

Carpet America Recovery Effort

Request for Proposals for the Marketing, Education and Outreach Professional Communications Services for the:

California Carpet Stewardship Program

OVERVIEW OF REQUEST

Carpet America Recovery Effort (CARE) is seeking proposals to provide Behavior Change Marketing, Education and Outreach (ME&O) professional communications services in support of the **California Carpet Stewardship Program** education and outreach strategy. Firms or individuals with expertise in marketing, communications and outreach are encouraged to apply. Experience in environmental, conservation, recycling and behavior change campaigns is preferred.

The scope of the project includes three principle focus areas:

1. Market Research and Analysis
2. Material Development, Targeted Messaging and Branding
3. Outreach Media (Earned media, social media and/or creative outreach)

Responses that include creative options to maximize Program reach, impact and effectiveness while leveraging added value are desired. Responses to this Request For Proposals (RFP) shall be used as the basis to enter into negotiations with selected respondent(s).

BACKGROUND

AB 2398 was signed into law in September 30, 2010, as the first legislation of its kind in the nation. A private-sector designed and managed statewide carpet stewardship program, this groundbreaking legislation was born out of a collaborative partnership between legislators, entrepreneurs, local governments, non-governmental organization and the carpet industry, forming the California Carpet Stewardship Program (Program). The purpose of the law is to increase the diversion and recycling of carpet in the state of California. CARE is a non-profit 501(c)3 organization, serving as the legislatively designated Carpet Stewardship Organization (CSO) for the Program.

CARPET STEWARDSHIP PLAN

Per legislation, manufacturers of carpet sold in the state of California are responsible for submitting a Carpet Stewardship Plan (Plan) either individually or through a CSO. As the legislatively designated CSO, and on behalf of its members, CARE has prepared and submitted such a Plan, serving as the principle guiding document for Program implementation through 2016. The latest version of the Carpet Stewardship Plan (ver. 3.2.2) was approved by CalRecycle Director on January 21, 2014 and is available on the CalRecycle website: <http://www.calrecycle.ca.gov/Carpet/Plans/>.

PROGRAM GOALS

The Program is actively working to achieve continuous and meaningful progress toward the following goals:

- Increased **Gross-Collection** of Post-Consumer Carpet from California Landfills
- Increased **Reuse** of Post-Consumer Carpet
- Incentivized **Market Growth** of Secondary Products made with Post-Consumer Recycled Carpet Content
- Increased **Conversion** (Recycling) of Gross Collected Post-Consumer Carpet to Recycled Output
- Increased **Recyclability** of Carpets

PROJECT PURPOSE

The purpose of this project is to implement the communications portion of the ME&O strategy for the Program in line with the approved Carpet Stewardship Plan (Plan) and governing legislation AB 2398, to achieve continuous meaningful progress toward the Program goals outlined above.

Education & Outreach forms a critical pillar in the Program implementation strategy. Pages 40-41 of the current Plan (3.2.2) outline the broad Education & Outreach approach for the Program. As such, these elements also appear throughout the Plan and especially within Performance Goals & Activities (Pages 10-20), Market Development and Promotion (Pages 28-29), and Financing Mechanisms (Pages 29-34).

Given this overlap in educational efforts, and with a recognition that Program success requires strong participation by many stakeholder parties, the Program combines Marketing, Education & Outreach promotion into a single (ME&O) strategy, outlined below. This project will serve to direct and support this overall strategy by providing critical research, design, production and dissemination services to effectively engage target audiences. Proposers should include strategies in accordance with social marketing trends and behavior change marketing methodology to maximize project outcomes.

Efforts Taken to Date (2011-2014): Phase I Foundational ME&O (*Complete*)

Beginning in January 2011, Phase I Start-Up ME&O efforts focused on necessary steps to establish the carpet stewardship assessment, develop an incentive structure, establish and coordinate with new and existing collectors and processors, and ensure Program mechanics between consumer, retailer, manufacturer and CSO, as well as processor and CSO, were all functioning appropriately to collect and administer the fund. This required significant outreach and education directed to the behind the scenes aspects of the program, both before the carpet gets to the consumer and after the collected material gets to a processor to be remanufactured into a new product. These efforts formed the often invisible but highly critical aspects of the strategy that were essential to getting the assessment established.

