

Peninsula Clean Energy

2025 Marketing RFP: Partner(s) for Brand Identity, Marketing Campaigns, Media Relations & Events

Q&A

1. Can you confirm whether Peninsula Clean Energy would be open to splitting the RFP — allowing one firm to focus specifically on branding and website development, while another leads on campaign execution, paid media, and events?

Yes, PCE is open to engaging one or more agencies to cover the scope of work designated in the Task Areas outlined in the RFP. The agency or agencies' expertise will determine how the different Task Areas are divided.

2. Are paid media buys and production of print materials included in the project budget, or will those be managed separately under a different allocation?

Paid media and production costs will be managed separately from the budget for agency services. The selected agency will be responsible for planning, placing, and managing media buys (Task Area 3) under a separate or supplemental allocation to be determined with Peninsula Clean Energy.

Proposers should include their recommended approach to media strategy and an estimated annual media spend—along with rationale and suggested channel mix—that would effectively support their proposed campaigns.

3. Is there an estimated or range budget for the full scope or for individual task areas (particularly branding, campaigns, and community events)?

While we're not publishing a total or range budget, proposers can assume a level of investment appropriate for a robust, year-round regional marketing and communications program. The intent is to identify partners who can help us scale efforts efficiently across branding, campaigns, and community engagement. We welcome proposals that show different budget scenarios or approaches by Task Area.

4. Will there be a single point of contact or project manager overseeing coordination across the selected firms?

Clear communication and efficient coordination are key to successful partnerships. As a public agency, Peninsula Clean Energy must balance inclusion and collaboration across departments and stakeholders while ensuring the agency's work remains efficient and aligned.

While our internal project structure is still being finalized, the selected agency will work primarily through one single point of contact who will coordinate day-to-day communication and manage feedback internally. This approach will help keep agency communication focused and streamlined while allowing for additional staff or leadership involvement at key milestones to ensure organizational alignment.

Gwen Rose (Director of Marketing), Kerstin Grune (Associate Director of Marketing), and Kirsten Andrews-Schwind (Associate Director of Community Relations and Climate Equity) will serve as project approvers for their respective areas—media relations/thought leadership, brand and marketing campaigns, and community events and engagement.

5. Do you have a target timeline or milestone date for the brand rollout ahead of the 10-year anniversary in 2026?

We are flexible on the timeline, aiming to work with our partner(s) to determine the best path forward to adequately increase brand awareness and fully celebrate the organization's 10-year anniversary. However, given the rebranding needs and timing required for planning, we are tentatively anticipating a Q2 launch for the campaigns, aiming to launch in time to support Earth Day activities in April.

6. How does PCE currently measure brand awareness and engagement, and are there existing benchmarks or KPIs for this next phase?

Peninsula Clean Energy conducts an annual brand survey to measure aided and unaided awareness, perception, and trust. The most recent benchmark is 14% awareness (unaided) and 41% total awareness (unaided + aided), with a goal to reach 60% total awareness within 5 years.

Engagement is evaluated through digital analytics, earned and paid media reach, and participation in community programs and events. It is also measured through program participation—for example, the number of rebate applications submitted or calendar appointments scheduled for personalized electrification support. These KPIs will continue to evolve in partnership with our selected agency(s). Peninsula Clean Energy is currently developing updated annual and five-year goals, with more detail expected by Q1 2026.

7. For community engagement, will there be an expectation for in-person presence or on-site support within San Mateo County or Los Banos?

Yes. Some community engagement activities will require in-person or on-site support in San Mateo County and/or Los Banos, particularly for larger or flagship events. The level of presence

will vary by event type, size, and goals. Smaller or informational events may be supported remotely or through coordination with Peninsula Clean Energy staff and CBO partners.

8. What PR metrics is your team most interested in tracking?

Our communications goals focus on quality and impact rather than volume. Rather than focusing on the number of mentions, we would like to measure how effectively we are building understanding and affecting outcomes with the intended audience—such as policymakers, industry partners, or customers.

Key metrics could include message accuracy, share of voice in key issue areas (e.g., electrification), as well as tone, sentiment, and reach.

9. Can we learn more about the brand strategy before we build the proposal?

The presentation to our Board of Directors on August 22, 2024 summarizes the brand platform. Those slides can be accessed (starting at Slide 64) here:

<https://pcelib.com/wp-content/uploads/2024/08/08-22-2024-BOD-Slides.pdf>

OVERVIEW

10. Does PCE have a plan in place or a vision that they can share on how the multiple agencies will partner with each other? Will there be a single point of contact on the PCE side managing all the various partners, creating a master timeline, keeping the work in sync, etc?

Clear communication and efficient coordination are key to successful partnerships. As a public agency, Peninsula Clean Energy must balance inclusion and collaboration across departments and stakeholders while ensuring the agency's work remains efficient and aligned.

While our internal project structure is still being finalized, the selected agency will work primarily through one single point of contact lead who will coordinate day-to-day communication and manage feedback internally. This approach will help keep agency communication focused and streamlined while allowing for additional staff or leadership involvement at key milestones to ensure organizational alignment with organizational priorities.

Gwen Rose (Director of Marketing), Kerstin Grune (Associate Director of Marketing), and Kirsten Andrews-Schwind (Associate Director of Community Relations and Climate Equity) will serve as project approvers for their respective areas—media relations/thought leadership, brand and marketing campaigns, and community events and engagement.

