



**Request for Proposals (RFP)
for
Ongoing Digital Marketing Services
and Other Design Services**

Issue Date:	March 3, 2021
Proposal Due Date:	March 24, 2021

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About AESP

Organizational Background

The Association of Energy Services Professionals (AESP), established in 1989, is a 501(c)(3) non-profit industry association. AESP is a dynamic community of energy professionals dedicated to advancing the industry through professional development, networking, and supporting a resilient, sustainable energy future. We serve over 2,200 members and focus on improving the delivery and implementation of energy efficiency, demand-side management, distributed energy resources and demand response programs. AESP provides access to a network of energy practitioners and promotes the transfer of knowledge and experience. Members leverage a wide variety of professional development and educational opportunities through conferences, webinars, training courses and other programs (e.g., Mentoring and Women in Energy).

Member Demographics

AESP members represent all aspects of the sustainable energy community from the 'demand' side of the meter. AESP is not involved with the transmission or distribution of energy.

Our members include:

- Investor-owned, municipal and cooperatives utilities
- Consultants (primarily support utilities and the energy industry with designing, implementing, marketing, and evaluating utility customer programs related to energy efficiency and clean energy)
- Manufacturers and suppliers of energy efficiency, demand response, electric transportation and related distributed energy products and services (ex. lighting, HVAC, software solutions, smart thermostats, electric vehicle charging equipment, energy storage, etc.)
- Federal and state government officials (including U.S. DOE and the US EPA)
- Public benefits agencies and community choice aggregation organizations
- Other non-profit organizations

AESP has approximately 2,200 members and is primarily comprised of Utilities (Investor-Owned Utility [IOU], Municipality [Muni], or a Rural Electric Cooperative [Coop]), Consultants who serve the utility and energy efficiency/distributed energy industries and Manufacturers/Suppliers of energy efficiency and distributed energy products/services round out the majority of member profiles. 38% of our members are from utilities, 35% from consultants, 15% from manufacturers/suppliers and the balance of 12% from government, non-profits, public benefit agencies and students. However, AESP places a heavy emphasis on attracting, sustaining and growing utility-based memberships.

Key Messages

- AESP is a welcoming community for people from all walks of energy.
- AESP is focused on providing the best possible member/attendee/engagement experience.
- AESP is the place to participate and engage with others to advance professionally.
- AESP is growing and expanding into adjacent areas of energy such as Electric Vehicles (EVs), Storage, Distributed Energy Resources (DERs).
- AESP is focusing on attracting more diverse members from these expanded disciplines.

Organizational Goals

- Establish itself as the Preeminent Clean Energy Education Leader.
- Thoughtfully Expand Content Beyond Energy Efficiency.
- Embrace and implement a culture of Diverse, Equity and Inclusion (DEI) values.
- Expand Membership Depth and Breadth Beyond the Core of Energy Efficiency.
- Retain AESP's Existing Membership Base of Energy Efficiency and Utility Professionals
- Demonstrate Member Value

Current Programs and Services

AESP offers a wide range of programs, services, and benefits to its members:

- Conferences and Webinars provide tangible, actionable knowledge to help members perform their jobs more effectively and help them meet their professional development goals
- Training Courses and E-Learning opportunities through a full Portfolio of Synchronous, Asynchronous and In-person Instructor-led courses are available to all members
- Networking and engagement opportunities with 11 regional Chapters (U.S. and Canada), and 7 Topic Committees. The Topic Committees revolve around AESP's core disciplines and range from Utility Customer Program Implementation and Evaluation to Marketing and Pricing. Topic Committees are comprised of volunteer members and other industry leaders who regularly share thoughts, expertise and opportunities, addressing some of the industry's most pressing issues today. Chapters offer a way to interact on a local basis, attend events nearby and develop a local network.
- Specialty Programs including Women in Energy, Experience to Exchange (E2E) Mentoring Program, Emeritus Program and a Scholarship Program.
- Resources, tools and information to advance "best practices" including weekly and quarterly publications, an ongoing blog partnership with media firm, Energy Central, a new monthly podcast, as well as a Resource Library, a new Member Marketplace program and a Supplier Directory.

