



San Joaquin Valley
AIR POLLUTION CONTROL DISTRICT



2021 Request For Proposal (RFP)

Advertising and Marketing Agency Representation for
Comprehensive, Multi-lingual Public Outreach Campaigns

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Section I – Introduction

Since its formation in March 1992, the San Joaquin Valley Air Pollution Control District (District) has focused on improving air quality through a variety of rules, regulations, incentives and programs in Fresno, Kings, Madera, Merced, San Joaquin, Stanislaus, Tulare and the Valley air basin portion of Kern counties. The District's mission to protect public health by improving air quality in the San Joaquin Valley relies on the public's awareness, understanding and support of the agency and its air quality improvement programs. Widespread public acceptance and implementation of emission-reducing behaviors depend on cohesive, consistent, well designed, and well-implemented public outreach programs such as the District's residential winter No Burning season, the summer Healthy Air Living program, and the numerous voluntary incentive programs.

To effectively reach specifically targeted groups, generate public interest in and support of air-quality improvement programs, and effect meaningful changes in public behavior, the District invests in multi-lingual, multi-media public awareness and educational campaigns on an ongoing basis.

The District's Outreach and Communications (OC) team is highly skilled in marketing, community outreach and media relations. This team includes two bilingual outreach representatives, a graphic designer, a web designer, and a videographer. The OC team has experience working with EJ communities, developing campaigns and programs for various target audiences, and handling media inquiries from outlets as diverse as the Los Angeles Times or the Hanford Sentinel. Our advertising agency partner should be prepared to work collaboratively with the OC team and learn extensively about the air quality issues facing the San Joaquin Valley.

The District is not merely looking for an agency to develop creative concepts and place them within traditional media markets in the Valley. Rather, the District is looking for an agency whose skill set will complement the in-house abilities of the District team and leverage air quality-appropriate opportunities to further air quality messages. The District is looking for an agency that will both understand and believe in the mission and vision of this agency and offer new, strategic and creative ideas to enhance the public outreach process. The intent of this client-agency relationship is to ensure that all Valley residents have opportunities to learn about and become engaged in the air quality improvement process. Please review the following online documents to learn more about the District's goals and work culture:

- The District's Mission, Vision and Core values underpin all District programs, initiatives and efforts. Our expectation is that our partner agency understands and shares these as goals for San Joaquin Valley.
http://www.valleyair.org/General_info/aboutdist.htm#Mission
- The S.T.A.R. (Service, Teamwork, Attitude and Respect) program is the District's internal work culture. We expect our partner agency to have a similar philosophy.
http://www.valleyair.org/General_info/STAR_web.pdf

Proposals are being solicited from advertising and marketing agencies with proven experience in the San Joaquin Valley in implementing multi-media, public outreach and educational campaigns for a variety of programs and messages in primarily English and Spanish, and secondarily in Hmong and Punjabi, within all three media markets of the District. The campaigns and funding parameters are outlined further in this document, yet may be changed prior to contract finalization.

The projected total budget annual allocation for the entire package is approximately \$800,000 per year. Furthermore, the contract could possibly be annually renewed up to four times pending evaluation of performance. An annual increase in funding is possible based on increases in media costs and evaluation of performance. **All cost estimates, proposals and potential contract renewals require approval from the District's Governing Board through an annual contract approval process and annual budget approval process.**

Advertising and public relations agencies with experience working throughout the San Joaquin Valley are invited to submit proposals for consideration as outlined in this packet. While it is not required that an agency be located in the San Joaquin Valley, current experience executing comprehensive multilingual campaigns in the San Joaquin Valley as well as a thorough understanding of the unique qualities of the Valley and the area's air quality challenges will be an important scoring criteria for this RFP process.

Again, all contracts and budgets are subject to approval by the District's Governing Board.