11. Is there a do not exceed budget in mind for individual tasks (projects). Specifically the website and brand work?

No, there is not a predetermined “do not exceed” budget for individual tasks or projects. However, Peninsula Clean Energy will conduct a comparative analysis of similar projects to establish reasonable NTE budgets as scopes are developed.

12. Should the new brand and anniversary campaigns go live together in Q2 2026, or will web updates happen earlier to support pre-launch communications?

The new brand identity, name, and 10-year anniversary campaigns are expected to launch in Q2 2026. However, supporting updates—such as preliminary web or digital assets—may go live earlier to support pre-launch communications and stakeholder engagement. Following the launch, Peninsula Clean Energy anticipates transitioning into a steady-state brand awareness campaign to sustain momentum and reinforce the new identity.

WEBSITE

13. Will the selected agency have access to end users for interviews, deep hangouts and/or surveys?

We do not anticipate extensive original research, as PCE has an active Voice of Customer (VoC) program with surveys and focus groups to meet customer research needs. However, there are opportunities to collaborate with our VoC program to test messaging or campaign concepts or to design focused qualitative activities, if a specific need is identified. More immersive sessions could be considered on a case-by-case basis, depending on goals, participant availability, and privacy requirements.

14. How will you measure objectives, such as Awareness and Trust? Are you leveraging your Voice of the Consumer data or will you be doing workshops or focus groups? Do you have more tactical KPI's that you are trying to achieve (e.g., site performance, traffic, customer experience, load time, accessibility scores, engagement metrics, conversion, visual alignment with the new brand)?

PCE measures awareness and trust through our annual brand survey, which includes aided and unaided awareness metrics and a favorability measure as a proxy for trust. We also leverage insights from customer satisfaction surveys and focus groups that help track sentiment and understanding about our services and offerings.

In addition, we track tactical KPIs such as website performance, traffic, and conversions. Customer experience, accessibility, and program participation are key priorities, and our focus is on actionable indicators—metrics that tie directly to objectives and inform decision-making, helping us adjust creative, channels, or customer experience in real time. Examples include website conversion rates, program applications, engagement depth, and awareness lift among priority audiences.

By contrast, metrics like total impressions or social likes, while directional, don't always reflect behavior change or understanding. We welcome our selected agency's expertise to help refine and evolve these KPIs so they meaningfully capture impact, not just visibility.

15. Can you elaborate on any specific pain points you are experiencing with the current website (e.g., navigation structure, CMS capabilities, accessibility, user flows, mobile responsiveness, site search, etc.)?

Earlier this year, we conducted a site-wide QC across multiple pages, and all issues were corrected. However, we are always looking to improve the website in terms of navigation structure, CMS capabilities, accessibility, user flows, mobile responsiveness, and site search. We are seeking a partner who can help us identify opportunities for improvement and execute those changes effectively and efficiently.

16. We see you are using a third party Accessibility tool, Userway. Is using this a requirement, or would the expectation of leveraging WCAG 2.2 AA standards for design and development be the preference?

Userway was installed to improve the site's overall accessibility. That said, we intend to work with our selected partner to determine whether we'd like to continue using Userway or implement the WCAG 2.2 standards directly within the website.

17. Will the selected agency have access to any analytics data for evaluation (e.g., GA4, GTM, Hotjar, AccessiBe, VoC, etc.)?

Yes, the selected agency will have access to analytics data.

18. Do you currently use campaign landing pages or pages that are hidden from the main navigation/sitemap?

Yes, we do use some campaign landing pages. For example, we are currently running an emergency heat pump water heater replacement campaign, which directs users to a [landing page](#). We recently used a [landing page](#) to promote the end of the federal EV tax rebates, and we are in the process of updating it to be more evergreen.

19. Are there industry data privacy or retention policies that affect data storage and tracking (e.g., anonymization, cookie consent tools, COPPA, etc.)?

No, there are currently no consent tools in place that would affect data storage or tracking.

20. Are there any security/compliance constraints (e.g., SOC 2, government accessibility standards, etc.)?

We will gather more information and provide it to the selected agency.

21. In addition to the redesign of the site in the new brand's look and feel, do you anticipate needing support in content entry and creation (i.e., entering content into the CMS, image sourcing, video sourcing or creation, etc.)?

Yes, given the scale of the brand awareness and 10-year anniversary campaigns, plus the lift required to update the brand identity on the website, we are anticipating needing support with webpage design, content entry, and creation.

22. Are there any complex interactive needs or tools you intend to incorporate into the new version of the site that you don't have currently?

Peninsula Clean Energy is exploring enhancements such as improved filtering and sorting tools, interactive calculators, and introducing e-commerce capabilities that help customers act on their electricity and electrification needs. We welcome recommendations on features that best support our customer experience goals and organizational priorities.

23. Do you handle translations, outsource for professional translation, or use machine translation?

We use Weglot as a third-party translation tool on the website. For key webpages, such as the homepage and campaign landing pages, we have used third-party translators to review and refine Weglot's translations.

We use a professional translation agency for printed collateral. If you have a translation agency you like to work with, we are open to new recommendations.

24. Do you expect to add more languages? If so, which ones?

At this moment, our priority languages are English, Spanish, traditional Chinese, and Tagalog. While we do not have plans to add additional priority languages in the near-term, our digital platforms can support additional languages through automated translation tools to improve accessibility and reach across our diverse community.

25. Can you confirm our understanding that Task 4 isn't a site rebuild and migration, rather working within your current WordPress site and environment to implement the other initiatives in the RFP?

