



San Joaquin Valley

AIR POLLUTION CONTROL DISTRICT

Request for Proposal (RFP)

**Advertising and Marketing Agency
Representation**

**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 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 Air 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. Acceptance of concepts such as alternative commute options, as well as specific Air District projects such as the Check Before You Burn and Healthy Air Living, depends on widespread lifestyle changes in response to public calls to action.

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 Air District invests in multi-lingual, multi-media public awareness and educational campaigns on an ongoing basis.

The District is committed to providing outreach to all Valley residents. In the past six years, the District's Governing Board has approved a substantial expansion to the overall outreach strategy, the multi-lingual programs and the work in environmental justice (EJ) communities.

The District's eight-person Outreach and Communications (OC) team is highly skilled in marketing, community outreach and media relations. This team includes two Spanish-speaking outreach representatives and outreach representatives based in Modesto and Bakersfield. 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 New York Times or the Hanford Sentinel. Our advertising agency partner should be prepared to work extremely collaboratively with the OC team.

The Air District is not merely looking for an agency to develop creative concepts and place them with 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 OC 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. The intent of this client-agency relationship is to ensure that all Valley residents have opportunities to learn and become engaged in the air-quality improvement process.

Proposals are being solicited from advertising and marketing agencies to implement 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 up to \$900,000. Furthermore, the contract could possibly be 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 dollar figures and potential contract renewals are pending approval from the District's Governing Board through an annual contract approval process and annual budget approval process.**

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

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

All inquiries concerning the RFP should be directed to:

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Section II - Schedule

<u>DATE</u>	<u>EVENT</u>
NOVEMBER 15, 2010	RELEASE OF REQUEST FOR PROPOSAL
JANUARY 10, 2011	PROPOSAL SUBMISSION DEADLINE
JANUARY 10 -31, 2011	PROPOSAL REVIEW BY DISTRICT STAFF
BY JANUARY 31, 2011	FINALIST AGENCIES NOTIFIED FOR IN-HOUSE INTERVIEWS IN THE DISTRICT'S FRESNO OFFICE
FEBRUARY 2011	AGENCY INTERVIEWS AT DISTRICT OFFICE
MARCH 1, 2011	FINAL SELECTIONS ANNOUNCED
MARCH 17, 2011	CONTRACT PRESENTATION TO GOVERNING BOARD FOR PUBLIC COMMENTS AND CONSIDERATION FOR FINAL APPROVAL
MARCH 17, 2011	PROPOSED CONTRACT START DATE
YEAR ROUND	DEVELOP AND IMPLEMENT MEDIA CAMPAIGNS AND EVENTS
MARCH 1, 2012	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 Air District has supplemented its regulatory authority with a growing number of incentives for voluntary programs to reduce these pollutants. The District's Strategies and Incentives Department implements numerous grant programs to augment the regulatory actions of the District. Additionally, as we are 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 500 rules and amendments, which have reduced emissions from stationary sources – the District's sole regulatory authority – 75 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 about 80 percent of the air basin's current overall pollution problems. (For more detail about the District's accomplishments and challenges, visit www.valleyair.org.)

The District also, in 2008, retired its longtime Spare the Air summertime, voluntary emission-reduction program, and unveiled Healthy Air Living, a year-round, broad-based program, which has also expanded to include regulatory measures. Healthy Air Living encompasses both summertime, voluntary efforts and the wintertime regulation, Check Before You Burn, which restricts residential wood burning. While Healthy Air Living does not require rebranding, this program is a major component of advertising and outreach by the District. (For more information about Healthy Air Living, visit www.healthyairliving.com and www.airelimpiovidasana.com.)

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 Proposal 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 February 2011. 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. 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 assess the agencies understanding of the District's public mission, the challenges of the San Joaquin Valley overall and the potential for a productive relationship with the entire District team (from Governing Board members, to the Executive Director, down to the OC staff).

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. Furthermore, the selected agency will, in essence, become a part of the District's Outreach and Communications Department. It is the hope of the District, that the selected agency will have a complete understanding of District operations and actions and be a valuable partner in guiding strategy.

We anticipate the initial contract budget to be approximately \$900,000 will be broken into three components:

- \$450,000 for winter outreach *Check Before You Burn*
- \$350,000 for summer outreach, primarily a *Healthy Air Living-One Change* message
- \$100,000 for additional programs
 - *Clean Green Yard Machines* lawn mower trade-in program,
 - *Burn Cleaner* fireplace and wood stove replacement program,
 - Various other District grant programs,
 - Various District-hosted events such as symposiums.

Please note that 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 paid and public-service advertising campaigns in the proposed languages. The program costs are to include all media placement, agency fees, production costs, materials, subcontractor fees, travel expenses and any contingency fees. The District will also ask the agency to implement non-traditional outreach and to possibly assist in the coordination of promotional events.

If approved by the Governing Board, the term of the contract will be for approximately one year, from March 17, 2011 to March 1, 2012. The contract will include an option for four annual renewals, each for approximately 12 months.