No bidders' conference is being offered. All questions concerning the RFP should be directed to our LinkedIn Group "Valley Air District Advertising RFP Q&A Forum" where all appropriate questions will be answered openly. Request membership at:

<https://www.linkedin.com/groups/7036758/>

District staff contact for the RFP is:
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Section II - Schedule

<u>DATE</u>	<u>EVENT</u>
March 16, 2021	RELEASE OF REQUEST FOR PROPOSAL
April 21, 2021 (5pm)	PROPOSAL SUBMISSION DEADLINE
April 2021	PROPOSAL REVIEW BY DISTRICT STAFF
By April 30, 2021	FINALIST AGENCIES NOTIFIED FOR IN-HOUSE INTERVIEWS (EITHER VIA ZOOM OR IN THE DISTRICT'S FRESNO OFFICE) WITH EXECUTIVE MANAGEMENT
Week of May 3, 2021	AGENCY INTERVIEWS AT DISTRICT OFFICE (Note that these will not be creative pitch meetings but rather interviews related to the Agency's culture, knowledge, strategy and capacity related to the District's needs.)
May 2021	POTENTIAL ADDITIONAL INTERVIEWS OR DATA GATHERING
Late May, 2021	FINAL SELECTION ANNOUNCED
June 17, 2021	CONTRACT PRESENTATION TO DISTRICT GOVERNING BOARD FOR PUBLIC COMMENTS AND CONSIDERATION FOR FINAL APPROVAL
July 1, 2021	PROPOSED CONTRACT START DATE
YEAR ROUND	DEVELOP AND IMPLEMENT MEDIA CAMPAIGNS AND EVENTS
June 30, 2022	CONTRACT END DATE (potential for four annual renewals)

Section III – Background

The San Joaquin Valley air basin struggles with attainment issues for two primary pollutants: ozone, which is generally a summertime problem; and particulate matter (PM), which is generally a problem during fall and winter. Accordingly, the District has supplemented its “toughest in the nation” regulatory program with a growing number of voluntary and educational programs tied to personal action and in some cases supported with grant funding. The District’s Grants and Incentives Department implements numerous grant programs to augment the regulatory actions of the District. Additionally, as the District is faced with meeting tough, federal air quality standards, it is becoming more important for the public to take a proactive role in reducing emissions.

Since its formation, the District has developed more than 600 rules and amendments, which have reduced emissions from stationary sources – the District’s sole regulatory authority – by 80 percent. However, vehicle use – including diesel truck traffic traveling through the air basin on the two major arteries of Highway 99 and Interstate 5 – accounts for over 80 percent of the air basin’s current overall pollution problems. (For more details about the District’s accomplishments and challenges, review the District’s latest Annual Report at https://www.valleyair.org/General_info/pubdocs/2019-20-Annual-Report.PDF).

This Request for Proposals includes several components and focus areas, which should each be viewed as a part of an overarching District strategy to further air quality improvements. In essence, the selected agency will become the agency of record for the District, and will play a key role in developing the District’s messages and furthering the District’s mission.

Section IV – Project Specifications

This Request for Proposals process includes two primary components: a written proposal and an in-house interview. Only agencies scoring in the top three after evaluation of the written proposal will move on to the in-house evaluation scheduled for the first week of May 2021. Each of the two components stands alone. That is to say, the written proposal scores will only be used to narrow the field to three finalists. While the interview team will have access to the written proposals, the ranking and scores from the written proposals will not be considered during the final evaluation and selection of the winning agency. It is assumed that all agencies reaching the final round of interviews have the technical skill set and staffing expertise to fully and successfully execute the campaign. The final round of interviews will primarily assess the agencies' understanding of the District's mission and the challenges of the San Joaquin Valley overall, ability to efficiently and effectively leverage the budget for the best results and the potential for a productive relationship with the entire District team (from Governing Board members and the Executive Director, down to the staff in the District's Outreach and Communications department).

We anticipate the initial annual contract budget to be approximately \$800,000, which will be broken loosely into three components:

- \$350,000 for winter residential No Burn outreach (may include: social, digital, outdoor billboards, print, TV, radio, other efforts as deemed valuable)
- \$300,000 for summer outreach, primarily a *Healthy Air Living* message (may include: social, digital, outdoor billboards, print, TV, radio, other efforts as deemed valuable)
- \$150,000 for additional programs
 - AB 617 Community Outreach Program <http://community.valleyair.org/>
 - Various other District grant programs <http://valleyair.org/grants/>
 - Various District-hosted events such as symposiums

To gain insight into past District Campaigns, you can review past commercials here: http://www.valleyair.org/videos/video_idx.htm

Again, please note that the budget may change and is contingent on approval from the District's Governing Board.

The chosen agency will be required to develop and implement comprehensive, multi-lingual paid and public-service advertising campaigns. The program costs are to include all media placement, agency fees/commissions, production costs, materials, subcontractor fees, travel expenses and any contingency fees. The District may also ask the agency to assist in the coordination and promotion of large events.

