Offeror's Name:	Duffy & Shanley	
,	RFP Information	
Title of RFP:	Rhode Island Energy Efficiency and Resources Management Council Request for Proposals: 2021 Public Education Events & Outreach,	
RFP Number:	RFP# EERMC-2021-02	
	Offeror Information	
Legal Name of Offeror	Deeffer 9 Character Inc.	
Type of Entity (i.e. corporation, partnershipsole proprietorship):	Corporation p,	
Mailing Address of Primary Place of Busine	10 Charles Street Providence, RI 02904 ess:	
Phone Number:	Main: 401-274-0001	
Website:	www.duffyshanley.com	
	Contact Person for the Offeror	
Name:	Meaghan Wims	
Title: Director of Public Affairs		
Mailing Address:	10 Charles Street Providence, RI 02904	
Phone Number:	c. 401-261-1641	
Email Address:	mwims@duffyshanley.com	
Meaghan K. Wim		

Printed Name, Title

# **DUFFY®SHANLEY**

Rhode Island Energy Efficiency and Resources Management Council Request for Proposals – 2021 Public Education Events & Outreach RFP# EERMC-2021-02

II. DUFFY & SHANLEY TECHNICAL PROPOSAL

March 22, 2021

#### A. OVERVIEW

We are excited to submit a proposal to support the Rhode Island Energy Efficiency and Resources Management Council's public education and outreach efforts on energy topics, notably the plans for a Public Forum and a series of Energy Lectures and promotion of a series of educational videos.

The following is our technical response for this project.

We are ramped up, informed and prepared to immediately begin work with your team:

- We're uniquely well-versed in Rhode Island's energy industry: D&S has the most robust and experienced Energy Practice in the region, led by communications and brand professionals that have spent more than a decade fully immersed in the most challenging power generation and transmission issues facing our area. We have professional relationships with many of the state's energy partners, and a wealth of experience in the category beyond the state's borders. A short list of current and recent clients: Ørsted and Eversource (formerly Deepwater Wind), Rise Light & Power, D.E. Shaw Renewable Investments, ETHOS, LS Power, Invenergy and National Grid. Past clients are Niagara Mohawk Power, Providence Gas and others.
- Along with our full complement of communications services, we are steeped in the strategy, planning, marketing and execution of public outreach events within the energy space and across other industries, in-person and virtual.
- We are a deep, flexible team of professional communicators who are experts in making complex information like energy efficiency and energy resources approachable and interesting for diverse audiences.

The bottom line: We commit to bring you our best people, thinking and talents, to successfully produce and market your 2021 energy outreach events and video series.

Our work plan to achieve the project scope, plus information on our qualifications and team, samples of relevant work, and references follow below.

## **B. WORK PLAN**

## PHASE 1: DISCOVERY – APRIL 2021

We have a unique jumpstart, based on our work within the energy space over more than a decade. That said, our first phase of work always begins with gaining a clear understanding of project goals and key message points; identifying target audiences; mining institutional knowledge; and determining available partners and assets.

The challenges and opportunities of the energy sector are some of the most complex and significant topics facing Rhode Island today, particularly as the Ocean State is uniquely susceptible to the harmful effects of climate change. Solving for these challenges and leveraging

opportunities to promote clean energy, energy efficiency and energy equity will all be critical to the state's long-term, post-pandemic economic recovery.

We would work closely with the team from EERMC and OER to develop a framework for a relevant, dynamic and engaging Public Forum and a series of Energy Lectures that together tackle some of the most noteworthy topics in energy. Absent that important collaboration, here's an early look at our thinking:

# **Potential Event Topics**

- Public Forum: The Future of the New England Energy Grid Lessons Learned from Texas, with keynote speaker Russell Gold, *Wall St. Journal* climate and energy reporter and the author of the bestselling *Superpower: One Man's Quest to Transform American Energy*
- Lecture Series: The Future of Energy under Biden Administration; Role of Environmental Justice in Energy; Offshore Wind's Big Year

# PHASE 2: EVENT PLANNING AND MARKETING PLAN DEVELOPMENT – MAY 2021

In this phase we develop the logistical and communications plans for the events, as well as marketing plans to support the events and the educational video series. Here's a look at what we have in mind, at this early stage:

# **Tactics**

To include:

- Event planning, including speaker identification and messaging development; branding; detailed Run of Shows; site visits; vendor management; photo and video production; collateral development
- Earned media
- Digital marketing strategy and execution, including audience targeting
- Stakeholder engagement and leveraging outreach channels (i.e., Environment Council of Rhode Island; Northeast Clean Energy Council; New England Women in Energy and the Environment)
- Paid social strategy and execution
- Results tracking

# **Events' Format**

We would aim for an in-person Public Forum to kick off the initiative (depending on COVID-19 restrictions and comfort level of EERMC/OER), although we would be prepared for either a hybrid event with provisions allowing for virtual attendance or, if necessary, a fully virtual event. D&S has experience coordinating all manner of events and could pivot easily depending on the current state of affairs.

