

REQUEST FOR PROPOSAL

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

Release date: July 26, 2016

1. GOAL

California is a global leader in electric vehicle (EV) sales with more than 215,000 cars on the road. However, even though the current EV models have been marketed and sold for more than six years, awareness of the benefits and availability of EVs is low and must increase to meet California's aggressive goal of 1.5 million zero-emission vehicles on the road by 2025. This has propelled the PEV Collaborative to develop a new public-private partnership that will focus on launching a statewide campaign to increase awareness and accelerate sales of EVs in California.

The intent of this Request for Proposal (RFP) is to create an organization name, brand, and a comprehensive visual identity package in support of the new entity and its goals.

2. BACKGROUND AND PROJECT DESCRIPTION

The California Plug-In Electric Vehicle Collaborative (PEV Collaborative), created in 2010, is a public-private organization focused on accelerating the adoption of plug-in electric vehicles (PEVs) to meet California's economic, energy and environmental goals. Using the expertise of each member, the PEV Collaborative, **convenes**, **collaborates** and **communicates** on emerging PEV market trends and works to address challenges to enable a robust PEV market.

The PEV Collaborative membership (<http://www.pevcollaborative.org>) includes elected and appointed officials, automakers, utilities, infrastructure providers, government organizations, research universities, environmental organizations and others.

During its first five years, the PEV Collaborative primarily operated as a business-to-business entity with the primary consumer base being early EV adopters. In the last year, the organization has started to become more public facing with the goal of bringing EVs to the mainstream consumer market. The new entity's focus will work to **engage**, **educate**, **empower** and provide hand-on **experience**. With this in mind, the new entity must position itself as public-friendly and consumer-oriented with a focus on mainstream markets while continuing to maintain core values of **convene**, **collaborate** and **communicate**. The core focus will be on plug-in EVs in the early years, but a flexible approach is needed so the organization may later include other zero-emission vehicle technologies at its option.

In summer 2016, the PEV Collaborative is working to launch a new 501(c)3 entity. A new name, brand strategy and visual identity package are key to a successful launch of the new organization.

4. SCOPE OF WORK:

This RFP solicits interest from public relations firms, brand managers, marketing experts and similar specialists that would provide the following:

1. Facilitate the naming of the new entity to reflect the focus of the organization
2. Provide associated branding for the new organization
3. Create a visual identity package for the new organization, including a logo, and a style guide for its use

Task 1: Project Kickoff

The contractor will meet with PEV Collaborative staff and a select team of PEV Collaborative members in person or via teleconference to go over the project history, tasks, timeline and desired outcomes. Following the kick-off meeting, the contractor will work to finalize a detailed schedule that includes dates, tasks and responsible parties.

Task 2: Facilitate the Renaming of the Organization & Provide Final Recommendation

Using proven methods, facilitate the renaming of the PEV Collaborative with consideration of the organization's new consumer-facing focus and the continuance of the core values of the PEV Collaborative. Working with PEV Collaborative staff, the solicitation and documentation of feedback from select PEV Collaborative members and other stakeholders is key. It is expected that this would include a combination of in-person and teleconference meetings, and other feedback-gathering methods as recommended by the contractor.

Any organization names that are considered should be vetted to ensure they can be legally used and are not already registered by another entity.

A minimum of three (3) organization name recommendations should be presented to PEV Collaborative leadership, with a plan for coming to consensus on the final choice. Once that plan is approved, the contractor shall carry out the plan so that current members of the PEV Collaborative can successfully choose the final name of the organization.

Throughout this naming process, the contractor will take detailed meeting notes and provide updates on an agreed schedule to the PEV Collaborative contract manager. A

final executive-level recommendation should be presented in a document no more than two (2) pages in length for PEV Collaborative members.

Task 3: Brand the Organization

In conjunction with renaming the PEV Collaborative, facilitate and determine branding for the organization. In consultation with PEV Collaborative staff and member-leaders, determine how the organization would like to be perceived through its identity with the goal of moving its constituents to action. Put the entity's core values to paper, including brand purpose, personality and promise.

Through facilitation, work with PEV Collaborative members and staff to come to consensus on final branding. Make recommendations on what the organization can do to consistently reinforce its brand through its staff, members, contractors, supporters, interactions with others and communications strategies.

Prepare a one (1) page final report that succinctly and clearly lays out the organization's brand.