If approved by the Governing Board, the term of the contract will be our fiscal year, from July 1, 2021 to June 30, 2022. The contract will include an option for four annual renewals,

each for approximately 12 months, pending a performance evaluation and approval by the Governing Board annually.

An authorized representative from the selected agency must be available for project meetings throughout the life of the contract. The project meetings will be held online via Zoom, at the District office in Fresno or in the agency's office, as determined by the District. The meetings will be set as needed throughout the year to discuss, develop, review, edit and revise the strategies for the various campaigns. It should be noted that the advertising agency may be called upon with very short notice to assist the District staff with unexpected high priority needs. The selected agency will need to be extremely flexible and very responsive to the District. The District will not reimburse the agency for travel associated with these types of meetings.

All campaign strategies, advertising concepts, budgets, on-air talent, ad copy and scripts must be submitted to the District in advance for review. The District reserves final editing and approval rights for any concept, spots and/or copy.

Upon acceptance of the contract with the District, the selected agency will be responsible for procuring copyrights to music tracks, photos, sound effects and/or other licensed creative material. The agency is to disclose sources of music/SFX libraries and copyright terms, conditions and agreements in advance.

Upon notification of the project award, the agency will furnish the District with written proof of commercial general liability insurance with minimum limits of coverage in the amount of two million dollars per occurrence; automobile liability insurance which covers bodily injury and property damage with a combined single limit with minimum limits of coverage in the amount of two million dollars per occurrence; and workers' compensation insurance, as required by California law.

The agency will supply the District with full-color electronic comps of any billboards and printed pieces produced, as well as proof of performance for all outdoor and print placements. The agency will supply the District with high-resolution post-production duplicates of all broadcast spots for District exhibition purposes. Whenever possible, the District will utilize electronic files and requests that the selected agency follow similar protocols.

The District reserves ownership rights to all concepts and advertising developed for the various campaigns, including all raw footage and photography shot exclusively for the District. Everything produced, created and developed for the District will be considered work for hire.

Section V - Written Proposal Contents

All proposals must follow the format outlined below, and all of the requested information must be supplied in a proposal packet and received at jaime.holt@valleyair.org or in the District Central Office, 1990 E. Gettysburg Ave., Fresno, CA 93726 by **5 p.m. on Wednesday, April 21, 2021**. Incomplete proposals or proposals arriving after the deadline will be automatically disqualified from consideration. **No exceptions or extensions will be granted.** If you have any size-related challenges emailing your proposal, please call Jaime Holt at 559-309-3336 prior to 5 p.m. on April 21, and we will address any issues.

Written proposals may not exceed **FORTY (40) TOTAL** electronic 8.5x11 inch pages (this includes any cover page, cover letter, closing page and sample work submissions). If submitting a hardcopy version of the proposal, this can be 20 pages printed on both sides.

All proposal packets must contain the following:

- A. Cover Letter: Include the name, address, telephone number, email and signature of the person authorized to commit the agency to the terms specified in the proposal.
- B. Summary of Qualifications: Provide a description of the agency's capabilities:
 1. Number of years in business.
 2. Brief description of the key staff's professional experience and hourly pay rate (highlight environmental or government experience).
 3. Address the District's high expectations regarding:
 - a. Product quality,
 - b. Need for agency flexibility and accessibility,
 - c. Efficiency and understanding of the limitations of taxpayer-funded programs,
 - d. Budget management expertise,
 - e. Unique qualities of public agency, and
 - f. Timely turnarounds.
 4. Explain in-house multi-lingual outreach capabilities regarding:
 - a. Key Spanish speaking staff or subcontractors
 - b. Experience producing Spanish language TV, radio, outdoor and print advertisements
 - c. Experience reaching the Valley Spanish speaking population beyond traditional media outletsProvide any recommendations your agency might have to improve the District's outreach to the Valley Spanish speaking population.
 5. If possible, detail current experience working with at least two (2) air quality, environmental or public agencies in the San Joaquin Valley. Work should be current; should include TV, radio, print, outdoor, social media development and placement; and should list any subcontractors used. If you do not have two samples of work from air

quality, environmental or public agency, other work may be submitted but may not receive the same level of points

6. Provide a detailed professional bio, including hourly pay rate, of the proposed Account Executive who would be assigned to this account. **(15 points)**