Correct: Task 4 isn't a site rebuild and migration. Instead, we are looking for a partner to work within our current WordPress site and environment to implement the other initiatives in the RFP.

26. Where is the site hosted (e.g., WP Engine, Pantheon, self-hosted)?

Flywheel.

27. Do we have access to SSH, SFTP, or WP-CLI?

Yes.

28. Do you have staging and backup capabilities?

Yes.

29. What's the current PHP and MySQL version?

PHP version is 8.2.29 and MySQL version is 8.0.37-google.

30. Which WordPress version and Elementor (Pro) versions are in use? Which plugins or add-ons for each?

WordPress core is version 6.8.3, and Elementor is version 3.4.4. We can provide more information to the selected agency about plugins and add-ons.

31. Is there any custom code (child theme, custom plugins, ACF, etc.)?

Yes, there is custom code. We can provide technical documentation to the selected agency.

32. What third-party integrations exist or are planned (Salesforce, HubSpot, Mailchimp, ActiveCampaign, GA4, Looker Studio, Meta Ads)?

This is the list of integrations/tracking scripts currently active on the website: Facebook Pixel, Google Analytics, Google Tag Manager, and Clarity MS.

33. Who maintains ongoing site administration (PCE IT, Marketing, or an external host)?

PCE's marketing team, The Bureau Of Small Projects, and IDLab currently maintain ongoing site administration.

BRAND

34. Will renaming be part of the rebrand process?

The renaming process has already been completed. Agencies are expected to take the new name and create and execute a new brand identity.

35. Does PCE have a final/evolved brand platform or will the brand discovery process require refinements, adjustments, or overhaul?

Peninsula Clean Energy's brand platform includes a brand pyramid, architecture, and messaging platform. The focus of this engagement will be to evolve and express the brand—refining tone of voice, developing a cohesive visual identity system, and translating the brand into campaigns, digital channels, and community experiences.

We don't anticipate a full brand overhaul, but we do expect refinements and creative development that strengthen consistency, accessibility, and connection across audiences.

The presentation to our Board of Directors on August 22, 2024 summarizes the brand platform. Those slides can be accessed (starting at Slide 64) here:

<https://pcelib.com/wp-content/uploads/2024/08/08-22-2024-BOD-Slides.pdf>

36. Does PCE have existing messaging guidelines that need refinement or will they require net-new voice, tone, and messaging guidelines and examples as a result of an updated brand foundation?

Peninsula Clean Energy has an established messaging platform that will serve as a foundation. However, we anticipate that messaging, voice, and tone will need refinement and alignment with the new name and updated brand identity, including refreshed examples that bring the evolved brand to life across audiences and channels.

37. Can PCE provide additional information about existing issues with its logo?

The green and blue version of the logo did not meet WCAG compliance standards for accessibility. We switched to a dark blue and light blue version of the logo in February 2025 with the launch of the new website. There are also some legibility limitations as the current logo is scaled down. Furthermore, it could benefit from some modernization to be a more effective vessel for our brand story moving forward.

38. What are the most notable insights generated from the marketing team's multi-year effort to consolidate relevant customer/consumer research?

As customers are automatically enrolled in our baseline product, we enjoy a very high market share. However, many of our customers do not know that they are our customers. Our research has highlighted gaps between who we are and how customers experience us—including limited awareness that we both supply their electricity and provide rebates and programs that help them electrify their homes and vehicles.

Many customers are confused about how our billing line item appears on their PG&E energy bill. There is a common misconception that PCE is an extra charge. This misconception is particularly a concern among budget-conscious customers who look closely at their monthly bills.

Our marketing efforts have focused on addressing these gaps—increasing brand recognition, clarifying our role, and motivating customers to participate in our services and offerings.

39. Are there particular ways in which your existing brand hasn't worked or resonated with your audiences?

Peninsula Clean Energy is hard to say, spell and remember, which limits memorability and connection. The name "Peninsula Clean Energy" does not resonate as a local community agency in the City of Los Banos, which is not located on a peninsula. These customers are more likely to view our agency with some suspicion.

ADDITIONAL QUESTIONS

40. What is the expected timeline and duration for each project and campaign?

This work will be on an as-needed basis and will be ongoing, starting with a one-year contract, with the possibility of multi-year extension by mutual agreement. Upon contract execution, specific campaign timelines and milestones will be determined with the selected proposer. As part of your response, please provide timeframes your team needs depending on the types of communications or marketing campaigns, as well as the assets and complexity. Providing timelines and the actual hours/costs accrued for your portfolio projects would be helpful in our review, whenever possible.

41. How are you measuring awareness to evaluate whether it increases from 40% to 60%?

Awareness will be measured through third party annual brand awareness surveys.

42. Beyond awareness, are there secondary KPIs you'd like media efforts to drive (e.g., engagement, program participation, electrification adoption)?

For the purposes of this RFP, media efforts will focus on brand awareness. Metrics related to engagement, program participation, or electrification adoption will be defined through campaign-specific, go-to-market plans developed with our selected partner.

43. What paid media channels are you currently using (search, display, paid social, programmatic, streaming audio/video, OOH)? Which channels have historically delivered the strongest ROI or lift, and which have underperformed?

The paid media channels PCE currently uses are search, display, and paid social. Historically, our search ads have performed well, and we are continually refining the content and targeting strategies for paid social. For the brand awareness and 10-year anniversary campaigns, we are interested in using OOH and streaming video, as well. We are also open to other promotional ideas, such as activations.