Task 4: Create a Visual Identity Package for the New Organization, Including Logo and Style Guide

Following the selection of the organization's name and delineating its brand, the contractor will create a complementary visual identity and logo package, including a guide for its consistent use. This task includes working with PEV Collaborative members and staff, and facilitating the selection of the final package.

A minimum of three (3) recommendations should be presented and should include:

- Logo in color, and a black and white version
- Letterhead and stationery system
- Color palette
- Font guidelines
- Social media icon and header set (specifically for Twitter and Facebook)
- Electronic newsletter masthead and footer
- Positioning statement
- Other associated visual elements

The contractor will facilitate the approval process and final selection of the visual identity package, logo and guide. With the final selection, the letterhead and logo should be created in JPEG and EPS formats for use with Microsoft Word, MailChimp and InDesign. All files should be provided in low- and high-resolution formats.

As a final report, the contractor will prepare and deliver the package in a format no longer than five (5) pages that delivers the final recommendation, why it was chosen and visually represents the key elements of the package. The associated use guidelines may be attached as an addendum.

Task 5: Approach and Process for Tasks 2, 3 and 4

Provide a plan for the approach and process to be taken for Tasks 2, 3 and 4. Recommend specific strategies, timelines and steps for how each task would be taken from concept to final decision-making and approval through consensus building.

4. CONTRACTOR QUALIFICATIONS:

The contractor should have the following skills:

4. Experience naming new organizations.
5. Successful brand management for organizations.
6. Creative portfolio of visual identity packages for organizations.
7. Verified methods of working with organization leaders to illicit focused feedback, consensus and decision-making.
8. Experience working with organizations of varying size and the ability to strategically communicate with organization leaders and stakeholders for maximum participation.
9. Understand target audiences and stakeholders that need to be engaged for EV sales in California.
10. Proven demonstration of strong organizational skills, reliability and follow-through.
11. Administrative strengths in meeting coordination, documentation and time management.
12. Strong ability to work with a team.
13. Track record of delivering tasks with a top-tier quality, on time and within the agreed budget.

5. SUBMITTAL PROCESS, BUDGET AND TIMELINE

The PEV Collaborative has budgeted up to \$30,000 for this RFP. Services billed should not exceed the amount allocated the project. This includes all hard and soft budget expenses, including travel. The contractor will be paid in three (3) phases based on completion of the tasks described in the Scope of Work, minus a 10 percent holdback that will be paid upon completion of the final deliverables.

We are working on an expedited timeline and anticipate the entire project to span no more than eight (8) weeks. However, we expect the time required of the contractor should be somewhat flexible during this time period, reflecting the status of work required. The contractor will ensure that work is completed in a timely manner and does not get pushed to the end of the project. To this end, we will develop and monitor mutually agreed upon deadlines.

TIMELINE

- This RFP is dated July 26, 2016
- **Proposals are due no later than 5:00 p.m. (PDT) August 9, 2016**, to gpaauwe@pevcollaborative.org
- Questions should be submitted in writing to gpaauwe@pevcollaborative.org
Responses will be posted on the PEV Collaborative website at www.PEVCollaborative.org no later than close of business three (3) workdays after questions are received. No questions will be accepted after 5 p.m. (PDT) on August 3, 2016.
- The PEV Collaborative, at its option, may interview bidders. The interviews will be for the purpose of clarifying the proposals. Interviews may involve a presentation or a question-and-answer format or any combination of these.

PROPOSAL REQUIREMENTS

The completed proposal must contain the following information:

- Proposals must be no more than six (6) single-sided pages in length
- Cover letter
- Statement of work outlining how contractor will fulfill each task, including any subcontractors and staff
- Team members and roles
- Primary contractor and subcontractor qualifications and experiences
- Proposed initial schedule
- Cost proposal
- Proposals should include hourly rates and an estimate of how many hours the contractor or other personnel will spend to complete this project between August 12 and October 14, 2016
- References

PROPOSAL REVIEW PROCESS

A review committee will evaluate proposals for each project based on the following criteria and weighting:

100 total points possible:

- 20 Understanding the problem
- 20 Approach to completing each task
- 20 Contractor qualifications
- 20 Previous experience
- 20 Cost

6. CONTACTS

- The primary contact is Gennet Paauwe, Communications Advisor – gpaauwe@pevcollaborative.org



- The secondary contact is Josh Boone, Deputy Executive Director – jboone@pevcollaborative.org