Education and outreach efforts taken to date are detailed further in the Plan, highlighted in the Program Annual Report, and presented in sections dedicated to each of the major stakeholder groups on the CARE website at www.carpetrecovery.org and include:

- **Website Resources**—Stakeholder specific materials and links
- **Retailer Education**—brochures, signage, window clings, education kits, outreach letters, webinars and industry presentations
- **Manufacturer Outreach**—trade publications news, magazine and radio interviews and earned media, outreach letters, software vendor engagement, sales webinar training, compliance and incentive participation and compliance
- **Consumer Education**—print earned media, database listing Earth911

- **Rural County Engagement**—presentations, webinars, monthly calls, planning, site visits, signage, brochures, handling and storage guidelines
- **Outreach Presentations**—Trade conferences and events

With this phase of the project complete, Phase II of the ME&O strategy is now underway. Firms and individuals responding to this request will support the Phase II effort.

Phase II Catalyzing ME&O (2014-2016):

Using these Phase I efforts as the foundation, Phase II ME&O is envisioned to look markedly different from previous efforts, as the program moves towards a broader stakeholder engagement strategy to catalyze improved results. The Program will continue to support recycling processors and technology development to maximize conversion of gross-collected materials into recycled output as a principal program element. In addition, Phase II ME&O seeks to enhance stakeholder participation, consumer facing promotional approaches, engagement of collectors, local governments and waste facilities, and promotion of post-consumer carpet product procurement to propel the Program to the next level.

PROJECT DESCRIPTION: PHASE II SCOPE OF WORK

CARE is seeking firm(s) or individual(s) to provide Phase II services concentrated through December 2014. CARE reserves the option to extend for up to (2) additional one-year terms (2015 and 2016), subject to performance, available funding and Program needs. An estimated budget not to exceed \$150,000 is available through 2014. Available budget for subsequent terms may be different from 2014, and be comprised of distinctive deliverables under the same broad Program goals. The Plan utilizes a multifaceted ME&O strategy to engage consumers, commercial building owners, carpet installation contractors, retailers, and other stakeholders to increase participation, collection, diversion and recycling of post-consumer carpet. Responding firms or individuals should propose the best strategy to improve reach, impact and effectiveness of Program ME&O efforts within the given budget.

The Phase II ME&O strategy concentrates efforts on four principle task areas:

1. Market Research and Analysis
2. Material Development, Targeted Messaging and Branding
3. Outreach Media (Earned media, social media and/or creative outreach)
4. *[Direct Engagement & Technical Assistance]—outside this RFP*

This RFP is seeking firms to provide services under Tasks 1, 2 and 3 above. CARE staff and outreach contractors will utilize tools and resources developed by the selected firm(s) to support Task 4 Direct Engagement and Technical Assistance through a concurrent and coordinated effort.

Task 1: Market Research:

Objective: In order to develop an effective ME&O strategy, the Program recognizes the importance of leveraging data and research from the marketplace to inform campaign messaging, branding and materials development to maximize reach, impact and effectiveness.

Market Research helps to more acutely define the target audience to determine the best opportunities for increased participation and develop appropriate messages with the highest probability of resonating with the selected target audiences to affect the desired behavior change. Additionally, market research provides

useful mechanisms to evaluate actual effectiveness of campaign strategies, to continually refine and improve communications mechanisms over time, and be responsive to the dynamic marketplace in which this Program functions.

