



Name creation, brand strategy and identity package
for a new electric vehicle nonprofit organization

Q & A on Request for Proposal (RFP)

Updated: August 4, 2016

This document addresses all questions submitted to date. The deadline for questions was 5 p.m. (PDT) on Wednesday, August 3, 2016. Below are final answers.

The deadline for RFP submittals is 5 p.m. (PDT) on Tuesday, August 9, 2016.

General RFP Clarifications:

This RFP is a separate request and not part of the RFI issued earlier last month by the PEV Collaborative.

July 28, 2016

Q1: Do you wish to see work related samples? If so, how many?

A1: Work samples are appreciated, keeping in mind the six-page maximum for the response. Web links to samples will be accepted if you choose to include them.

August 2, 2016

Q2: Does the PEV Collaborative have any existing research (or other data) regarding the level of awareness and the relative perceptions of the PEV Collaborative among the California general public?

A2: No, we don't have research or data of this type.

Q3: Are there aspects of your internal review and approval process that would impact the project timeline that we develop?

A3: While we don't anticipate review or approval delays over the eight-week project timeframe, we expect to have the contract conclusion date be December 1, 2016, for contingency purposes.

August 4, 2016

Q4: What is the scope of your entity and its operations? Will you be in CA only, or eventually will you scale to national level?

A4: At this time, we are a California-focused organization and have no plans for a national-scale operation. We are, however, deeply networked across the country.

Q5: How strictly must we adhere our proposal response to the defined format? Is there flexibility for us to re-structure formatting to better fit our unique approach to the scope of work? For instance, our proposals have a thoughtfully presented format that we've tailored and optimized from experience. By fitting our proposal to your 6-page guidelines, there's a risk that something from our usual structure might get lost in translation.

A5: We encourage a succinct, creative approach to the RFP responses, including content, structure and format; however, there is a six-page limit.

Q6: Can we attach an appendix to our RFP response (with relevant case studies, examples, etc)?

A6: See response to Q1.

Q7: In the RFP, there is a request for three fully developed concepts that include all logos, newsletter images, letterhead, etc. Would a response that provides three concepts with logo design for review and comments first be accepted with the incorporation of the other elements of the creative package after a logo has been approved?

A7: If the contractor recommends changing the order of completion for the three main tasks (Tasks 2-4), we are open to exploring that option. The contractor is required to devise an overall plan (a detailed schedule that includes dates, tasks and responsible parties) for the project (Task 1), and individual detailed plans for the review and approval steps for Task 2, 3 and 4 that will be approved by PEV Collaborative staff and member-leaders. It is assumed that each plan would be a result of close communication and coordination with the PEV Collaborative representatives and the contract manager. At this time, we have no preconceived overall or task plans and would rely on the contractor to make recommendations.

Q8: What level of involvement and engagement is expected from the PEV Collaborative Board members in this process? Are there any organizations and individuals outside of the Board that would be a part of this process, and, if so, to what extent would they be engaged?

A8: While we anticipate putting together an efficient review timeline, our member-leaders will have to weigh in and review and approve the decision-making process. We anticipate the contractor will lay out a detailed timeline that includes key decision-making milestones that will require review and/or approval. We have not yet selected specific member-leaders or others who will be part of the process beyond PEV Collaborative staff and the chair. See also response to Q33.

Q9: For in-person meetings, is there an expectation that those meetings would take

place in Sacramento? Would it be possible to have these meetings take place where the firm is domiciled if still within California?

A9: We anticipate the kickoff meeting to be held in Sacramento. While we prefer the contractor attend this meeting in person, we have made a provision for it to be conducted via teleconference if the contractor is unable to do so. Sacramento is expected to be the base for all other meetings and teleconference attendance by the contractor is acceptable for routine meetings. We expect to work with the contractor and use their expertise to determine when and if in-person meetings are the best option for particular task completion.

Q10: Are in-person meetings required and/or strongly recommended throughout this process and if so, would video conferencing be an acceptable substitute to ensure costs are directed toward project deliverables and not travel?

A10: See response to Q9.

Q11: Does the PEVC have any objections to an applicant utilizing advisors who are employed by PEVC member organizations (to gain their industry-specific expertise)?

A11: The PEV Collaborative will provide organization and program background, and access to its members as part of this project.

Q12: Please confirm you want the proposal delivered only electronically, no hard copies are required.

A12: Electronic submission of proposals are due no later than 5:00 p.m. (PDT) August 9, 2016, to gpaauwe@pevcollaborative.org . No hard copies will be accepted.

Q13: If bidder interviews are conducted, will they be in-person or via teleconference? If in-person, where will they take place?

A13: Bidder interviews will be conducted at the PEV Collaborative's option. If additional bidder vetting is needed, the meeting would be held in Sacramento and would be offered via teleconference should the bidder be unable to attend in person.

Q14: Will the contractor be expected to attend in-person meetings in Sacramento?

A14: See response to Q9.

Q15: Regarding the contractor payment schedule, can you clarify what are the three phases that are to be completed?

A15: The payment schedule's three phases refer to completion of Tasks, 2, 3 and 4 with

a 10 percent holdback to be paid upon completion of the final deliverables. Task 1 and Task 5 are considered part of the overall project and bolster efforts to successfully complete Tasks 2-4.

Q16: What is the difference between the deliverable “detailed schedule that includes dates, tasks and responsible parties” in Task 1, and the deliverable “Provide a plan ... [to] recommend specific strategies, timelines and steps for how each task would be taken...” in Task 5.