- C. Understanding of the San Joaquin Valley: Explain your agency's understanding of the San Joaquin Valley including all relevant factors which could potentially impact the effectiveness of the District's outreach programs such as demographics, political realities, etc. **(10 points)**
- D. Key Air Quality Challenges and Opportunities in the Valley: Outline your agency's view of the key challenges and opportunities in the Valley with regard to air quality. **(10 points)**
- E. Media Planning and Buying: Detail your agency's experience in researching, planning and buying media in the San Joaquin Valley's three media markets, submit examples of past media plans and include rationale and budget numbers. In addition, discuss the challenges related to purchasing TV for San Joaquin and Stanislaus Counties and how your team might address those challenges. Include your agency's success with acquiring value added to any previous media buy. *Detail the proposed structure for commission rates or flat fee pricing that you would expect to receive off media placed under this contract.* **(15 points)**
- F. Social Media, Digital and OTT: Detail your agencies experience in researching, planning and buying social, digital and OTT media for public agencies operating in the San Joaquin Valley. Review the District's Facebook and Twitter social media platforms and make suggestions as to how we might be able to better leverage paid advertising on these platforms. **(15 points)**
- G. Budget and Billing: Submit a sample budget/media plan for the 2021-22 winter residential wood burning reduction program to include the following in all media markets of the Valley. Assume a \$350,000 total budget (do not include any carve out for creative or production) and a wide target audience of adults 18 and up throughout the Valley. Propose a plan that will most effectively and efficiently reach our target audience.

Include estimates of media placement costs. The District is aware that these will be cost estimates, yet they should be in line with what your agency can negotiate if receiving the District contract. Inability to acquire actual media buys that are within 10% of the estimated value presented in this budget may be grounds to terminate your agreement with the District.

Also, include proposed agency commission rates or flat fees, agency staffing costs, and overhead or additional costs that will be paid directly to the agency. Be aware

the District is looking for an agency to propose their lowest possible commission rate and staffing fees. **(20 points)**

- H. Sample Work Submission (Portfolio) -- Please submit representative samples for three current campaigns the agency has developed and coordinated within the San Joaquin Valley. The portfolio must contain a project summary sheet outlining the goals and successes of each campaign and must reflect experience working with TV, social, digital, outdoor and advertising as appropriate. The portfolio must also include a work summary page identifying any subcontractors used in each campaign and detailing the work completed by each one. If possible, the portfolio should highlight multi-lingual campaigns developed for public agencies. Since this RFP is not requesting spec creative work as part of the RFP process, the work portfolio will demonstrate an agency's ability to execute the District's campaigns. **(10 points)**
- I. References - Provide three client references (with current phone numbers, email addresses and the name of an appropriate contact person) for which the agency has produced a comprehensive bilingual advertising and public outreach campaign. If possible, the references should be with clients representing public agencies within the San Joaquin Valley. **(5 points)**

Section VI – Written Proposal Evaluation & In-House Interview Details

An evaluation committee comprised of District staff will review and score the written proposals. Under the description of each of the elements to the written proposal, a point value has been assessed. The District is looking for, among other things:

- accuracy,
- thoroughness,
- technical ability,
- accessibility,
- topic area knowledge,
- flexibility,
- creativity,
- fiscal accountability,
- an understanding of the limitations of public agencies,
- budget management, and
- an ability to follow the directions of the RFP.

The three agencies with the highest scores will be invited to an interview in the District's Fresno office (or via Zoom) with selected District management to discuss topics such as, but not limited to:

- agency qualifications,
- understanding of Valley and air quality key issues,
- potential for collaboration and teamwork
- budget allocation and leveraging ability,
- media buying ability and experience,
- creative development and implementation abilities
- overall partnership approach, and
- potential for innovation and entrepreneurship.

The in-house interview will not be a typical agency creative pitch. If an agency gets to the in-house interview stage, it is assumed the agency has already demonstrated the skills and abilities to successfully implement this type of large multi-lingual, multi-region, multi-target campaign. Therefore, the in-house interview will be a less formal process -- really an opportunity for a dialogue on a potential partnership with emphasis on the agency's ability to leverage the District budget. Additional details on the in-house interviews will be given to the three finalists upon scheduling of the meetings.

Additionally, the District reserves the option to visit finalist agencies to assess staffing levels, work style, equipment and customer-service philosophy.

The selected agency will be notified by telephone and in writing of project award and will be requested to submit a signed contract and proof of insurance within the specified time period.