An authorized representative from the contracting agency must be available for project meetings throughout the life of the contract. The project meetings will be held at the Air District office in Fresno or in the agency office, as determined by the District. The meetings will be set as needed throughout the year and held with the Air District's OC team 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 PR 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 for review by Air District staff and management. The Air District reserves final editing and approval rights for any concept, spots and/or copy.

Upon acceptance of the contract with the Air District, the selected agency will be responsible for procuring copyrights to music tracks, photos, sound effects and/or other licensed creative material. The contractor 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 Air District with written proof of workers' compensation and liability insurance. Additional insurance requirements will be outlined in the contractual agreement.

The agency will supply the Air District with full-color electronic comps of any billboards and printed pieces produced, as well as post-production dubs of all broadcast spots for Air District exhibition purposes. Whenever possible, the District will utilize electronic file portability and requests that the selected agency follow similar protocols.

The Air District reserves ownership rights to all concepts and advertising developed for the various campaigns and the RFP process, including all raw footage and photography shot exclusively for the Air 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 in the Air District Central Office, 1990 E. Gettysburg Ave., Fresno, CA., 93726 by 5 p.m. on Monday, Jan. 10, 2011. Incomplete proposals or proposals arriving after the deadline will be automatically disqualified from consideration. **No exceptions or extensions will be granted.**

Written proposals may not exceed 20 sheets of paper including the cover letter. This means paper 8.5 X 11 inches and printed on both sides, therefore total printed pages can be 40. The 20-page maximum does not include sample work submissions (portfolio). An original plus four copies must be provided for the review panel.

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 (highlight environmental or government experience).
 3. Address the District's high level of 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. Detail any in-house media production capabilities.
 5. Explain in-house multi-lingual outreach capabilities and list all anticipated subcontractors, equipment needs and sources.
 6. Detail past experience working with at least two air quality or environmental agencies, sample work for these campaigns can be placed in the "sample work" section and referenced.
 7. Provide a more detailed professional bio 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. (20 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. (15 points)

- E. Innovation – New Media and Social Marketing: The District does not intend for this partnership to be based solely on the placement of traditional media advertisement. The OC team already conducts outreach on a variety of social media outlets. Please explain ways that your agency and the District OC team could strengthen our presence in new media. Note: do not propose any new websites or redesigns of current websites. The District manages all websites in-house and our advertising agency should not anticipate having a role in that process. (10 points)
- F. Sample “Call to Action” – Episodic Notice Campaign: Although the District retired our Spare the Air episodic call to action program several years ago, there has been a request by our Governing Board to reinstitute some type of episodic call to action on those days when it is anticipated that we might exceed the 1-hour standard for ozone. The reason for this is the \$29 million penalty the District faces under Section 185 of the Clean Air Act. Please detail a potential strategy for this episodic campaign. Tell us your agency’s ideas and approaches for this campaign and outline the key elements. Please explain any strategies that will help avoid messages which might conflict with our Healthy Air Living program. (10 points)
- G. Sample \$450,000 Media & Outreach Plan with a Detail Explanation of the Plan’s Strategy: Our partnership with our advertising agency encompasses two major seasons: summer and winter. During each season, we run a large, comprehensive campaign. Please detail appropriately a large potential summer Healthy Air Living campaign. Tell us your agency’s ideas and approaches for this campaign and outline the key elements. (15 points)
- H. Sample \$20,000 incentive grant outreach plan: The District’s grant programs have become incredibly important in the past few years. We have several grant programs that target large sections of the Valley population and we often launch small campaigns to promote these programs. Please detail appropriately a campaign for our Burn Cleaner Woodstove Change-out program. Tell us your agency’s ideas and approaches for this campaign and outline the key elements. (5 points)
- I. Sample Work Submission (Portfolio) -- Please submit representative examples for three campaigns the agency has developed and coordinated. The portfolio can include work executed in any media, but must contain a project summary sheet outlining the goals and successes of each campaign. 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. (5 points)

All portfolios and sample work submitted will not be tallied in the 20-page limit for the main proposal and will be returned by mail unless arrangements are made to retrieve them in person from the District office.

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 and, ideally, bilingual advertising and public outreach campaign. If possible, the references should be with clients representing public or environmental agencies. (5 points)

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

An evaluation committee comprised of District staff and possibly one outside public relations specialist 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,
- creativity,
- technical ability,
- accessibility,
- topic area knowledge,
- flexibility,
- fiscal accountability,
- an understanding of the limitations of public agencies,
- budget management, and
- an ability to follow the direction of the RFP.

The three finalists with the highest scores will be invited to an interview in the Air District's Fresno office with selected District management to discuss topics such as, but not limited to, agency qualifications, understanding of key issues, budget allocation and the overall campaign approach. Each agency will be allocated one hour for the interview. Additional details on the in-house interviews will be given to the three finalists upon scheduling of the meetings.

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 the skills and abilities to successfully implement this type of large multi-language, 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.

Additionally, Air District staff has 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.