Marketing Goals

Overview

AESP markets to two distinct groups in our energy community (utilities and non-utilities) and each group has very different needs. Utilities seek out education, training, conferences and networking while non-utilities want to connect with utilities and are interested in booths at conferences, networking and training is a distant third.

Overall Marketing Goals:

- Develop a more refined marketing plan that takes into account the two very different sets of needs within our utility and non-utility market segments. The plan will have separate objectives, strategies and tactics but overall, we want to better target our efforts and measure results more effectively.
- Increase our visibility as the “Go To” association for training and education in energy efficiency and distributed energy resources (DER) by improving our outreach, update our visuals, and position AESP as a thought leader in our space.
- Drastically improve our social media presence and platform strategy to maximize its potential.

Marketing Mix

In a typical marketing mix - product, price, placement and promotion come into play. With AESP as a member-centric organization, our marketing mix has a deeper emphasis on people (members), process (benefits and delivery of those benefits) and price (providing a value-based membership is more important than competitor pricing comparisons).

Marketing Targets

Utilities

Currently AESP has approximately 80% of the IOUs in the U.S. as Group Members with a much smaller number of Municipalities and Cooperatives in the membership. Our target is to approach, attract and retain key IOUs that are missing such as Pacific Gas & Electric, Madison Gas & Electric, Duke Energy and Florida Power & Light, while also growing our membership of smaller Municipal Utilities and Cooperatives.

Non-utilities

As AESP expands into adjacent markets, the scope for potential members broadens into other areas including EVs, DERS, storage and more. This presents opportunities for more synergistic relationships with utilities looking beyond a traditional relationship with a utility program design firm or program implementer, etc. The companies in these new spaces are also targets for AESP.

Requested Scope of Work

Initial Services

This Request for Proposal (RFP) is designed to solicit responses for the purposes of providing digital marketing services and support to promote and grow AESP, increase member engagement, and augment its image and visibility in the energy efficiency community. AESP understands that a solid, well-executed digital marketing plan, an effective website and compelling branding is critical to its short- and long-term success. Currently, AESP has limited staff and resources to devote to developing and implementing a full-scale digital media plan, a revamped website, and re-branding and is seeking a qualified, experienced partner to assist with these efforts.

With the rapidly changing energy efficiency industry, these initiatives become even more imperative in order to keep pace with evolving member needs; expand into adjacent energy efficiency markets; and raise AESP’s image and visibility. A three-year Strategic Plan was recently formalized and outlines objectives to update and upgrade AESP’s image, and significantly augment our reach and influence. AESP is seeking a qualified, experienced digital marketing firm to assist AESP in four major areas. The selected firm will work directly with AESP’s CEO and Director of Marketing on developing, executing and evaluating the four items outlined directly below.

Digital Marketing Plan

Develop and assist AESP with the implementation of a comprehensive digital marketing plan that includes a strengthened social media presence including recommending appropriate channels, messaging, timing, and data analytics as well as recommendations for Search Engine Optimization including go-to-market optimization as well as monthly optimization.

Currently, AESP does not have a robust social media presence and tends to be more reactive than proactive. To enhance our image and visibility, AESP needs a comprehensive, sustainable social media plan.