Requested Task 1 Market Research Services include:

- Respondent should propose a specific scope of work to accomplish the objective of this task.
- Activities under this scope of work must include:
 - Conduct **new market research** to assess receptivity, knowledge, understanding and leverage points for key target audiences including customer, retailer, contractor
 - Obtain and evaluate **existing market research** from sources such as industry leaders, CARE, CRI, other EPR programs (paint, batteries, tires, etc.) to inform current status of the industry, customer/retailer/contractor receptivity, knowledge and potential action leverage points for engagement
- Creative strategies to accomplish these activities are requested from respondents and may include activities, such as:
 - Conduct **focus groups, interviews and/or surveys** to guide and refine educational strategies
 - **Survey** current recycling collection opportunities to more accurately assess current resources, opportunities and gaps present within the program
 - Conduct **stakeholder interviews** with local governments; transfer stations, landfills, C&D facilities, MRFs; retailer/contractors; collector/processors
 - **Other creative ideas** as suggested by proposing firm or individual
- Deliverables resulting from this task:
 - **Summary of data findings, including** identification of opportunities and recommendations for highest change potential based on research results.
 - Findings including refinements to Task 2 strategies based on research results
 - **Development of refreshed program brand and messaging** guidance elements to be utilized in Task 2 materials development.
 - Finalize key audiences and opportunities for engagement
 - Develop key images, themes and messages for program and each target audience
 - Utilize findings in all subsequent materials
 - Present findings and developed guidance elements to CARE through a formal presentation. Up to two major revisions must be included in bid.
- **Additional creative ideas as suggested by proposing firm or individual**

Task 2: Materials Development

Objective: Materials development includes the design, template creation and/or production of educational and promotional devices to engage target audiences, increase awareness and encourage Program participation. Materials will be designed utilizing market research generated and summarized in Task 1 above, and in line with community based social marketing and behavior change methodologies to engage audiences at the right time, with the right message to induce the right behavior.

Furthermore, the nature of the marketplace is such that carpet is a commodity that is discarded infrequently, in large quantities and at very precise moments in time. As such this commodity lends itself well to targeted education at specific leverage points (e.g. Point of Purchase, contractors tear-outs, retailer take back, etc.), with precise opportunities to be confirmed and guided by research results.

This approach acknowledges that depending on the audience, desired action or frequency of this action, the promotional engagement technique may vary. A consumer replacing carpet for the first time in a decade, has very different motivational leverage points as compared with a retailer disposing of post-consumer carpet from dozens of new installations each week. Local governments, recycling facilities, collectors and processors will also have unique perspectives. Given the breadth of target audiences, materials development will need to similarly provide varied approaches to stimulate action.

At the same time, it is equally essential that this targeted approach remain broadly thematic, to establish an easily identifiable brand, with high impact, resonance and recognition, which is reinforced through repetition over time. The precise collateral elements and quantities to be generated, will be guided by CARE in collaboration with the selected respondent, market research and available budget.

Given the available budget and broad program geographical reach, the strategy is envisioned to:

- Concentrate design and development activities on template generation to provide readily accessible/adaptable materials for outreach team members, local governments, businesses, and associations for production and/or dissemination
- Focus production of collateral on limited runs of highly targeted materials directed by target audience to effectively support Task 4 outreach engagement efforts
- Leveraging coordinated efforts with existing avenues of communications already in use by stakeholder agencies, associations, facilities and consumer groups to maximize dissemination.
- CARE may consider additional material production, outreach staff, or both to support the overall ME&O strategy in future years.

Coordination with Task 4 Activities: Please note, all materials and templates generated under Task 2 must support concurrent Task 4: Outreach, engagement and technical assistance being provided by CARE staff, contractors and stakeholder partners. Task 4 leverages direct interactions with current and potential program participants to influence behavior change. With this in mind, Task 2 should generate tools to engage target audiences at those locations and circumstances in which audiences are most responsive to the message. Presently, Task 4 outreach includes such activities as: targeted special events, conferences, trade shows; trainings/ workshops/ presentations; retailer/collector site visits/ waste assessments; contractor/installer support; local government/hauler coordination; customer inquiries.

