

**2007 GRANT PROPOSAL SOLICITATION  
Alternative Fuel Incentive Program (AFIP)**

## **ATTACHMENT F**

# **Consumer Education and Outreach**

Mobile Source Control Division  
California Air Resources Board  
02/09/07

California Air Resources Board  
**Alternative Fuel Incentive Program (AFIP)**  
**Plug-in Hybrid and Alternative Fuel Vehicles:**  
**Vehicle Demonstration and Research**

February 9, 2007

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## **INTRODUCTION**

The mission of the California Air Resources Board (ARB or Board) is to promote and protect public health, welfare and ecological resources through the effective and efficient reduction of air pollutants while recognizing and considering the effects on the economy of the State. Chapter 48, Statutes of 2006 (Assembly Bill 1811) authorized the California Air Resources Board (ARB) to expend \$25 million (twenty-five million dollars) in the 2006/2007 budget year to incentivize the use and production of alternative fuels. The Board is requesting Alternative Fuel Incentive Program (AFIP) grant proposals from applicants for the fiscal year 2006/2007. All funds must be encumbered by June 30, 2007.

The focus of this grant application packet is to solicit outreach and education proposals in two categories to educate Californians about advanced technologies and alternative fuel vehicles and fuels to increase the purchase and use of these vehicles by more Californians. Proposals are requested from qualified teams or individuals including marketing firms, universities, government and non-governmental organizations, air districts, educational facilities, and other organizations interested in working toward increased use of clean vehicles in California.

## **BACKGROUND**

In order to determine the best approach to reaching California consumers, the ARB conducted focus groups around the State in late 2006. The research was conducted to determine consumer understanding and attitudes towards advanced technology and alternative fuel vehicles, such as hydrogen fuel cell vehicles, electric vehicles, hybrids, plug-in hybrids, ethanol/E85 vehicles, biodiesel, compressed natural gas and partial zero emission vehicles (PZEVs). Results of the research brought to light several themes among consumers:

1. Today, the main characteristics consumers weigh in their vehicle purchase decision include fuel economy, purchase price, maintenance and reliability, safety, performance and personal or family needs.
2. Californians are generally unfamiliar with most advanced technologies and alternative fuel vehicles, or have misperceptions about the vehicles and their capabilities, believing them to be small and lacking in power and style.
3. Consumers agree that advanced technologies are better for the environment, but tend to be skeptical that vehicle emissions are a substantial problem.
4. While consumers are generally favorable in concept toward cleaner vehicles, few of them believe their own vehicle choice makes a difference.
5. Very few Californians factor into their car purchase decision the impact of a vehicle on the environment.

6. Most Californians consider clean vehicles to be an option for their family ONLY if these vehicles are proven to be equal to or better than traditional gasoline vehicles in all aspects.
7. Consumers have little trust in new, “untested” technologies, but they tend to trust those they consider to be their peers with personal experience for vehicle validation.

## **ELIGIBILITY**

Two types of projects will be awarded funding. All applicants must meet the minimum qualifications stated in this section.

### **1. Marketing Campaigns**

*Minimum Qualifications:* Professional communications firms that are registered to do business in the State of California may apply. Marketing firms must possess significant active experience in outreach and communications such as developing and implementing a cohesive campaign to educate, inform and promote a product, service or behavior, and oversight of web site development. The Project Manager proposed must have at least ten years experience in marketing/communications and have experience managing successful mass marketing campaigns geared toward the broad California public.

### **2. New or Existing Educational Programs**

*Minimum Qualifications:* Universities, governmental agencies, non-governmental and certified non-profit organizations, air districts, educational facilities, and other organizations certified in California, having existing communications efforts in place that support the goals of the ARB are eligible. Applicants are invited to apply for augmented funding for existing programs, or for funding that will support a new educational/outreach effort. Applicants are encouraged to provide matching funds. Matching funds are not required, but will be weighted in the scoring of proposals.