44. Do you envision paid media being concentrated locally (San Mateo / Los Banos) or expanded regionally or statewide?

Paid media should be concentrated locally in our service territory in San Mateo County and the city of Los Banos.

45. Do you have existing audience lists, CRM segments, or lookalike models that could be leveraged in paid media?

Peninsula Clean Energy maintains customer information that is protected and confidential under state privacy requirements. While individual customer data cannot be shared or used directly without the proper protections in place, there are options to collaborate on targeting. We will work with our selected partner to identify compliant, effective ways to reach priority audiences while maintaining strict data privacy standards.

46. What systems are currently in place for campaign analytics (e.g., GA4, Google Tag Manager, dashboards, CRM/marketing automation)?

We currently use GA4, Google Tag Manager, and Looker Tables for campaign analytics. However, we are seeking partner(s) who can help us implement more robust dashboards for KPI tracking and reporting.

47. Can you provide guidance on the anticipated paid media budget range (separate from agency fees)?

Paid media and production costs will be managed separately from the budget for agency services. The selected agency will be responsible for planning, placing, and managing media buys (Task Area 3) under a separate or supplemental allocation to be determined with Peninsula Clean Energy.

Proposers should include their recommended approach to media strategy and an estimated annual media spend—along with rationale and suggested channel mix—that would effectively support their proposed campaigns.

48. How does PCE measure brand awareness? Is it possible to speak to any of the specific metrics PCE would be looking for the successful candidate to track here?

Peninsula Clean Energy conducts an annual brand survey to measure aided and unaided awareness, perception, and trust. The most recent benchmark is 14% awareness (unaided) and 41% total awareness (unaided + aided), with a goal to reach 60% total awareness within 5 years.

49. How does PCE measure brand perception and/or reputation? Again, is it possible to speak to any of the specific metrics PCE would be looking for the successful candidate to track here?

PCE measures awareness and trust through our annual brand survey, which includes aided and unaided awareness metrics and a favorability measure as a proxy for trust. We also leverage insights from customer satisfaction surveys and focus groups that help track sentiment and understanding about our services and offerings.

When it comes to reputation, we are also considering media coverage, share of voice, and stakeholder sentiment. We welcome the support of the selected agency to refine how we effectively track earned reputation.

50. If the new name is adopted by the board, will trademark clearance and registration filing be complete before the project kickoff?

PCE has already conducted both a preliminary and comprehensive trademark review for the new name. Since the new name has been adopted by the Board, PCE will begin the process of registration filing immediately. However, it seems likely that the process will kick off with the partner agency before the trademark is officially acquired.

51. Is there an expectation or need for a 10th anniversary identity along with the updated masterbrand identity?

Peninsula Clean Energy may explore a 10-year anniversary expression or campaign identity that complements the updated masterbrand. Whether a distinct anniversary identity is developed will depend on the final brand strategy and creative approach, which we intend to shape in collaboration with our selected marketing partner.

52. Will a new tagline need to be translated into other languages? If so, will PCE handle translation or is it expected that the selected agency will handle translation?

A new tagline will need to be translated into all of our priority languages. PCE can handle the translation with our third-party translator or, if it has the capability, the selected agency can handle the translation. A new tagline needs to be developed with an eye to cultural competency for all priority languages.

53. Will you require testing of the new visual identity for cultural resonance? If so, would research be handled by PCE or should that be included in our proposal?

Cultural and community resonance is important to PCE. We may conduct testing in collaboration with our Voice of Customer (VoC) program and existing focus groups, or we may ask our selected partner to propose a research approach that complements those efforts. We welcome

recommendations on how best to ensure the new visual identity is inclusive, accessible, and resonates across our diverse service communities.

54. Do you have a specific budget allocated per Task Area?

No, there is not a predetermined “do not exceed” budget for individual tasks or projects. However, Peninsula Clean Energy will conduct a comparative analysis of similar projects to establish reasonable NTE budgets as scopes are developed.

55. Was the new name approved this week? If so, can you share what it will be? Not essential for our proposal, but knowing the new name would provide the team with a little more insight as we consider strategy and approaches.

Yes, the new name was approved. You can watch the Board of Directors meeting here (~1:56:00): <https://www.youtube.com/watch?v=goEx3eY7kRk>

56. Can you share the strategy behind the new name?

The organization was looking for a name that reflects who we are and what we do beyond providing electricity to end users. It reflects our innovation in service of the community; is fresh and contemporary; is uplifting, turning skepticism into optimism; and is approachable.

57. Can you share the methodology used to define the increase of 40% to 60% awareness increase goal over five years?

Increasing PCE’s brand awareness to 60% has been a goal for the organization since 2020. The target is informed by benchmarks set by other CA utilities and CCAs that have made a focused effort to increase brand awareness and have successfully maintained levels in the approximately 60%-70% range.

58. Will there be any additional KPIs that the awareness campaign and 10-year anniversary campaign will be measured by?

Engagement is evaluated through digital analytics, earned and paid media reach, and participation in community programs and events. It is also measured through program participation—for example, the number of rebate applications submitted or calendar appointments scheduled for personalized electrification support. These KPIs will continue to evolve in partnership with our selected agency(s). Peninsula Clean Energy expects adoption of its 2026 - 2030 Strategic Plan in November 2025, and annual goals and KPIs will be developed by Q1 2026.

59. Can you share the approximate annual media spend that has sustained your current 40% awareness?

For FY 2020-2024, we have had a modest advertising spend in the \$75,000-\$150,000 range. We understand that a brand awareness campaign will require a greater spending level.

