

New York State Energy Research & Development Authority
Task Work Order Request
Integrated Marketing Communications Program for
Green Jobs – Green New York Marketing Program
September 14, 2010

The New York State Energy Research and Development Authority (NYSERDA) is seeking proposals for an Integrated Marketing Communications Program for the Green Jobs – Green New York Program. As a result of being qualified for full-service marketing through RFP/RFQL 1224, you are invited to submit a proposal in response to the following Task Work Order (TWO) Request.

Proposals must be received by NYSEDA by 5 pm on October 12, 2010. For specific instructions on submitting a proposal, please see the Proposal Requirements section of this TWO, which is located on page six of this document.

Budget: \$3.5 Million

Timeframe: The Green Jobs – Green New York (GJGNY) Program is a two year Program. It is expected to begin in late October 2011. The Integrated Marketing Communications Program is expected to begin immediately.

Project Summary:

Under NYSEDA direction, the Contractor shall develop and execute a statewide integrated marketing communications program to support the Green Jobs – Green New York (GJGNY) Program. The GJGNY Marketing Program will:

- Identify opportunity segments, drivers, barriers, and messages
- Build awareness of the GJGNY program
- Increase participation in GJGNY
- Increase the number of accredited BPI contractors offering audit and retrofit services
- Build the pipeline of New Yorkers participating in Green Jobs training

Program awareness building initiatives will make the program broadly accessible through NYSEDA's hotline, Web site, participating contractors, and defined delivery channels. A coordinated (companion) community outreach effort, led by Constituency-based Organizations (CBOs) will target priority audiences outlined in the GJGNY Legislation including residential and multi-family building owners, small businesses, and not-for-profit organizations (NFPs) across New York State. In addition, marketing will target the residential contractor market to increase the number of BPI-accredited contractors performing Home Performance with ENERGY STAR® audits under the GJGNY program.

Information on the GJGNY Program, including the Operating Plans for the Outreach, Workforce, Multifamily, Small Commercial and Not-for-Profit, and 1-4 Family Buildings Components can be found at <http://www.nyseda.org/GreenNY/documents/GJGNYMarketingPlanFinal.pdf>. It is highly encouraged that proposers become familiar with the components of the GJGNY program.

Marketing services will include, but are not be limited to: research, planning, messaging, creative strategy and development, branding, direct marketing and database management, copywriting, social marketing, media planning and placement, promotional support, public relations, account management, and audience recommendations.

The GJGNY marketing Program will begin immediately and will be implemented for the duration of the two-year GJGNY program. The total budget is \$3.5 million.

Background

GJGNY is a statewide program to promote energy efficiency and the installation of energy efficiency measures and clean technologies to reduce energy costs and reduce greenhouse gas emissions. The GJGNY Program has been designed to deliver services in targeted communities through Constituency Based Organizations (CBOs). CBOs will conduct outreach, marketing, and education through a coordinated approach that targets priority communities. CBOs will encourage participation in energy efficiency programs, facilitate awareness of workforce training opportunities available through the GJGNY, and assist with enrollment in those efforts.

The GJGNY Program elements will align closely with existing NYSERDA Programs.

- Residential: Homeowners and building owners will leverage the existing Home Performance with ENERGY STAR® program and work with BPI accredited companies to complete projects financed through the GJGNY Loan Fund. NYSERDA will expand the pool of qualified BPI contractors.
- Multifamily Buildings: Building owners will be served through NYSERDA's Multifamily Performance Program or through utility programs that meet the standards established for GJGNY.
- Businesses: Small businesses and NFPs will leverage the existing NYSERDA FlexTech Audit Program. NYSERDA will expand the pool of qualified auditors.
- Workforce Development: Job training components will target existing, emerging, unemployed, and disadvantaged workers and ultimately, provide additional workers to existing companies and help build new energy efficiency companies. Efforts will be made to reach out to minority- and women-owned businesses, to target businesses that serve economically distressed communities, and to add contractors in targeted regions and areas where contractor coverage currently is limited.

The GJGNY Program will offer innovative financing mechanisms to encourage retrofits. The GJGNY Program also will align with LIPA, Utility, and Federal Programs.

NYSERDA will develop alliances with Centers of Influence (COIs) to extend the reach of the GJGNY outreach and marketing activity. COIs include organizations that serve targeted constituencies such as Small Business Development Centers, local governments, trade organizations, and educational centers.

Marketing Program Requirements:

Project Management/Contract Administration:

The Contractor shall manage and supervise all Tasks associate with the contract during the agreement period including, but not limited to, the following: meetings, phone, fax, and e-mail communications; planning; reporting; program scheduling; marketing consultation; creative development; media plan development; billing; and production efforts related to projects and programs that are part of this agreement. Where possible, the Contractor shall use New York-based companies and conform to State guidelines to develop and produce all plan components, including but not limited to, media outlets, production and printing, and community-based outreach.