## **ELIGIBLE PROJECTS/SCOPE OF WORK**

The ARB’s motor vehicle emission standards require manufacturers to sell cleaner vehicles in California. Making advanced technology and alternative fuel vehicles available, however, is only part of the equation in getting cleaner cars on the road. It will take mass public acceptance and utilization of these clean technologies to make significant impacts on air quality, energy security and reductions in global warming emissions. In order to achieve these results, the ARB is seeking to: 1) contract with one qualified marketing firm to develop and implement a consumer education campaign and tackle barriers to public acceptance of advanced technology vehicles, and 2) provide funding for new or existing educational programs that work toward ARB’s goals.

## 1. MARKETING CAMPAIGN

*Funding: \$700 thousand over two years. Granted to one marketing firm.*

### A. Explanation of Needs

Marketing firms are invited to submit proposals outlining how their firm would approach the campaign ARB is requesting within the budget stated. The ultimate goal of this campaign is to increase the number of advanced technology and alternative fuel vehicles on the road. The marketing firm selected will be responsible for creating and promoting compelling messages in a way that will appeal to the broad demographic of California car buyers. Information that should be conveyed to the public include:

- a. Information about the wide range of advanced technology and alternative fuel vehicles – their availability, and how they compare and compete with traditional vehicles.
- b. The link between personal vehicle choice and air quality, climate change and dependence on foreign oil.

### B. Critical Activities

As part of the overall marketing plan to be developed, the ARB has established a list of activities that staff believes are important. These activities will need to be included in the overall cost estimate as they will require recommendations and assistance from the contractor:

- a. *Design and Promote the Clean Air Label.* Assembly Bill 1229 requires the ARB to redesign the Smog Index label to include information about both smog forming and global warming emissions. This label will be affixed to the window of every vehicle sold in California by 2009. This is an opportunity to create a consumer friendly label that is visible at the site of purchase and gives car buyers tools to “choose” a cleaner vehicle. Please note that ARB staff may be modifying an existing label so actual design may be minimal.
- b. *Expand and Promote [www.DriveClean.ca.gov](http://www.DriveClean.ca.gov).* ARB’s consumer-based web site for car buyers will be a main component of the campaign, and will need to be adjusted to include the following (additional suggestions are welcome):
  - Automate the way auto manufacturers update the site with new and upcoming vehicles.
  - Include text and video testimonials.
  - Include a rating system.
  - Include educational area for children and auto dealers.
  - Include a database and organizational structure to include every vehicle sold in California.
  - Include information about the new clean air label.

- c. *Design DMV Inserts.* The State has the opportunity to include promotional inserts in DMV vehicle registration mailouts for no cost. The ARB believes this would be an inexpensive way to reach the broad California demographic.
- d. *Set up a System for Technology Demonstrations.* Focus group research showed that getting more people in the driver's seat of advanced technology vehicles will go a long way in generating acceptance. The ARB would like to coordinate with local Air Quality Districts and auto dealerships in California to determine the most cost and resource-effective ways to get more Californians personally exposed to advanced technology vehicles available on the market.
- e. *Update existing CalEPA display.* Update the display in the CalEPA building (that resides in the lobby, but is also a mobile display) to provide more current and compelling information to consumers about the environment. Estimated production costs are \$1.5 thousand.
- f. *Explore participation in Los Angeles Auto Show.* Explore the possibility of having a presence at the LA Auto Show, either in the lobby or elsewhere, where an interactive clean car exhibit can be seen by the mass public.

### **C. Additional Suggestions**

The ARB will look to the expertise and recommendations of the marketing firm chosen to determine the most effective methods for communicating to the mass public. As *possible activities* that might be considered, however, the following are suggested:

- a. Billboards – in regions that are trend leaders
- b. Partnerships with car buyer web sites (Cars.com, Edmunds.com, etc.) to include environmental considerations as part of the comparison criteria for vehicles
- c. Print advertisements in women and family magazines, car enthusiast publications, etc.
- d. Partnering with sporting events and race tracks to demonstrate the capabilities of advanced technology vehicles (e.g., power, size, performance) where skeptics might be more likely to be exposed to them