60. If a new brand and name is introduced will this awareness goal be revised?

The awareness goal will remain the same. However, we recognize that introducing a new brand and name will require additional effort to rebuild baseline awareness and continue progress toward our 60% awareness target by 2030.

61. You mention that you have a new brand strategy, which will inform this new work. Can you share that new brand strategy with us?

The presentation to our Board of Directors on August 22, 2024 summarizes the brand strategy. You can access those slides (starting at Slide 64) here:

<https://pcelib.com/wp-content/uploads/2024/08/08-22-2024-BOD-Slides.pdf>

62. You mentioned the desire to ‘meet people where they are in their electrification journey’... What are the main audience-types of electricity customers and what are the various entry-points into this journey?

Peninsula Clean Energy uses customer research and segmentation to understand varying levels of interest, readiness, and experience with clean energy technologies. “Entry points” often occur when customers are making energy-related decisions—like replacing appliances, buying an EV, going solar, or seeking cost savings. We offer rebates, incentives, low-interest loans, and personalized support to help customers take the next step in their electrification journey.

63. What is another company (in-sector and out-of-sector) that you think does a good job of telling their story or showing a compelling visual identity?

While this is very subjective, overall we’re drawn to brands that simplify complexity, feel trustworthy, and connect emotionally without overstating. Some examples of companies that accomplish this approach in a compelling way are Patagonia, GE, and Rewiring America.

64. In your desire to possess a brand identity that is flexible enough to work across various applications... What are the primary and secondary applications you expect to see? How about some less likely, but plausible applications?

We expect to apply the brand identity in a variety of ways, such as on the website and in digital advertising, out-of-home advertising, merchandise, etc. The aspect ratio of the logo needs to work in a variety of applications from digital assets to out-of-home advertising and community event exhibitory.

65. In your view, what are the defining characteristics that set you apart from your competitors in the clean energy space?

As with other CCAs, Peninsula Clean Energy is large enough to scale real programs yet small enough to stay responsive to the communities we serve. We're a community-led, not-for-profit public agency, which means we make decisions for people, not shareholders. Our combination of scale, mission, and local governance allows us to move quickly, fill gaps that large utilities often overlook, and design programs that directly address local needs and priorities. We also have the flexibility to partner with program implementers, solar providers, financial institutions, and other innovators to reach customers in new ways and pilot what works best for different segments of our community.

66. For the website's multi-lingual capabilities, is it your preference to have mirrored (duplicated) CMS's with manual translation? Or leveraging a 3rd party plugin which can automatically translate to any language in addition to the 4 target languages? (We can unpack pros and cons if desired.)

PCE currently uses Weglot as a third-party plugin for website language translation. For key webpages, such as the homepage and campaign landing pages, we have used third-party translators to review and refine Weglot's translations.

67. Is it your expectation that the specific media spot buys (not media planning), print-production costs (Anniversary events, etc.) will pull from additional budget outside this scope? How about website production (development)?

Peninsula Clean Energy expects that paid media placements and print-production expenses will be funded through separate project budgets. The selected agency may help plan or manage media and print efforts, but the direct costs for those activities will not come from this contract's core budget.

However, website development and implementation are anticipated to be included within the scope and budget proposed.

68. What do you feel is the biggest public-perception challenge to overcome with customers converting to electrification?

It depends on the appliance and where a customer is at in the electrification journey. In general, the biggest challenges are perceptions that electrification is expensive and difficult and that the technology is inferior to gas (for example, for cooking or quickly heating water). Our marketing, outreach, and rebate and program support are intended to help customers overcome challenges at different stages of the journey.

69. 10-year anniversary campaign... it was mentioned that the Board may approve a new name? Is this a new name for PCE? just the campaign? Is a naming exercise part of the identity work to be completed by agency partner?

The new name is for the entire organization, replacing “Peninsula Clean Energy.” Agencies will be expected to take the new name and create and execute a new brand identity.

70. Of the functionality present on the website, are there any major technical integrations you'd like to add or improve upon? (Including things like: API integrations, filtering/sorting, data manipulation, calculators, e-commerce, event registration, general ‘advanced functionality’ beyond simple, static content.)

Peninsula Clean Energy is exploring enhancements, such as improved filtering and sorting tools, interactive calculators, and introducing e-commerce capabilities that help customers act on their electricity and electrification needs. We welcome recommendations on features that best support our customer experience goals and organizational priorities.

71. What level of client involvement should we expect during this engagement? Will there be multiple teams, committees, or levels of approvals which should be accounted for?

Currently, Gwen Rose manages the PR consultant, Kerstin Grune manages the marketing agency, and Kirsten Andrews-Schwind manages the CBO partnerships. We anticipate that a similar structure will continue with the selected agency or agencies. However, we are always willing to make adjustments in order to improve workflows and leverage our partners’ expertise.

Agencies should expect that there will be a high level of client involvement during this engagement. Depending on the task, approvals may be conducted by the Marketing team only or in conjunction with senior staff, C-Suite, and/or Board approval.

AGENCY STRUCTURE, ROLES & COLLABORATION

72. What is driving the decision to issue this RFP at this time?

The purpose of the RFP is to ensure fairness, value for money, and to develop a scope that is responsive to our needs.

73. Are there existing partner agencies already working on any of the tasks outlined in the RFP? Are you seeking a lead agency to subcontract/manage these roles, or planning to assign tasks to multiple agencies individually?

There are existing partner agencies who have also been invited to participate in this RFP process. PCE is planning to assign tasks to multiple agencies individually with one or more staff members managing the working relationships.