Current SOCIAL MEDIA stats are below:

Twitter

Followers 2475

	Tweet Impressions	Profile Visits	Mentions	New Followers
Nov	5926	83	9	1
Dec	4079	300	3	0
Jan	8667	1768	43	0
Feb	2806	227	7	3

LinkedIn Group

Members 5037

Note: “Group” analytics not supported by LinkedIn

LinkedIn Page (new)

Followers 486

Unique visitors (past 30 days) 93

New followers (past 30 days) 32

Impressions from post (past 30 days) 696

Facebook

Followers 1136

Likes (past 30 days) 915

Page reach (past 30 days) 229

Current GOOGLE ANALYTICS – Website stats - Q4 2020

Title	Pageviews	Unique Pageviews	Avg. Time on page - seconds	Entrances	Bounce Rate %
Association of Energy Services Professionals	31492	13254	30.67	7419	4.6%
AESP Community Calendar - Association of Energy Services Professionals	6954	2743	17.76	888	6.53
Current RFPs - Association of Energy Services Professionals	3763	1785	22.06	1475	1.02
Directory Search Results: 1 Records Matched Your Search Criteria: Association of Energy Services Professionals	1432	175	37.48	45	8.89
About Us - Association of Energy Services Professionals	1166	492	42.26	96	6.25
AESP online courses	879	378	27.44	213	.47
Site Search - Association of Energy Services Professionals	707	285	17.50	14	14.29

Website Redesign

Redesign AESP’s current website layout and page templates (hosted by Your Membership association management software) for a fresher more updated look that is more modern, inviting, and relevant. The redesign of the website must be designed to be mobile responsive.

Logo Redesign

Refresh the current AESP company logo with a more modernized, iconic look.

Branding Update

Assist AESP staff with rebranding of its overall communications look and feel for a more cohesive and connected design for weekly, monthly and quarterly publications and communication vehicles. AESP would also be interested in updates on the color pallete, typography, and revised branding guidelines.

Ongoing Support Services

AESP requests hourly rates or bundled services rates for the ongoing services listed below. These services may be offered either as an on-demand option or included as a regular ongoing monthly service.

Separate from the work stated in the Request for Proposal above, the following line items should be priced separately utilizing an hourly rate with recommendations on the number of hours estimated on a monthly and/or annual rate or a packaged pricing option. One annual price for each line item would also be considered.

- Social Media Campaign Support with Optimization
- Cross Media Marketing
- Content Marketing
- Graphic Design Services
- Event Campaigns
- Copywriting
- Copyediting
- Data Analytics – website usage, conversion rates, social media analytics, etc.

Proposal Requirements

Qualifications of the Firm

Contractor must demonstrate high levels of expertise in the following areas:

- Ability to plan, implement and measure effective Social Media portfolios.
- Ability to re-design a website and make recommendations for navigation, content, frequency of content change, etc.
- Extensive knowledge of, and experience working with, not-for-profit organizations, associations or foundations.
- Work collaboratively with a multi-disciplinary team including AESP team, partner organizations and others to complete the initiatives.
- Proven track record of developing strategic social media platforms, website re-design, and re-branding as well reaching or exceeding stated goals.
- Demonstrate ability to meet tight deadlines and produce deliverables according to timeline.
- Measure the success of marketing efforts both quantitatively and qualitatively and produce reports that evaluate output and impact.
- Provide three to five client references with company, contact name, title, address, telephone and e-mail address. These references must include a scope of work that preferably includes a digital marketing plan with social media, a website re-design and a re-branding.

Experience of Proposed Team

The proposed team must:

- Demonstrate expertise in the four requested areas outlined in Requested Scope of Work and submit portfolio examples as well as case studies.
- Develop and recommend a solution set for each item outlined in the Requested Scope of Work.
- Create a Scope of Work Summary.
- Propose a reasonable Timeline to complete the RFP requirements.

Price Proposal

All proposals to be sent via e-mail to jszaro@aesp.org. Any additional information, collateral, marketing data, etc. can be sent via Dropbox or FTP alternate.

Vendors should provide bids for each of the following tasks plus hourly or packaged pricing for ongoing services as outlined above in Requested Scope of Work.