A16: Task 1 requires the contractor to deliver an overall schedule, etc. for the entire project, while Task 5 requires the contractor to devise an individual, specific plan for each of the following: Task 2, Task 3 and Task 4.

Q17: Task 2, first level vetting can be accomplished within the allocated budget. Is there additional budget available for second-level vetting which will require the services of an attorney expert in this area?

A17: We expect the contractor to do as much vetting (via online research, available database searches and other reasonably accessible documents or methods, etc.) as possible before any of the final organization name recommendations are presented to our leadership. The PEV Collaborative will then use its own legal firm – at no cost to the contractor – to determine if the final name selection is officially registered by another organization (which would bar its use). It is important that the contractor completes this initial vetting process thoroughly so the PEV Collaborative can avoid spending more than needed on legal counsel.

Q18: Given that the name-vetting process can possibly take several weeks, is the PEV Collaborative willing or able to be more flexible regarding the 8-week timeline?

A18: See response to Q3.

Q19: In Task 3, you call out the organization’s constituents. Who does the PEV Collaboration perceive its constituents to be?

A19: Primarily, the constituents – or audience – to keep in mind is the general public, particularly average/mainstream California consumers.

Q20: In Task 4, please clarify what is meant by bullet “positioning statement”? Typically, a positioning statement would be covered in the brand strategy document (Task 3).

A20: The positioning statement should be a concise version of the organization’s vision and mission statement. It would be used on communication pieces such as news releases, brochures, the web, social media pages and possibly letterhead, for example. If the contractor determines the positioning statement should be a part

of the brand strategy, we are open to exploring that option.

Q21: Task 4, states “other associated visual elements” – will the contractor propose these items or will the PEV Collaborative determine those later?

A21: We would like the contractor to make any additional recommendations for visual elements that may not already be listed.

Q22: As part of the new entity (page 1, paragraph 5 and page 2, paragraph 1), will the organization reconstitute its membership or change its strategic plan to reflect the new public-facing orientation?

A22: We are currently working on bylaws, a business plan, and a member structure for a new nonprofit entity that will supplant the PEV Collaborative. This effort is based on creating an organization that is public-friendly, consumer-oriented, and working to increase EV awareness and boost EV sales in California.

Q23: Will the PEV Collaborative continue to exist?

A23: See response to Q22.

Q24: Does the 8-week timeline include kick-off activities and final approval?

A24: Yes, and see response to Q3.

Q25: Is it essential or critical that the work be done in phases as outlined in Tasks 2, 3 and 4? That is, must work be completed and approved first in Task 5, then in Tasks 2 and 3 before work can be started on Task 4?

A25: See response to Q7.

Q26: How does the work included in this RFP, specifically the brand positioning work, connect to the outreach campaign? How does it connect to the larger PEV Collaborative?

A26: In July 2016 the PEV Collaborative issued a Request for Information (RFI) to scope a statewide public outreach campaign on plug-in electric vehicles. We are in the process of scheduling meetings with selected responders. Through the RFI process, we expect to gain insight and knowledge that will assist in preparing a robust and focused RFP for a statewide public outreach campaign on plug-in electric vehicles under the new entity. Until the subsequent RFP is prepared and funded, we do not have a specific outreach campaign. It is expected, however, that the work being done on this RFP (name, brand, visual identity) will be a major consideration in the outreach contract work when it is awarded. The PEV Collaborative will be supplanted by the new organization, but we expect that the

new entity's mission and vision will include some elements of the PEV Collaborative's charter.

Q27: Would there be an option of conducting the brand positioning work prior to the naming assignment, so that the name can speak to any positioning decisions?

A27: See response to Q7.

Q28: When thinking about a new positioning - would this be a change in values, or a formal expression of existing values?

A28: We think it could be a combination. We are asking the contractor to facilitate this discussion and help us come to consensus on a succinct, focused version of brand positioning.

Q29: Are there any pre-existing positioning documents that have been used to date? If so, would the chosen contractor have access to this work?

A29: See response to Q22. Yes, the contractor will have access to the work being completed and the staff who are working on these documents.

Q30: What's the number one takeaway we would want the organization name to communicate?

A30: We expect the facilitated discussions around naming and branding to bring out a very specific answer to this question. At this time, we anticipate the discussions to likely include these themes (in no particular order):

- Electric vehicles
- California
- Emission-free
- The best choice

Q31: In the RFP, it mentions the contractor will initially provide "a minimum of three (3) organization name recommendations" and a "plan for coming to consensus on the final choice". Should that plan account for multiple rounds of revision on the proposed three (3) names, or multiple presentations to different members of the PEVC of the three selected names?

A31: It is expected that the contractor will work with our member-leaders and staff to devise a plan for getting to consensus on the organization name. The plan should include steps that allow opportunities for revisions, but we want to work with the contractor to determine the overall actions and steps that will get us to the desired result.



Q32: Once vetted, is the contractor legally responsible for the organization name registration and any hard costs associated?

A32: See response to Q17.

Q33: Who are the main decision makers in the PEV Collaborative? Will names, positioning, and visual identity work be reviewed by all Collaborative members, and will they be providing feedback?

A33: The member-leaders of the PEV Collaborative include the steering committee and its chair, as well as the organization's executive director. In addition, PEV Collaborative staff will be leading the project for the organization and will be included in all meetings and decision-making processes. We do not anticipate that all 46 member organizations will participate in the review process or be giving specific feedback on individual project deliverables. Rather, a subset of member-leaders (to be determined, but most likely steering committee members) and possibly others will be taking on this role. The full PEV Collaborative will be advised of progress and presented with milestone decisions by the executive director as the project rolls out.