Clear communication and efficient coordination are key to successful partnerships. As a public agency, Peninsula Clean Energy must balance inclusion and collaboration across departments and stakeholders while ensuring the agency’s work remains efficient and aligned.

While our internal project structure is still being finalized, the selected agency will work primarily through one single point of contact who will coordinate day-to-day communication and manage feedback internally. This approach will help keep agency communication focused and streamlined while allowing for additional staff or leadership involvement at key milestones to ensure organizational alignment.

Gwen Rose (Director of Marketing), Kerstin Grune (Associate Director of Marketing), and Kirsten Andrews-Schwind (Associate Director of Community Relations and Climate Equity) will serve as project approvers for their respective areas—media relations/thought leadership, brand and marketing campaigns, and community events and engagement.

74. How does integrated agency team collaboration currently work, and would you prefer it to continue as-is or would you like to see changes/improvements?

Currently, Gwen Rose manages the PR consultant, Kerstin Grune manages the marketing agency, and Kirsten Andrews-Schwind manages the CBO partnerships. We anticipate that a similar structure will continue with the selected agency or agencies. However, we are always willing to make adjustments in order to improve workflows and leverage our partners' expertise.

75. What is the detailed transition plan from the incumbent agencies? Will there be an overlap period, and what kind of knowledge transfer support will be provided?

The transition plan will depend on which agency(s) are selected as our partners moving forward. We aim to have an overlap period with a knowledge transfer, should the incumbent agencies and selected agencies agree to it.

PROPOSAL & SELECTION PROCESS

76. How many agencies will advance to each phase of the process (Phase II, Phase III)?

The number of agencies that advance to the next phase of the process will be determined by the agencies' expertise and responses to the various Task Areas. However, we expect to hold approximately seven interviews with internal stakeholders and the shortlisted agencies.

77. Will there be an opportunity for feedback or debrief for proposers after the process concludes?

Proposers have the opportunity to seek feedback after the selection process concludes. PCE will not proactively provide feedback.

BUDGET & COMPENSATION

78. We understand the RFP requests budget allocation by tactic. Would you also like us to provide a summary allocation by the six defined task areas (e.g., brand, campaigns,

media, web, events, media relations), or should we focus exclusively on tactics in our breakdown?

Yes, please include a summary of costs by the six task areas, along with any additional detail by tactic that helps explain your approach. This will help us compare proposals consistently across all areas of work.

79. If the realistic total budget exceeds \$500,000, may we propose an alternative scenario, or only respond to the sample budget of \$500,000?

Please respond to the sample budget of \$500,000 so that we are able to easily compare agencies' different approaches. However, agencies are also welcome to propose an alternative scenario that exceeds \$500,000, if applicable.

80. To confirm our understanding – the \$500,000 sample budget is only supposed to include agency fees, not out of pocket costs like media buys, event out-of-pocket costs, etc. – correct?

Correct. Paid media and production costs will be managed separately from the budget for agency services. The selected agency will be responsible for planning, placing, and managing media buys (Task Area 3) under a separate or supplemental allocation to be determined with Peninsula Clean Energy.

Proposers should include their recommended approach to media strategy and an estimated annual media spend—along with rationale and suggested channel mix—that would effectively support their proposed campaigns.

81. Is there an all-in yearly marketing budget range or ballpark for the tasks listed in the RFP?

While we're not publishing a total or range budget, proposers can assume a level of investment appropriate for a robust, year-round regional marketing and communications program. The intent is to identify partners who can help us scale efforts efficiently across branding, campaigns, and community engagement. We welcome proposals that show different budget scenarios or approaches by Task Area.

TIMELINE & MILESTONES

82. Are there fixed dates or key milestones—especially for the 10-year anniversary—we must plan around?

April is typically Peninsula Clean Energy's busiest month for community outreach and events as part of Earth Month. Ideally, a complete branded presence for community events would be

designed, produced, and ready to deploy by the end of March 2026 to support these activities. Specific timing and milestones will be finalized in collaboration with the selected agency.

83. For campaign and deliverable timelines, do you prefer high-level milestones or detailed week-by-week breakdowns?

As for the proposal in response to the RFP, a top-level description of high-level milestones and timelines is sufficient. We also welcome more detailed breakdowns of timelines and milestones, such as week-by-week glances, to help demonstrate your team's approach to campaign planning.

TRANSLATION/MULTILINGUAL & CULTURAL ADAPTATION

84. Can you clarify the process for coordinating translation and cultural adaptation for campaigns and materials? For example: Does the agency work directly with your translation vendor, or is this managed by PCE?

PCE uses a third-party agency for translation services, and we anticipate that PCE will continue to manage this relationship. If the agency has in-house or preferred translation and cultural adaptation capacity, that can also be an option.

85. Are there specific quality assurance or review processes for translated content that agencies should be aware of?

PCE provides our third-party translator with English copy to be translated into Spanish, traditional Chinese, and Tagalog. We may also provide copy in our priority languages to be reviewed and refined by the translator. Our bilingual staff and CBO partners spot check translations for accuracy and cultural competency.

SUPPLIER DIVERSITY & CORPORATE STRUCTURE

86. If our agency is a subsidiary of a holding company, are we eligible to certify or self-certify as a diverse supplier under CPUC GO 156, or does eligibility apply to the parent company only?

Eligibility is determined by the CPUC Supplier Clearinghouse based on ownership and control at the subsidiary level. If the parent company maintains majority control or oversight of daily operations, the subsidiary typically would not qualify independently for certification.

