged in any cohesive branding or communications planning in the past.

43. The RFP appears to be heavily focused on visual branding and strategic planning.

a. Does this RFP anticipate going to market with paid media during the six month timeframe or does EERMC anticipate going to market under a separate RFP?

b. If the paid media campaign is not part of the vision for this six month RFP, will the execution phase be up for a separate competitive bid or will it be added to an existing contract as a contract amendment?

An execution phase for marketing could be a separate competitive bid for the Council after establishing a visual brand and strategic plan. Any future bids would be at the discretion of the Council.

44. How many "print materials to promote EERMC work and messaging" will be required? Is EERMC anticipating that materials will be printed as part of this engagement or is the agency looking for digital files to print in-house?

The Council is primarily interested in digital files to be able to print in-house. There is not a minimum requirement on the materials that need to be printed, but opportunities may be identified between the Council and the chosen vendor.

45. Who will project manage this engagement? Will there be multiple points of contact?

The selected vendor would be responsible for leading project management. EERMC consultant Rachel Sholly and Office of Energy Resources (OER) staff Steven Chybowski will be the primary points of contact for this contract.

46. In section 5.3, the RFP calls for assistance “with identifying target audiences, messages, and engagement goals.” Do you anticipate that these target audiences will be reached with paid Media?

The Council is open to paid media recommendations if that would be the most effective method for reaching target audiences.

47. Also in section 5.3, the RFP calls for the development of systems and metrics to measure and track engagement. Are these recommended systems and metrics to support a future campaign?

At the Council’s discretion, it may choose to use this information as part of a future public outreach and education campaign.

48. In 5.3, the RFP calls for a refresh of the EERMC website with updated communications and brand aesthetic.

a. Who will be responsible for updating the look and feel of the website? If it is the selected vendor, what platform is the EERMC currently built on?

The EERMC website is currently maintained through WordPress. The selected vendor could update the website directly or provide recommendations for the Council to make updates on its own.

b. Does this work include navigation changes or only visual and messaging?

The work could include navigational changes in addition to the visual and messaging changes if opportunities for such improvement are identified.

c. Approximately how many pages would need to be refreshed?

Approximately ten pages may need to be refreshed in order to establish a consistent brand and image.

49. Also in 5.3, the RFP calls for an increase in social media presence.

a. Is there a budget for paid social media?

If paid social media is determined to be an effective avenue to pursue, and an estimated budget is not included in the project proposal, the Council could consider allocating additional funds.

b. Would this require the creation of new pages?

c. What social media platforms does EERMC currently have a presence on?

A former vendor created a Facebook page (<https://www.facebook.com/RIEERMC>), but it is not maintained. If additional social media is recommended, it would require new accounts to be created.

50. Also in 5.3, does EERMC anticipate that the vendor will facilitate the production and printing of event tabling materials or is there a preferred vendor that EERMC uses for production?

The Council does not have a preferred vendor for materials production and printing. It would be ideal if the vendor could facilitate this process.

Additionally, please describe the kinds of events these materials will be used for.

At a minimum, the materials would be offered at the Council’s public events, including an annual public forum, energy lecture series, and the Energy Expo at the Rhode Island Home Show. Additional opportunities may be identified by the vendor or the Council as part of this contract. More information can be found here: <https://rieermc.ri.gov/events-education/>

51. What in-house communications and PR capabilities does EERMC have?

The Council does not retain any staff dedicated to communications or public relations. Any past communications have been coordinated through contracted vendors or OER communications staff. If recommended, the Council could consider soliciting long-term communications capacity through a separate contract.

52. What is the funding source for this work and what reporting requirements does the grantor have?

The Council's budget comes entirely from the state's system benefits fund, which is collected via a small charge on ratepayer electric and natural gas bills through Rhode Island Energy. While there are no specific reporting requirements, the Council's expenditures are approved and overseen by the Public Utilities Commission as part of Rhode Island Energy's Annual Energy Efficiency Program Plan.