Develop and Implement an Integrated Marketing and Communications plan:

The Contractor shall develop, in concert with NYSERDA staff, an integrated Marketing and Communications plan that supports the achievement of GJGNY goals. The plan shall include the following components: Situation Analysis; Marketing Objectives; Tactical Implementation Plan; Action Plan (task/activity being pursued, staffing, schedule, budget, and expected results); Marketing Budget, including a breakdown of all costs (personal services, creative and production services, estimated travel, and expenses); deliverables; and evaluation methodology.

Conduct Market Research

The Contractor shall conduct research to better understand audience motivators and drivers; to determine the most effective messages for the target audiences; and to determine the challenges, opportunities, and barriers associated with accomplishing GJGNY objectives, specifically:

- Determine how to best position and market GJGNY to each audience, including reaction to past and potential new marketing approaches
- Understand the needs and behaviors related to energy efficiency improvements and financing
- Identify motivators and triggers related to energy efficiency improvements and financing
- Test understanding, perceived benefits, and appeal of product features and enhancements included in GJGNY
- Uncover barriers to participation in the program and gather insights regarding messages and delivery mechanisms

The Contractor shall conduct focus group research to gain insight into how the existing Home Performance with ENERGY STAR Program is perceived, determine what motivates consumers and contractors to participate, collect feedback on program experience/desired improvements, and test reaction to new program features/benefits being developed under the GJGNY Initiative.

Develop GJGNY Branding and Positioning Platform

The Contractor shall develop a unique GJGNY program brand name that will be identified with a GJGNY “brand stamp.” The GJGNY “brand stamp” will convey a unique umbrella benefit position supported by features that include audits, offered free or on a cost-shared basis, and creative financing options. Aligned messaging and a unique visual identity will be created to support program roll-out, ensure consistency, and quickly build program awareness. Messaging framework documents will be developed for the program overall and for each priority target audience. The approach will:

- Position GJGNY as a brand and reinforce that aligned programs provide value
- Elevate and communicate the State’s leadership position in delivering energy efficiency programs

- Facilitate efforts to reintroduce aligned programs like Home Performance with ENERGY STAR while using the GJGNY brand to generate publicity
- Enable multiple program administrators to promote GJGNY (LIPA and the utilities)
- Encourage additional contractor participation
- Continue to align NYSERDA and New York State with efforts to grow jobs in the State
- Ensure flexibility

Develop GJGNY Messaging Platform

Confirmed through the research effort, the marketing Contractor shall develop messages that motivate audiences to participate in the program. Potential high-level messages may highlight:

- Audits to identify energy efficiency/savings opportunities
- Incentives to reduce costs
- Attractive financing options, including on-bill payments (no cash outlay)
- Working with trusted, experienced, and objective personnel to facilitate the study and implementation processes
- Improved operating costs
- Improved productivity and delivery of mission

NYSERDA realizes that messaging also may need to address other ongoing customer challenges, including lack of reliable information on energy-efficient choices and how they may apply to a given building or business, resistance to new and innovative technologies or unfamiliar contractors, uncertainty of savings, undervaluing energy efficiency, and perception of risk on the part of borrowers uncertain that new energy technology or efficiency projects are profitable for their specific properties.

Consideration for sector-specific messages will be necessary, given that unique factors and needs vary among target prospects.

The Contractor shall also develop a messaging framework to target contractors not currently BPI Accredited and encourage additional companies to become accredited.

Creative Services and Materials

In accordance with the approved marketing and communications plan, the Contractor shall develop a comprehensive suite of collateral materials to support Outreach and Marketing, including materials targeting priority audiences. Based on input from CBOs and Contractors, a toolkit of the most needed materials will be developed, including materials that can be customized for events and meetings. All materials will be based on the messaging framework documents developed. Multi-lingual materials will be developed and made available based on the prioritization of targeted communities.

Campaign Execution:

The Contractor shall manage creative execution, art direction, and production of all elements, including print, broadcast, out-of-home, online, social media, and other materials recommended and approved as part of the plan. Creative concepts and campaign proposals shall be presented for NYSERDA review and approval. The Contractor shall develop a plan specifying materials to be developed, campaign schedule, advertising needs, etc. for NYSERDA approval.

Media Services:

In accordance with the approved marketing communications plan, the Contractor shall provide media services related to program elements across all potential channels including print; broadcast; and new media, such as online and social media.

A targeted media plan shall be developed for each primary audience -- residential, small Business/NFP, workforce, and contractors. The media mix will vary and will include the most cost-effective and efficient vehicles available. A mechanism to measure response rate by media vehicle will be incorporated to enable ongoing tracking of effectiveness and inform need for necessary shifts in media.

Public Relations:

A public relations (PR) campaign will be launched throughout the State to gain earned media exposure in relevant traditional and online vehicles. The PR plan will include monthly localized story pitches designed to initially highlight the program and then to highlight work under way in communities across the State, as well as seasonal and calendar-generated opportunities that provide a backdrop for educating the public about energy efficiency (i.e. Earth Day, etc.). Features will showcase program participants (residents and businesses) from all sectors, as well as CBOs supporting the effort. PR will be a primary campaign tactic enabling ongoing, cost-effective exposure. PR activities shall be closely coordinated with NYSERDA's Communications Department.