For background information on clean vehicle programs ARB currently has in place that relate to this solicitation, refer to the following ARB websites:

- CA Hydrogen Highway Network: <http://www.HydrogenHighway.ca.gov>
- Zero Emission Vehicle (ZEV) Program: <http://www.arb.ca.gov/zev>
- Consumer web site for clean vehicles: <http://www.DriveClean.ca.gov>

## **2. EDUCATIONAL PROGRAMS**

*Funding: \$500 thousand – over a maximum of two years. Divided among all*

*selected programs.*

#### **A. Explanation of Needs**

The ARB would like to contribute funding to programs within California that work toward increasing public acceptance and knowledge of advanced technology and alternative fuel vehicles. To support such programs, the ARB is soliciting proposals from universities, government and non-governmental organizations, air districts, educational facilities, and other qualifying organizations that need augmented funding for existing communications programs, or start-up funding for new educational programs being planned.

The ARB is most interested in supporting programs that have matching funds available, however, these funds are not required.

#### **AVAILABLE FUNDING**

The total funding available through this solicitation for advanced technology and alternative fuel vehicle marketing and education is \$1.2 million. It is anticipated that this allocated amount will be distributed as grants within this category. However, should an insufficient number of quality proposals be received, monies may be shifted to other grant categories. Not all monies may be awarded. In no event will the total grant amount exceed \$25 million.

Funding is estimated to be broken down as follows:

\$700 thousand	Marketing firm grant to develop a new public education campaign.
\$500 thousand	Distributed among selected entities to augment proposed new, or existing educational campaigns.

#### **APPLICATION REQUIREMENTS**

All projects shall meet the specific requirements of this solicitation. Applicants must meet these criteria and fully complete the project application to be considered for project funding. Additional information may be requested during the application review process if needed.

#### **APPLICATION PROCESS**

This application packet is to be completed by applicants and contains the forms and guidelines for submitting complete proposals for funding. The decisions regarding eligible applicants and proposals that are ultimately funded will be the sole discretion of

the Air Resources Board. Grant applications must be complete and meet all of the requirements set forth in this application packet.

Two signed original copies and one CD of the proposals, including all the required documents must be received at the Air Resources Board headquarters at 1001 I Street, Sacramento, CA 95812 **no later than 5:00 PM, March 12, 2007.**

Mail or deliver proposals to the following address:

U.S. Postal Service Deliveries

Hand Deliveries

(UPS, Express Mail, Federal Express)

Ms. Kathy Leuterio

Ms. Kathy Leuterio

Air Resources Board  
Mobile Source Control Division  
P.O. Box 2815  
Sacramento, CA 95812

Air Resources Board  
Mobile Source Control Division  
1001 I Street  
Sacramento, CA 95814

**Postmark dates will not suffice to meet the stated deadlines.**

**No application documents may be submitted by fax or email.**

*Timelines*

Public Release of Solicitation	February 9, 2007
Application Deadline	March 12, 2007 5:00 PM
Review/Rating of Proposals	
Grantees Selected	April 12, 2007
Public Posting Notice	
Award Notification	
Deadline for Encumbrance of Funds	June 30, 2007

*Format Requirements*

The ARB strongly encourages applicants submitting proposals to be accurate, brief and clear in the presentation of their proposal/ideas.

**EVALUATION AND SCORING**

The ARB will evaluate each qualifying project based on the merits of the grant proposal. The maximum score is 100 points. Qualifying projects within each category will be considered for funding.

A multi-agency state team will review, evaluate, and make recommendations on the provided grant proposals. The multi-agency state team is comprised of the Air Resources Board (ARB), California Energy Commission (CEC), California Department of Food and Agriculture (CDFA), Department of Forestry and Fire Protection (CDF), Integrated Waste Management Board (IWMB) and Water Resources Control Board (WRCB).