## PHASE 3: EVENT AND PROGRAM EXECUTION – SUMMER AND FALL 2021

# **Timeline**

We envision hosting the Public Forum in May or June 2021, and the three energy lectures in September, October and November 2021.

We anticipate marketing the series of educational energy videos in Q3 and Q4 of 2021.

# THROUGHOUT: ADMINISTRATION AND ANALYSIS

Throughout the nine-month process to complete this project, D&S's Energy Practice will work closely with EERMC leadership to provide careful project strategy, management and supervision:

- Timelines
- Budget planning and supervision
- Coordination of creative, production and account teams and outside vendors
- Monthly reporting
- Day-to-day communication with client contacts and regularly scheduled status meeting

## C. COMPANY PROFILE

We're a creative, collaborative, independent communications company, waving the flag for brands and causes we believe in. And educating Rhode Islanders about energy is certainly a worthy cause – one in which we've been deeply involved for years.

We turn 48 in 2021, and we're proud. Duffy & Shanley is one of the longest-running integrated marketing communications firms in New England, which we feel says a lot about our work. We have been around for so long due to our continuing evolution as a firm.

We're pioneers. We were one of the first agencies in New England to create an interactive division, *dsi*, in 1997. And we were one of the first agencies to adopt and lead in social media and influencer marketing, winning campaign awards when both were just getting on the radar of other firms. We are committed to the digital revolution that is occurring in our industry.

We're leaders in our field. We have an award-winning team recognized for best practices in launching new brands, consumer products, digital, production and public relations campaigns. Every day, our talented team is immersed in projects that tackle the region's most complex issues.

In particular, D&S has the most robust and experienced Energy Practice in the region, led by communications and brand professionals that have spent more than a decade fully immersed in the most challenging power generation and transmission issues facing our area.

# **Snapshot of Energy Practice Clients**





















# **EVERSGURCE**

# **More Client Pride**

In addition to our work for these energy industry leaders and many Rhode Island state agencies, we are proud to serve top regional and national clients. This diverse client roster allows our team to be on the leading edge of the most current and effective marketing communication strategies.

Another snapshot:





















UNITEDhealthcare"

# **Agency Capabilities**

We have brought together digital strategists, creatives, content generators and storytellers to form our vision on the changing world of communications. We are excited to share our story with you.

To reach today's consumers, we offer best-in-practice expertise in content development, social media, partnerships, public relations, events, digital and much more. But at the core, all must be driven by great ideas. An overview of our full capabilities:

- 1. Advertising
- 2. Brand Development/Brand Visibility
- 3. Brand Protection/Crisis Communications
- 4. Competitive Analysis
- 5. Corporate Communications
- 6. Branded Materials Development (i.e., collateral, apparel, equipment)
- 7. Customer Communications
- 8. Digital marketing

- 9. Social Media Strategy and Execution
- 10. Public Affairs
- 11. Research
- 12. Content creation, including copywriting and video production
- 13. Media Relations
- 14. Media Training
- 15. Event Creation/Support/Management

### D. RELEVANT EXPERIENCE

# E. EXAMPLES OF PRIOR WORK

D&S has a demonstrated track record of success supporting Rhode Island state agencies and public interest events and campaigns, with particular experience in the energy industry. We've

spent years collaborating with state agencies, policymakers, ENGOs and other advocates in the energy space.

# **Sampling of Relevant Experience**

# Ørsted/Eversource (Formerly Deepwater Wind)

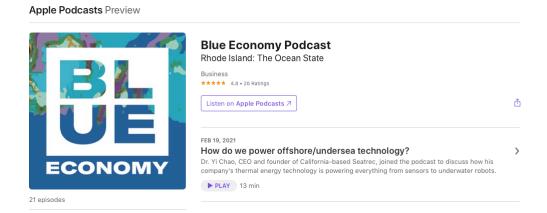
The American offshore wind industry went power-up with the launch of Deepwater Wind's Block Island Wind Farm. As their Agency of Record since their founding more than a decade ago (and continuing with our work today to support the Ørsted/Eversource joint project portfolio in the Northeast), we were tasked with building credibility – and eliciting goosebumps – for an upstart company in a complex and incredibly exciting new industry. We leveraged a number of high-profile press events to tell the story, including events at ProvPort, at the new U.S. Offshore Innovation Hub and – most notably – at-sea at the Block Island Wind Farm.