87. If our parent company holds the relevant certification, how should this be disclosed or documented in our submission?

The name of the parent company holding the certification should be sufficient.

88. Are there minimum diversity spend goals vendors must meet during contract delivery?

There are no mandated diversity spend thresholds.

RESEARCH, INSIGHTS & PAST DATA

89. Will agencies have access to past research, audience insights, or campaign performance data to inform proposal strategy? Or would we only be able to access that data once under contract?

The presentation to our Board of Directors on August 22, 2024 summarizes the brand platform. Those slides can be accessed (starting at Slide 64) here:

<https://pcelib.com/wp-content/uploads/2024/08/08-22-2024-BOD-Slides.pdf>

Additional past research, audience insights, and campaign performance data will be provided to the selected agency(s) once under contract.

STAKEHOLDER & CBO ENGAGEMENT

90. How are community-based organizations (CBOs) currently engaged, and what level of agency involvement is expected in managing these partnerships?

We typically engage between 15-20 CBOs each year. These relationships are managed and funded by Peninsula Clean Energy staff. We may introduce agencies to select CBOs to collaborate on specific events or projects when aligned.

91. Can we propose new models for CBO partnership or co-creation, or should we focus on existing structures?

As PCE has formal, funded relationships with most of our CBO partners, we request that you work with us in that structure first. PCE runs a long-running annual grant program to fund collaboration with our CBO partners. The RFP period for that grant just closed in October, and awards are generally announced in December. Grants are given for the calendar year. Specific work plans and budgets are negotiated ahead of the grant period. That said, additional CBO partnerships or models are possible to create when not covered by our existing structures or relationships.

KPIs & REPORTING

92. Beyond raising brand awareness to above 60%, are there other critical KPIs or metrics for agency performance? Do you have quantitative KPIs, or existing benchmarks for these stated goals?

Peninsula Clean Energy expects adoption of its 2026 - 2030 Strategic Plan in November 2025, which includes 5-year goals. Department goals and KPIs will be developed and evolved annually. Strategically, Marketing & Community Relations focuses on:

- Driving deep community engagement, especially among multilingual and multicultural audiences (priority languages: English, Spanish, traditional Chinese, Tagalog).
- Increasing participation rates and engagement in electrification and rebate programs.
- Delivering measurable uplift in earned media and thought leadership at local and state levels.

We invite our selected agency(s) to be a thought partner in determining the necessary benchmarks and KPIs to measure success. Past campaign data and other metrics will be provided to the selected agency(s) once under contract.

93. Do you have preferred tools or formats for campaign measurement and reporting?

We invite our selected agency(s) to be a thought partner in helping us develop and maintain effective campaign measurement and reporting tools, such as dashboards.

94. How is PCE team's success measured every year? Are there certain metrics you are held accountable to from your board or other stakeholders?

PCE closed out its 2020 - 2025 Strategic Plan (see Board Memo [here](#)). Our next phase of growth and evolution will be guided by the 2026 - 2030 Strategic Plan, which we expect to adopt in November 2025. This Plan has 5-year agency goals, which flow down to department goals and KPIs that will be developed / evolved annually.

SCOPE CLARIFICATIONS

95. For website updates, is the scope limited to branding/content changes, or do you anticipate UX, technical, or accessibility improvements as well?

We expect that the majority of website changes in the nearterm will be related to branding and content updates. However, we are looking for partner(s) that will help us improve the overall functionality of the website into the future, allowing us to adequately support campaigns, optimize performance, improve UX, and make it more accessible.

PROPOSAL LOGISTICS & REFERENCES

96. If we are partnering with another agency on this response, should references be from the lead agency only, or may partner agencies also be included?

References may be from the lead agency and/or partner agencies.

COLLABORATION & PROJECT MANAGEMENT

97. What is the preferred cadence and format for agency check-ins, reporting, and project management?

We will work with our partner(s) to determine the appropriate cadence and format for check-ins, reporting, and project management. However, we anticipate meeting at least weekly, possibly more frequently leading up to the campaign launch. Reporting should be conducted at least monthly in order to ensure that we optimize our marketing efforts and spend.

CREATIVE TESTING & MESSAGE VALIDATION

98. Do you have a preferred approach to creative testing or message validation before campaign launch?

No, we do not have a preferred approach to creative testing or message validation. We invite agencies to leverage their expertise and recommend an approach that will best meet our needs.

ADDITIONAL QUESTIONS

99. We are looking for clarity on budget parameters. The RFP references 500k annual budget as an example for how you want to see total number allocated across Task Areas. On the Webinar it sounded like this went from example to the actual budget range to use for agency service fees. Is 500k the correct annual budget to use?

The \$500,000 figure was provided only as an example to illustrate how budgets might be allocated across Task Areas. Proposers should present scalable budgets and fee structures that reflect a reasonable level of activity for an annual integrated marketing program.

100. If we believe the scope of work requires more budget than 500k/year, how would you like us to present that? For example, we can provide a menu or pricing and prioritize scope so it fits within the budget and so you can see what might require additional budget.

Yes, please provide us with a menu or pricing or other information to effectively demonstrate how a budget beyond \$500k/year would be effectively utilized and optimized.

101. Do you have a media spend budget in mind that you can share with us? Knowing you have several campaigns - 10 yr anniversary, brand campaign, and all the program campaigns, should we expect one number to manage all the above or different media budgets for each campaign?

