



REQUEST FOR PROPOSAL

For Marketing and Communications Project Management in support of California's Hybrid and Zero-Emission Truck and Bus Voucher Incentive Project (HVIP) - Sustainable Fleets

HVIP: www.californiahvip.org

CALSTART: www.CALSTART.org

RELEASE DATE: September 2, 2022

IMPORTANT DATES:

Proposals Due: Friday, September 16, 2022, at 5:00 p.m. PST.

Please submit proposals by email to Shane Glaseman at sglaseman@calstart.org

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REQUEST FOR PROPOSAL

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| Title: | Marketing and Communications Project Management in support of California's Hybrid and Zero-Emission Truck and Bus Voucher Incentive Project (HVIP) Sustainable Fleets |
| Issuing Agency: | CALSTART RFP Due Date: Friday, September 16, 2022, at 5:00 p.m. PST. |
| Period of Performance: | This contract will commence on October 1, 2022 and run through September 30, 2023. |
| Instructions: | Proposals subject to the conditions of this request should be sent to: Shane Glaseman, Communications Manager, at sglaseman@calstart.org . Only bids submitted via electronic means will be accepted. Indicate firm name and "Marketing and Communications Project Management in support of California's Hybrid and Zero-Emission Truck and Bus Voucher Incentive Project (HVIP) Sustainable Fleets" in the email subject line. This is a one-step process. Technical and cost proposals shall be submitted in the same package. It is the Contractor(s)'s responsibility to ensure that all materials have been reviewed and are complete. |
| Budget: | The maximum amount payable under this agreement is \$100,000.00 flat fee including pre-approved, out-of-pocket expenses. Not-to-exceed actual cost. |

I. Introduction

The purpose of this contract is to execute a marketing plan that attracts and acquires fleets into a certification program that designates a standardized commitment to zero-emission vehicle procurement. The program is a part of the Hybrid and Zero-Emission Truck and Bus Voucher Incentive Project (HVIP), wherein CALSTART connects fleets and owner/operators with point-of-sale discounts for new vehicles, incentivizing rapid deployment of advanced technologies. CALSTART has managed HVIP on behalf of the California Air Resources Board since 2009.

II. Background

CALSTART is a national membership organization focused on delivering transformational change in the transportation marketplace. As the transportation sector is responsible for nearly 30% of carbon emissions, ushering in clean transportation technologies – with an emphasis on zero-emission trucks – has never been more important to meet critical state climate and health goals. Reaching greater adoption of zero-emission trucks is a key goal of the organization and our state funding agencies. Through the Hybrid and Zero-Emission Truck and Bus Voucher Incentive Project (HVIP), CALSTART connects fleets and owner/operators with point-of-sale discounts for new vehicles, incentivizing rapid deployment of advanced technologies. CALSTART has managed HVIP on behalf of the California Air Resources Board since 2009.

Reducing greenhouse gas emissions is essential to achieving crucial climate goals, and to reducing the harmful particulate matter that has caused a health crisis in many neighborhoods, including census-designated disadvantaged communities and families living close to heavy truck corridors and ports.

CALSTART has a variety of outreach and marketing activities that support the educational and engagement efforts of HVIP and increase awareness and participation by small and medium fleets. This includes workshops, ride & drive events, research and reports, event outreach (booths) at industry events and conferences, and social media engagement and marketing efforts. Additionally, CALSTART provides planning tools and technical assistance to increase knowledge of the available technologies and funding opportunities, as well as to influence purchase decisions.

[Sustainable Fleets](#) is an accreditation program managed by CALSTART. The program sets objective, meaningful standards and guidelines for fleets, similar to green building certifications. Participants achieve standardized ratings that can be used across industries, with stakeholders, and in marketing to demonstrate their commitment and achievement while pursuing their path to a zero-emission fleet.

III. Scope of Work

A. Location and Target

California markets are prioritized and include the Ports of Long Beach and Los Angeles as well as freight corridors in the Inland Empire; the San Joaquin Valley, including the Port of Stockton and pollution-overburdened communities such as Modesto; and the San Francisco Bay Area and corridors tied to the Port of Oakland, with secondary overflow to national markets.

The contracted marketing project manager will execute a marketing plan to increase awareness and engagement among fleets who are interested in obtaining or are currently using zero-emissions vehicles in their commercial fleets, with the result being a certification that communicates the level of zero-emission vehicle adoption in their fleets.

B. Deliverables

The Contractor will be responsible for deliverables below.

- Project management of marketing and communications deliverables in support of the Sustainable Fleets team, including attending meetings; scheduling and managing agendas; tracking and trafficking approvals of tasks and deliverables.
- Maintain message platform for Sustainable Fleets program and content including message map, external FAQ, internal Q&A, and fast facts/data points.
- Edit and maintain website content and copy, working with CALSTART or CALSTART-contracted web developer on relevant websites.
- Execute and adjust, as necessary, the Sustainable Fleets marketing and communications plan to include launch and marketing activities through FY'23.
- Develop and maintain Sustainable Fleets factsheets, case studies, and other agreed-upon launch content.

IV. How to Apply

Please submit a brief proposal containing the following information, at a minimum, to the contact email provided below:

A. Organizational support and experience

- Demonstrate previous and/or current experience working with zero-emissions trucking-related related marketing efforts;
 - Provide evidence of insight into trucking/fleet industry or similar industry, with particular focus on California-based fleets
 - Include biographical information describing professional experience of key personnel;
 - Describe the key points of differentiation and strengths your service provides that set you apart from your competition
 - Include, as appropriate, proof of disadvantaged business or minority or women-owned businesses certification
- B. References.
- Please provide references (a minimum of three), including a contact name and phone number for each.
- C. Portfolio.
- Include a small portfolio of work samples and brief narratives that demonstrate three successful campaigns comparable to the one we intend to implement. This must include a minimum of one project of similar size and nature to the scope of work proposed in this RFP.
- D. Client roster. Include a list of current and past clients with relevance to this project.
- E. Only bids submitted via electronic means will be accepted. Applications are to be submitted by email to Shane Glaseman at sglaseman@calstart.org by 5:00 p.m. PST, Thursday, August 25, 2022.

Questions concerning the specifications in this Request for Proposals (RFP) should be directed via email to Shane Glaseman at sglaseman@calstart.org.

CALSTART reserves the right, at its sole discretion, to answer or not answer any question regarding this RFP.

V. Evaluation Criteria

CALSTART will assess proposals received based on the following factors:

1. Relevant and proven experience.
 - The relevance of education, experience, knowledge, and skills of the respondent and the individual(s) who will be available to provide these services
 - The expertise of the applicant in working with similar clients and/or on similar projects
2. References
3. Recognition of and demonstrated facility with the concepts presented in this RFP
4. The competitiveness of cost of services