**1. SCORING FOR MARKETING CAMPAIGNS**

Marketing proposals will be scored as follows:

**A. Project Cost (maximum of 30 points)**

In the application provided, applicants will clearly state costs for each item included in their proposed campaign plan. Costs will include all estimated labor, material and product fees associated with each item in the proposed plan. For items with many variables, applicants will provide cost ranges for various likely scenarios. Total funds allocated for a marketing campaign is estimated at \$700 thousand. Scoring will be weighted as follows:

<b>Proposal Characteristics</b>	<b>Points Earned</b>
Costs are unclear, not inclusive of all potential fees, and/or the total costs seem too high for the level and quality of work to be performed.	<b>0 – 7 points</b>
Costs are represented clearly and are inclusive of all potential fees, but seem too high for the level and quality of work to be performed.	<b>8 – 15 points</b>
Costs are represented clearly, are inclusive of all potential fees, and are appropriate for the level and quality of work to be performed.	<b>16 – 30 points</b>

**B. Communications Plan (maximum of 40 points)**

Proposals will be evaluated based upon the ability of the firm’s proposed communications plan to adhere to the Scope of Work and meet ARB’s goals. Scoring will be weighted as follows:

<b>Proposal Characteristics</b>	<b>Points Earned</b>
Communications plan is unclear and/or incomplete, lacks creatively, and/or does not provide the highest impact for the funding provided.	<b>0 – 10 points</b>
Communications plan is complete, provides high impact recommendations, and considers the budget.	<b>11 – 25 points</b>
Communications plan is well organized, tailors recommendations creatively and appropriately to ARB's needs and goals, and recommends high-impact activities that maximize the budget.	<b>26 – 40 points</b>

**C. Applicable Experience (maximum of 30 points)**

Proposals will be evaluated based upon the experience applicable to the Scope of Work. Scoring will be weighted as follows:

<b>Proposal Characteristics</b>	<b>Points Earned</b>
Applicant meets the minimum qualifications, but lacks in experience applicable to the Scope of Work.	<b>0 – 7 points</b>
Applicant demonstrates qualifications to carry out the Scope of Work.	<b>8 – 15 points</b>
Applicant demonstrates extensive and/or strong experience directly applicable to the type of campaign requested in this solicitation.	<b>16 – 30 points</b>

**2. SCORING FOR EDUCATIONAL PROGRAMS**

Proposals requesting funding for existing or proposed new education programs will be scored as follows:

**A. Project Costs (maximum of 30 points)**

Applicants will clearly state the amount of funding they are requesting and the basis for this request. Total funds allocated for educational programs are estimated at \$500 thousand.

<b>Proposal Characteristics</b>	<b>Points Earned</b>
Costs are unclear, not inclusive of all potential fees, and/or the total costs seem too high for the level and quality of work to be performed.	<b>0 – 3 points</b>
Costs are represented clearly, but seem too high for the level and quality of work to be performed.	<b>4 – 10 points</b>

Costs are represented clearly, are inclusive of all potential fees, and are appropriate for the level and quality of work to be performed.	<b>11 – 20 points</b>
<b>*Bonus Credit:</b> Organization will be contributing other funding to the program.	<b>1 – 10 points</b>

**B. Project Plan (maximum of 40 points)**

Proposals will be evaluated based upon the level that their proposed outreach/education plan contributes to ARB’s goals. Scoring will be weighted as follows:

<b>Proposal Characteristics</b>	<b>Points Earned</b>
Outreach/education plan is unclear and/or incomplete, lacks creatively, and/or does not provide the highest impact for the funding provided.	<b>0 – 10 points</b>
Outreach/education plan is complete, provides creative and high impact recommendations, and considers the budget.	<b>11 – 25 points</b>
Outreach/education plan is well organized, creative, maximizes the budget with high-impact activities, and strongly supports ARB’s goals.	<b>26 – 40 points</b>

**C. Ability to Carry Out Campaign (maximum of 30 points)**

Proposals will be evaluated based upon the ability of the organization to successfully carryout the proposed outreach/education campaign. Scoring will be weighted as follows:

<b>Proposal Characteristics</b>	<b>Points Earned</b>
Applicant meets the minimum qualifications, but lacks demonstrated ability to carry out the proposed outreach effort.	<b>0 – 10 points</b>
Applicant demonstrates qualifications to carry out proposed outreach activities.	<b>11 – 20 points</b>
Applicant demonstrates strong experience and ability to carry out the outreach activities proposed.	<b>21 – 30 points</b>

## **MONITORING AND REPORTING REQUIREMENTS**

Awardees must submit quarterly reports to ARB that contain the following information:

1. Overview of activities that took place in the previous quarter.
2. Summary of the impact of activities to date, including any data that has been provided as feedback from campaign efforts.
3. Summary of funds spent to date.
4. Notice of any expected increase in costs, and justifications for those increases.
5. Activities planned in the next quarter.

The ARB reserves the right to inspect all funded projects with a minimum of 48-hour notice for the life of the project contract.

## **DISBURSEMENT OF FUNDS**

Total funds for the Education and Outreach portion of this solicitation are \$1.2 million and must be paid out by March 31, 2009.

\$700 thousand will be allocated to a marketing firm over the period of two years. Marketing funds will be paid to the marketing firm over time as tasks are deemed completed by the ARB.

Up to \$500 thousand will be allocated to selected organizations with existing or planned outreach/education programs. Funds will be paid over an agreed upon time period not greater than two years as tasks are deemed completed by the ARB.

## **CONTACT PERSONS**

Please contact Kathy Leuterio or Katrina Sideco for information relating to this grant. Questions and correspondence should be directed to:

Kathy Leuterio  
Air Resources Board  
Mobile Source Control Division  
P.O. Box 2815  
Sacramento, CA 95812  
Phone: (916) 322-1731  
[STTB@arb.ca.gov](mailto:STTB@arb.ca.gov)

Katrina Sideco  
Air Resources Board  
Stationary Source Division  
P.O. Box 2815  
Sacramento, CA 95812  
Phone: (916) 323-1082  
[STTB @arb.ca.gov](mailto:STTB@arb.ca.gov)

## **REQUIRED ELEMENTS**

### **1. Marketing Firm Proposals**

Marketing firms must include the following items in their response to this solicitation:

#### **A. Completed application form**

Applicants must complete the application forms found in this section. The information submitted should include applicant information, estimated timeline for deliverables, estimated costs, and information on all staff, subcontractors and partners proposed to work on the campaign.

#### **B. Communications campaign proposal**

Marketing firms must provide specific recommendations of activities that the firm would (with the information available within this solicitation) consider as part of the communications plan, and a short description of why the activity would be recommended. These recommendations should be developed in two parts:

- a. Activities recommended within the budget of \$700 thousand (Overall costs should include the list of activities the ARB has requested to be a part of the campaign), and
- b. Additional activities that could be carried out if a larger budget were available.

#### **C. Qualifications and References**

Proposals should include summaries of prior similar campaigns the firm has developed that demonstrate the firm's experience and ability to carry out a communications campaign tailored to the general public. References should be provided for each of the campaigns listed.

### **2. Education Proposals**

Proposals for funding to support existing or new outreach programs should include the following items in their response to this solicitation:

- A.** A completed application form. The form will require applicant information and a summary of costs.
- B.** A detailed description and background of the program being proposed.
- C.** A description of the program's goals, and the need it is fulfilling.
- D.** A summary of the audiences the program is (or would be) geared toward, and the number of people exposed on an annual basis.
- E.** An analysis of the program's effectiveness to date, or a description of the potential effectiveness of the proposed program.
- F.** A statement of the amount of funding requested through this solicitation and what the funding would specifically be used for.

- G.** A statement of how much funding the organization plans to contribute (partial or match funding), if any.
- H.** A summary of experience and qualifications doing similar work.

**APPENDIX A**  
**Application Form**

## MARKETING PROPOSALS APPLICATION FORM

Please print clearly or type all information on this application. Completed application forms should be attached to each proposal.