While we're not publishing a total or range budget, proposers can assume a level of investment appropriate for a robust, year-round regional marketing and communications program. The intent is to identify partners who can help us scale efforts efficiently across branding,

campaigns, and community engagement. We welcome proposals that show different budget scenarios or approaches by Task Area.

We will work with our selected partner agency(s) to manage budgets based on their corresponding Task Areas. We will also likely designate different media budgets for each campaign.

102. Do you have a desired portion of how much of both the services and media budgets you want to allocate to the different go to market needs? For example, 10% of media and services budget to the 10-year anniversary campaign, 50% of both budgets to programs, etc. Or is this discretionary based on our recommendations?

We welcome proposers to provide their recommendations for allocating budgets to the different go-to-market needs.

EVENT TIMING & CADENCE

103. Does PCE have a preferred window or target months for the 10-year anniversary events? Please list the desired months & year.

PCE participates in over 100 events/year in typical years, with the bulk of the outdoor events taking place between April and October when the weather is good. Therefore we request that a branded physical presence for events be ready to deploy in time for April events.

104. Should we assume the unique events would take place within the same quarter or spaced across the year? (office warming reception, policy symposium)

Dates have not yet been determined; however, it is likely that events would be spaced across the year. The office warming would happen in approximately October 2026.

105. Will both San Mateo County & Los Baños each have an office warming reception & symposium? If so, is the expectation that they would be on the same day or on different days?

These events are planned for San Mateo County only. We anticipate that we will have a presence in Los Banos at existing, well-attended community events, such as the annual Easter Egg Hunt (April), Spring Fair (May), or Back to School supply giveaway (August).

AUDIENCE & HEADCOUNT

106. Can PCE share anticipated audience size ranges for the unique anniversary events (e.g., office warming reception & symposium)?

Target audience size will be determined for each event based on the capacity of the venue.

107. For participation in CBOs, is there a specific setup PCE would like to establish, or change compared to now?

For details on how we work with CBOs, see our annual CBO outreach grant RFP at <https://www.peninsulacleanenergy.com/solicitations/2026-community-outreach-grant-program/>.

108. How should the agency be prepared to support PCE's participation in CBO events?

PCE may introduce the agency and specific CBOs to collaborate on planning specific events or projects. The exact roles of each group will be determined based on the project and strengths each partner brings to the collaboration. Support may include creative development (such as branded collateral, tabling displays, or interactive materials) and, in some cases, on-site staffing or event coverage. Roles and responsibilities will be determined jointly for each activity.

VENUE SCOPE

109. Does PCE have internal venues in mind or will venues need to be scoped for the office reception + policy symposium?

The office reception will take place at the new PCE office. The policy symposium location needs to be scoped; although, we have some ideas for locations.

110. If internal venues, will PCE own hiring and/or mgmt of A/V Team that can handle microphones, panels, display screens, & confidence monitors or will the agency be responsible for owing this?

That depends on the location and the size of the event. PCE does not have a dedicated in-house A/V team. While our staff can handle A/V for smaller events, for a policy symposium in a large auditorium (for example), it would make sense to include an A/V team in your quote.

LEVEL OF INVOLVEMENT

111. For events with PCE staff lead execution, what level of creative oversight or on-site presence would be expected from the agency? (signage, coordination of vendors)

That would be determined based on the event, venue, and relative strengths of the agency and PCE staff.

BUDGET PARAMETERS

112. Is there an established range or ceiling for event-related costs (venue, catering, production, etc.) per event to guide feasibility & concepting?

There is no range or ceiling for event-related costs. We expect events to be cost effective in meeting their goals while delivering on a memorable, well-curated experience.

113. Is it PCE's expectation for the agency to own and manage vendors, billing, & invoicing (e.g. catering, design, A/V, photography, etc.) or will PCE own and manage this?

We are open to either approach. In your proposal, please be clear which costs are or are not included in your budget.

ADDITIONAL QUESTIONS

114. Your RFP outlines support needs across six task areas. Is each task area managed by a separate PCE staff person? Are there multiple PCE staffers involved with either particular tasks or the project as a whole? Any sense of the size of the PCE team that the project will interface with?

Clear communication and efficient coordination are key to successful partnerships. As a public agency, Peninsula Clean Energy must balance inclusion and collaboration across departments and stakeholders while ensuring the agency's work remains efficient and aligned.

While our internal project structure is still being finalized, the selected agency will work primarily through one single point of contact who will coordinate day-to-day communication and manage feedback internally. This approach will help keep agency communication focused and streamlined while allowing for additional staff or leadership involvement at key milestones to ensure organizational alignment.

Gwen Rose (Director of Marketing), Kerstin Grune (Associate Director of Marketing), and Kirsten Andrews-Schwind (Associate Director of Community Relations and Climate Equity) will serve as project approvers for their respective areas—media relations/thought leadership, brand and marketing campaigns, and community events and engagement.

115. If we propose across all tasks but are deemed most competitive for a particular task, will not being awarded tasks in other areas jeopardize our submission for the task where we are viewed to be strongest?

Proposers will be evaluated based on their strengths in each task area, and Peninsula Clean Energy may award work to one or more firms depending on the best fit. Being considered for only one task area will not disadvantage your submission.

116. Do you have a rough budget allocation set for this work? Can you provide a sense of past budgets for supporting these activities?

No, there is not a rough budget allocation for individual tasks or projects. However, Peninsula Clean Energy will conduct a comparative analysis of similar projects to establish reasonable NTE budgets as scopes are developed.