Initial Services

- Digital Marketing Plan
- Website Redesign
- Logo Redesign
- Branding Update

Ongoing Services

- Social Media Campaign Support with Optimization
- Cross Media Marketing
- Content Marketing
- Graphic Design Services
- Event Campaigns
- Copywriting
- Copyediting
- Data Analytics – website usage, conversion rates, social media analytics, etc.

Vendor Questions

Vendors may send any clarifying questions to jszaro@aesp.org prior to March 12, 2021. AESP will respond to these questions electronically no later than March 16th.

Deliverables and Timeline

Issue RFP	March 3, 2021
Submit Questions	March 12, 2021
Responses to Questions	March 16, 2021
Proposal Due Date:	March 24, 2021
Vendor Interviews:	March 31 – April 9, 2021
Final decision and Contract Negotiations	April 12 –16, 2021
Contractor begins work:	April 21, 2021

Evaluation Factors for Award

Applicants are cautioned that this is a best value procurement and that best value concepts apply to this solicitation. In making its best value determination, AESP may award a contract resulting from this solicitation to the responsible applicant whose offer conforming to the solicitation will be the most advantageous to AESP, price and other factors considered. AESP shall give due consideration, as appropriate, to the overall merits of the proposal (including the relative advantages and disadvantages to AESP), the experience of the Contractor, the cost of the proposal, and AESP’s needs. Applicants are cautioned that AESP may award the contract solely on the initial proposals. Accordingly, applicants should put forth their best efforts in their initial submission. However, AESP reserves the right to conduct discussions if later determined by AESP to be

necessary. AESP may reject any or all offers if such action is in the best interest of AESP; accept other than the lowest offer; and waive informalities and minor irregularities in offers received.

AESP will evaluate proposals received from all offerors and the following factors will be used in selecting a contractor:

Background, Experience, Staffing and Organization 30%

- Qualifications and demonstrated experience
- Client examples of similar work
- References
- Capabilities of assigned staff

Approach 30%

- Understanding of the needs of AESP
- Description of services to be performed, this includes details of tasks and responsibilities
- Timeline for initial individual tasks and availability of ongoing support to AESP

Cost Proposal 40%

- Cost will be evaluated for reasonableness based on the products and services described
- AESP will evaluate costs for initial projects separately from ongoing service rates
- Alternative proposals and special package rates will be considered as long as the requested services have been fully addressed by the vendor in its response.

Terms of Contract

Reserved rights

All rights of each Party under this Agreement are specifically reserved, and any payment, act or omission shall not impair or prejudice any remedy or belonging right to each Party under it. Any right or remedy in this Agreement shall not preclude the exercise of any other right or remedy under this Agreement or under any law, nor shall any action taken in the exercise of any right or remedy be deemed a waiver of any other rights or remedies.

Upon award, Contractor shall not have rights to or permission to use the work prepared by Contractor without the prior written permission of AESP.

Contractor Warranty

Upon award, Contractor represents and warrants that the work Contractor creates or prepares for AESP, will be original, will not infringe upon the rights of any third party, and will not have been previously assigned or licensed.

Non-disclosure agreement

Once the contract is awarded, an executed Non-disclosure agreement will be required.

Termination

Either party may terminate this Agreement in whole or in part at any time by thirty (30) days written notice to the other. In the event of such termination, CONTRACTOR shall be compensated in accordance with this

Agreement for the services rendered and expenses incurred or committed to prior to the effective date of notice of termination.

Contractor Reimbursement and Compensation Policy

AESP will not reimburse or compensate Contractor for any time, fees and costs incurred while developing their proposals. Additionally, if Contractor is asked to present their proposal in person, AESP will not reimburse or compensate Contractor for any fees related to the presentation, including but not limited to staff time, travel and out-of-pocket costs. AESP will not compensate Contractor for time or fees incurred while negotiating a contract agreement.

Reporting Expectations

Once the contract has been awarded a weekly reporting structure will be implemented to discuss creative, track progress and ensure goals are being met. Weekly meetings will be held with the CEO, Director of Marketing and other staff as needed.