Requested Task 2 Materials Development Services include:

- Respondent should propose a specific scope of work to accomplish the objective of this task.
- Activities under this scope of work must include:

- Development of **key education and outreach materials** to support target audience engagement and based on findings from market research Task 1.
 - Suggested possible material elements are presented below, however responding parties are encouraged to present creative strategies and recommendations to best leverage available resources beyond or in lieu of strategies below.
 - Respondents should describe why a particular approach is recommended.
 - Suggested strategies should take into consideration the geographical reach of this statewide Program, including multi-cultural and multi-lingual considerations. Key program materials may be requested in up to six languages.
- Potential target audiences may include groups such as:
 - Businesses
 - Retailers
 - Installation Contractors
 - Haulers/Operators
 - Collectors/Sorters/Processors
 - Manufacturers
 - Property Owners / Residents
 - Commercial Building Owners/Facilities Managers
 - Residential Homeowners/Renters
 - Local Governments
 - Solid Waste/Recycling Coordinators (Public Works Departments)
 - Planning & Building Departments (Permitting Departments)
 - Transfer Stations, Landfills, MRFs (Waste Hauling Agencies)
 - Procurement Agencies (Local, State, Federal)
 - Associations
 - Contractor/Building Associations
 - Trade/Industry Groups
 - Property/Real Estate Associations
 - Solid Waste/Recycling Associations
- Creative strategies to accomplish this activity, might include elements such as:
 - Targeted Template Creation, such as:
 - Newsletters
 - Bill Inserts, Post Cards, Door-hangers
 - Site Signage (Facility and Point of Consolidation)
 - Displays
 - Point-of-Purchase / Point-Of-Generation
 - Presentation Slide Deck
 - Target Website Assistance, such as:

- Refresh of CA Program materials within new branding skin of the CARE website at www.carpetrecovery.org
- Posting of new and downloadable materials as generated
- Targeted Materials Production, such as:
 - **Retailers**
 - Point Of Purchase Promotion (e.g. signage, cards, takeaways)
 - Cash register
 - Shelf cards
 - Learn more takeaway, bookmark/business card/etc.
 - Recycled content & recyclability
 - Compliance/Staff Educational Materials
 - Brochures/flyers
 - Engaging your contractors (key steps, request a waste assessment, how to guide)
 - Starting your own recycling program (how to kit)
 - **Installation Contractors**
 - Managing carpet tear-outs how to guide
 - Finding local recycling locations
 - Coordinating with your retailer
 - Selling recycling to your clients
 - Web support for businesses and associations
 - Event signage/displays
 - **Local Governments**
 - Program FAQ
 - Survey local resources, needs, gaps
 - Establishing recycling in your jurisdiction how to guide
 - Newsletter templates
 - Bill inserts for city/county/hauler bills
 - Handouts/displays for building/public works departments; include carpet management in green building protocols
 - **Facilities**
 - Program FAQ
 - Survey local resources, needs, gaps
 - Establishing recycling in your jurisdiction how to guide
 - Newsletter templates
 - Bill inserts for city/county/hauler bills
 - Public brochures
 - Signage for collection location
 - **Consumers**
 - Point of purchase signage/cards
 - Point of disposal signage/cards/brochures
 - Newsletters/bill inserts/door hangers
 - Postcards/business cards with recycling information
 - How to guide for DIYers
 - Event signage/displays

- Deliverables resulting from this task:
 - Educational resource kits (content collateral to be guided by respondent) aimed at up to 6 key target audiences
 - Editable template creation for at least 6 types of materials such as newsletters, bill inserts, signage, displays, presentations, etc.
 - Event materials and/or displays to support at least 6 regional outreach sets
 - Development and production of 3 or more Point-Of-Purchase materials/templates
 - Development and production of 3 or more Point-Of-Generation materials/templates
 - Website integration of generated materials onto the CARE website www.carpetrecovery.org
 - **Additional creative ideas as suggested by proposing firm or individual**

Task 3: Outreach Media (Earned Media, Social Media & Creative Strategies)

Objective: This task aims to conduct activities that successfully publicize the Program, utilizing public relations and creative strategies. For the purposes of this project, paid media buys are not included, rather outreach media such as earned media, social media and/or other creative strategies are requested.

Traditional paid media buys including paid Radio, TV and Print advertisements are not presently planned under this ME&O strategy. Due to the limited budget and broad service territory of California, it has been determined that media buys would be very costly and ineffective.