### A. Applicant Information

1. Company Name/Organization Name/Individual Name:		
2. Business Type:		
3. Contact Name and Title:		
4. Person with Contract Signing Authority (if different from above):		
5. Business Mailing Address and Contact Information:		
Street:		
City:	State:	Zip Code:
Phone: (    )		Fax: (    )
E-mail:		

I hereby certify that all information provided in this application and any attachments are true and correct.

Printed Name of Responsible Party:	Title:
Signature of Responsible Party:	Date:

### Third Party Certification (if applicable).

I have completed the application, in whole or in part, on behalf of the applicant.

Printed Name of Third Party:	Title:
Signature of Third Party:	Date:
Amount Being Paid for Application Completion in Whole or Part:	Source of Funding to Third Party:







## E. STAFF INFORMATION

Include information for each staff member who is expected to work on the campaign. Attach resumes.

Name:	Hourly rate:
Phone:	E-mail:
Title:	
Expected duties for this campaign:	
Name:	Hourly rate:
Phone:	E-mail:
Title:	
Expected duties for this campaign:	
Name:	Hourly rate:
Phone:	E-mail:
Title:	
Expected duties for this campaign:	

*If more room is needed, this form may be copied or recreated.*

**F. SUBCONTRACTOR AND PARTNER INFORMATION**

Proponents may partner with other entities. Responsibility for deliverables lies with the primary proponent. Provide the names and information for any and all subcontractors and partners. Attach resumes and letters of commitment.

Name:	Hourly rate:
Phone:	E-mail:
Organization / Title:	
Expected duties for this campaign:	
Name:	Hourly rate:
Phone:	E-mail:
Organization / Title:	
Expected duties for this campaign:	
Name:	Hourly rate:
Phone:	E-mail:
Organization / Title:	
Expected duties for this campaign:	

*If more room is needed, this form may be copied or recreated.*

**EDUCATIONAL PROPOSALS APPLICATION FORM**  
Please print clearly or type all information on this application.

**A. APPLICANT INFORMATION**

1. Company Name/Organization Name/Individual Name:		
2. Business Type:		
3. Contact Name and Title:		
4. Person with Contract Signing Authority (if different from above):		
5. Business Mailing Address and Contact Information:		
City:	State:	Zip Code:
Phone: (    )		Fax: (    )
E-mail:		

I hereby certify that all information provided in this application and any attachments are true and correct.

Printed Name of Responsible Party:	Title:
Signature of Responsible Party:	Date:

**Third Party Certification** (if applicable).

I have completed the application, in whole or in part, on behalf of the applicant.

Printed Name of Third Party:	Title:
Signature of Third Party:	Date:
Amount Being Paid for Application Completion in Whole or Part:	Source of Funding to Third Party:



## **PROJECT CHECKLIST**

### **MARKETING PROPOSALS**

1. Completed application forms:
  - a. Application
  - b. Deliverables/Timeline
  - c. Estimated cost of project within \$700 thousand
  - d. Estimated cost of additional activities if a larger budget were available
  - e. Staff Information
  - f. Subcontractor and partner information
2. Communications campaign proposal:
  - a. Activity recommendations for a budget of \$700 thousand
  - b. Additional activity recommendations if a larger budget were available
3. Summaries of similar campaigns demonstrating qualifications, and references for those campaigns.
4. Resumes for all staff, partners and/or subcontractors.
5. Letters of commitment from partners and/or subcontractors.

### **EDUCATIONAL PROPOSALS**

1. Completed application forms:
  - a. Application
  - b. Cost summary
2. A detailed description and background of the program being proposed.
3. A description of the program's goals, and the need it is fulfilling.
4. A summary of the audiences the program is (or would be) geared toward, and the number of people exposed on an annual basis.
5. An analysis of the program's effectiveness to date, or a description of the potential effectiveness of the proposed program.
6. A statement of the amount of funding requested through this solicitation and what the funding would specifically be used for.
7. A statement of how much funding the organization plans to contribute (partial or match funding), if any, with letters of commitment.
8. A summary of experience and qualifications doing similar work.