Website and Hotline:

A GJGNY Web site will help promote the program and serve as a primary information delivery mechanism. Promotional materials, PR, and advertising will drive prospects to the Web site for more information. Content features will support the PR and advertising messages and track back to existing NYSERDA and utility programs. The Contractor shall provide content and other necessary web-related materials for an engaging GJGNY Program presence on the NYSERDA.org website.

The NYSERDA Hotline will be leveraged to serve as a primary response mechanism. The Contractor shall develop scripts, program materials, and processes that assist hotline staff in responding to customer requests and inquiries.

Events

A targeted list of events will be developed and coordinated for each primary audience through NYSERDA's Consumer Services and Events Management Team. Events will create an opportunity to build GJGNY awareness, engage prospects, and build program participation.

Other

The Contractor shall provide content for participating contractors and other defined delivery channels to support their efforts to promote GJGNY.

The Contractor shall work with NYSERDA to develop a list of primary COIs for each primary audience. A coordinated communication strategy will be developed to build relationships and leverage the benefit of partnerships with COIs.

The Contractor shall develop a formal referral program to encourage residential and business program participants to refer friends, neighbors, and colleagues to the program.

The Contractor shall capitalize on the current outreach activities of the Energy Smart Communities Program, the Business Partners Program, and engage other Contractors such as Outreach Project Consultants, (OPCs) who provide general Outreach Services to customers on NYSERDA's behalf.

Measurement, evaluation, and reporting:

The Contractor shall develop a benchmark and an annual on-going tracking study to help measure and track awareness and marketing effectiveness

PROPOSAL REQUIREMENTS

The proposer must submit five paper copies of the proposal, including a completed Cost Proposal Form (Attachment A) and a schedule (Attachment B). One copy **must** contain an original signature. In addition, one electronic copy of the proposal must be submitted in PDF format via email to NYSERDAMarketing@nysesda.org. Please put the title of the Task Work Order in the subject line. This electronic document must be an exact scanned image of the final paper copy proposal and include all relevant forms and signatures.

All proposals submitted as part of this Task Work Order become the property of NYSERDA. Proposers will not be reimbursed for any costs associated with preparation of their proposals.

PROPOSAL EVALUATION

All proposals received by the due date, and meeting the requirements, will be reviewed and ranked by NYSERDA, with the selection of the Contractor expected approximately eight weeks after the due date. Final rankings and contract award will be based on the following criteria, listed in order of importance:

Responsiveness to the Program Requirements:

- Has the proposer demonstrated an understanding of the GJGNY program?
- Does the proposal adequately address all the program tasks?
- Does the proposal present a realistic and effective plan and strategy?

Comprehensiveness of Approach and Management Plan:

- Does the proposer present innovative strategies?
- Are sufficient resources being devoted to the strategic components?
- Is the plan, including the schedule and staffing plan, clear, well defined and realistic?
- Does the plan include a strategy for coordination and interaction with all of the relevant parties, including NYSERDA, key stakeholders, contractors, utilities, and various regional organizations?
- Are the Implementation plan and time line complete and do they include specific activities, target dates for completion, and responsible personnel?
- Do assigned team members provide value to the strategy?
- Does the team have the capability to adequately track, monitor, and report marketing activities?
- Are results and deliverables clearly stated and consistent with the proposer's activities?

Relevant Experience and Qualifications:

- Are the staffing plan and the qualifications and experience of staff appropriate and adequate for implementation of the strategy?

- Does the team have experience?
- Does the project lead, responsible for oversight of the program, have the skill set and managerial experience to ensure successful execution of the strategy?

Cost Effectiveness:

- Is the proposal cost effective?
- Are hourly rates and total hours reasonable and appropriate for completion of each task and for the personnel or subcontractors completing the tasks?
- Is the proposer's allocation of costs appropriate?
- Are travel costs reasonable?
- Are resources clearly described and accounted for?
- Does the budget include all identified potential expenses required to achieve successful completion of the program plan and its management?

Creativity:

- How much additional elaboration was provided for each task in the Proposal?
- How well does the Proposer make any particularly creative suggestions or ideas to achieve the goals of this Program?
- Are there any suggestions that broaden or deepen the scope of the program that might not have been requested?
- Does the proposal include areas for collaboration with other organizations?

Other:

- Is the proposal well-organized, well-written, and complete?

Contact Person: If you have any questions concerning this Task Work Order Plan, please contact Susan Andrews at 518-862-1090 ext 3234, or NYSERDAMarketing@nyserda.org.

Task Work Order Request due date:

If you are interested in bidding on this Task Work Order, please submit a complete proposal by 5:00 P.M. on October 12, 2010. Responses received after that time will not be considered. Your responses should be emailed to NYSERDAMarketing@nyserda.org (with the title of the Task Work Order in the Subject line) and mailed by Certified Mail, return receipt requested to:

NYSERDA
17 Columbia Circle
Albany, NY 12203
c/o Erin Schucker

Final Task Work Order completion date (expected date for final Statement of Work): Approximately December 15, 2011.

If Contractor is not submitting a proposal for this TWO, please send a written statement to NYSERDA advising that it will not be bidding on these services.