Earned media refers to favorable publicity resulting from proactive efforts others than paid advertising. Unlike paid advertising where each spot is precisely placed and paid for, earned media, on the other hand, appears in print, radio, television and/or online outlets as traditional news stories when an outlet deems a story to be news worthy. Earned media is this way, is not a sure thing; Rather like its name suggests, earned media is earned through thoughtful coordination with news outlets to educate and inform, as well as active creation of news worthy events, which encourage news outlets to produce pieces that provide visible coverage of the Program. Because these stories are generated by news outlets they can often be more effective than traditional advertisements, enticing the reader to action and providing third-party validation for the Program.

In addition to earned media, the use of social media outlets is also recommended as a low cost, high impact mechanism to reach targeted audiences. CARE already actively maintains an Online Blog with regular articles of interest related to industry and Program developments. Social Media efforts will aim to leverage this existing strategy (and perhaps others) for increased resonance. Respondents are encouraged to propose additional outreach media deemed to be effective at accomplishing this objective.

Requested Task 3 Outreach Media Services include:

- Respondent should propose a specific scope of work to accomplish the objective of this task.
- Activities under this scope of work include:

- **Earned Media—**
 - Develop, place and track earned media publicized events and estimated related impressions in such places as:
 - Traditional news print
 - Magazines
 - Trade publications
 - Web print
 - Association newsletters
 - TV coverage/interviews
 - Radio coverage/interviews
 - Actively work to cultivate earned media opportunities

- **Social Media—**
 - Develop, place and track social media posts and estimated related impressions in such places as:
 - Blog/Newsletters
 - Facebook
 - Twitter/Tumblr/etc.

- **Additional creative ideas as suggested by proposing firm or individual**

PROJECT SCHEDULE & SUMMARY OF REQUEST

Desired Services:	Market Research, Materials Development, Media Services
Requesting Party:	Carpet America Recovery Effort
Project:	CA Carpet Stewardship Program education and outreach effort
July 28, 2014	RFP Release Date
August 15, 2014	Proposals Due
August 15-31 st	Evaluation and Interviews with Selected Firm(s)
Agreement Start Date:	September 15, 2014
Budget Range:	Total budget through 2014, shall not to exceed \$150,000. Portions of this budget may roll-over into 2015, based on needs of the Program. Actual budget award subject to change.
Implementation Timeline:	Primary work under this scope shall be completed by December 2014. Respondents may propose implementation strategies which extend into 2015. All work outlined under this scope of work shall be completed by June 2015.
Term of Agreement:	September 2014—December 2014 (Year 1)
Option to Extend:	Option to extend term annually based on performance, available budget and/or other factors at CARE’s sole discretion. Annual available budgets may not resemble budget available during Year 1.

PROJECT BUDGET:

Total project budget for Tasks 1-3 shall not exceed \$150,000¹. Estimated budget ranges for each task are provided below.

Task 1: Market Research.....	\$50,000- 70,000
Task 2: Material Development/Production.....	\$60,000- 90,000
Task 3: Media Outreach (Earned/Social Media, Creative Outreach).....	\$10,000- 30,000
Total Not To Exceed Project Budget:	\$150,000

Final agreement with selected firm(s) will be written with a total project not to exceed budget. Firms may propose alternative budgets for each task, within the total not to exceed budget. CARE may elect to award less than the full project budget.

RESPONSE FORMAT

Interested parties must submit a proposal providing the following minimum information:

1. **Company Information:** Name and Primary Contact Information including: Name, Address, Phone, and Email. Include a list of specialized certification/designations, such as Small Business Enterprise, Disabled Veteran Business Enterprise, Woman-Owned Business Enterprise, Certified Green Business, if applicable.
2. **Company & Project Team Qualifications:** Overview of the firm or individual proposing to provide services, including business approach/philosophy, areas of expertise and specific project experience. Include a specific description of experience related to regional or statewide reach, multi-cultural/multi-lingual campaigns, behavior-change approaches. Provide short bios or resumes of key personnel.
1. **Proposed Project Approach by Task:** Provide a description of the proposed project approach and scope of work for each project task listed in this RFP, including a brief description of the work that would be completed, the firm or individual that will lead the work and key project deliverables/outcomes to be achieved.
2. **Work Plan:** Provide a timeline or work plan outlining major project components and milestones over time. Describe how you will ensure the project remains on task and on budget.
3. **Budget:** Include a summary of your proposed project budget by task. Differentiate materials and labor costs. Include a professional fee schedule outlining variable personnel or service rates, if applicable. Include number of allowable revisions, costs for specialized service such as translations and cost for additional changes, if needed.
4. **Project Examples:** Include brief descriptions of 2-3 example project campaigns, not to exceed 1 page per project, with reference contacts. Submit examples or projects that best demonstrate the individual or firm’s expertise.
 - o Explain the role the individual or firm played in each campaign or project.

¹Contracts will be written with a total project not to exceed budget. Estimated budgets for each major task are provided for reference only. Respondents may elect to propose more or less than these amounts as long as the total of tasks 1-3 does not exceed the total project budget. Overall cost effectiveness will be an evaluation criteria. CARE may elect to award less than the total project budget.

- Describe elements of campaign/project and creative materials developed.
 - Provide a client reference for each project who can provide information on the individual's or firm's participation in the project. Include reference's name, title, employer, email and phone number.
 - Provide websites and/or samples, if available, for projects discussed.
5. **Creativity:** Include additional information, recommendations, considerations, or creative offerings you wish to be considered by the evaluation committee.

SELECTION CRITERIA

A CARE selection Committee will review proposals in late August. A short list of respondent may be invited for interviews. A final selection is anticipated in early-mid September. Proposals will be evaluated based on the following elements. The selected candidate will be identified at CARE's sole discretion.

- Overall Presentation
- Qualifications & Experience
- Understanding of the Scope of Work
- Creativity / Leveraging / Innovative Approach
- Applicable Project Experience
- Specialized Experience (Multi-cultural, Environmental/Recycling, Behavior Change)
- Reasonable, Logical and Ambitious Workplan
- Budget/Cost Effectiveness
- Specialized certifications such as Small Business Enterprise, Disabled Veteran Business Enterprise, Woman-Owned Business Enterprise, Certified Green Business

SUBMISSION INSTRUCTIONS

Proposals must be received by **Friday August 15, 2014 @ 5pm PST**. All proposals must be emailed. Please note, faxed responses and hand-delivery will not be accepted. A single hard copy may be mailed to the delivery address below, but does not replace the electronic email submission.

Submit proposals to:

Email Delivery (Required): Brennen Jensen, CA Program Manager
bjensen@carpetrecovery.org
 Please use email subject line clearly marked: **CARE ME&O RFP**

Mail Delivery (Optional): Carpet America Recovery Effort
 Attn: Brennen Jensen, CA Program Manager
 400 Foam Street, Suite C
 Monterey, CA 93940

Printed proposals must be **double-sided**, printed on **100% post-consumer recycled content** paper, and be **recyclable**. Please do not include plastic covers or binders.

Total proposal length shall not exceed 12 pages. A timeline must be included. Up to three original marketing samples may be included in the proposal as additional exhibits beyond the page limit in support of Project Example experience.

DISCLAIMER AND CONDITIONS

This RFP and any responses to this request are for discussion purposes only. This RFP does not commit CARE to enter into an agreement with any responding party. CARE reserves the right to enter into agreement with one or more, or none of the respondents. No fees incurred by any respondent in preparation and submission of proposals or in anticipation of a contract shall be reimbursable. CARE reserves the right to make the selection based on its sole discretion, reject any and all Proposals, issue subsequent RFPs, postpone opening for its own convenience, remedy technical errors in the RFP process, approve or disapprove the use of particular subconsultants, negotiate with any, all or none of the Bidders, accept other than the lowest price offer, waive informalities and irregularities in the Proposals and/or enter into an agreement with another Bidder in the event the originally selected Bidder defaults or fails to execute an agreement with CARE. An agreement shall not be binding or valid with CARE unless and until it is executed by authorized representatives of the CARE and of the Bidder.

QUESTIONS

Please contact Brennen Jensen at bjensen@carpetrecovery.org or (831) 917-3720 with questions regarding this request. Questions received after August 8, 2014 may not receive a response.