### **Rhode Island Commerce**

For the past three years, Duffy & Shanley has promoted the state of Rhode Island nationally and internationally, targeting prospective businesses to move to Rhode Island. Our business attraction efforts on behalf of Rhode Island Commerce have been primarily focused on the fast-growing, so-called "super-sector" that is the Blue Economy.

As part of those ongoing efforts, we created and currently produce the **Blue Economy Podcast**, a long-form, business-to-business interview show highlighting influential business leaders operating in and around the world's seas. Since its launch in February 2020, we have published 20 episodes totaling more than 10 hours of original content, and we have accumulated more than 16,000 downloads, roughly 15% of which have come from an overseas audience.



Additional work with Rhode Island Commerce includes: Forging partnerships between Commerce and national organizations like the American Wind Energy Association; and – in recent months – creating videos, organizing virtual events and supporting other informational efforts to help Rhode Island's business owners navigate the COVID-19 crisis.

Prior to that, D&S conceptualized, executed and marketed the then-Rhode Island Economic Development Corporation's Green Economy Roundtable and Advancing the Green Economy public forums.



# **American Ocean Summit**

D&S conceptualized a new, high-profile national event – the American Ocean Summit – to spotlight Rhode Island's leadership in the blue economy. Event originally scheduled for Fall 2020 but paused due to pandemic.



# Other High-Profile Energy Events in RI

D&S played supporting roles in the event planning and media outreach for recent energy industry events hosted in Rhode Island, including the American Wind Energy Association's annual Offshore WINDPOWER Conference and the International Partnering Foundation (IPF) annual event.

# More Rhode Island State Agencies - RIDOT, BHDDH, RIDOH, RIDE

We've been honored to develop and produce TV campaigns and/or web videos for each of these state agencies over the past three years, educating Rhode Islanders through: three TV campaigns about distracted driving TV; BHLink, dangers of fentanyl, and medication assisted treatment; creating awareness of RI's new sexual health app; and to support the mental health of elementary school children and their families.

# **Community-Focused Events**

# Iced Coffee Day

As you can see, we love a good event. When we're going through the planning process, our goal is to help our clients create events that make a lasting impact on their audience – events that continue to produce results well after the ribbons are cut and the TV cameras pack up and go home. One of our favorite community events? Iced Coffee Day for Dunkin'.

Held annually since its launch in 2010, Iced Coffee Day is, essentially, a corporate fundraiser for Hasbro Children's Hospital. Since our team started working with Dunkin' in 2017, it's evolved into a local holiday. By partnering with the creator of the well-known, grassroots tradition of Good Night Lights, and by surprising guests with celebrity appearances at Dunkin' drive-thru windows across the state, we've helped Dunkin' earn a groundswell of media attention (and, in the process, helped raise more than \$500,000 for Hasbro Children's Hospital).

# It Can Wait

AT&T launched its national *It Can Wait* program in 2010 to raise widespread awareness about the dangers of texting while driving. Our challenge, as AT&T's public relations agency for New England, was to give that national campaign a local identity – and bring our message directly to local drivers.

We forged a partnership between AT&T, then-Rhode Island Attorney General Peter F. Kilmartin and the Rhode Island State Police and executed a *years-long* campaign. We wrote op-eds for the local newspapers; we went on TV news to talk about new studies; we brought distracted driving simulators to every corner of the state; and we scheduled and executed dozens of school assemblies every year.

If you're interested in seeing more samples of our work, we invite you to visit our website, duffyshanley.com.

# F. REFERENCE INFORMATION

#### Lauren Burm

Ørsted, Head of Public Affairs NA Public Affairs, Communication & Sustainability 617-309-8730 LAUBU@Ørsted.com

# Jeffrey Grybowski

CEO, US Wind (former CEO, Deepwater Wind)
401-952-2622
j.grybowski@uswindinc.com

### **Matthew Sheaff**

Interim Chief Marketing Officer Rhode Island Commerce 401.490.0688 Matt.Sheaff@Commerce.ri.gov

## **Clinton Plummer**

CEO, Rise Light & Power <a href="mailto:clint.plummer@riselight.com">clint.plummer@riselight.com</a> 201-450-7761

# G. IDENTIFICATION OF STAFF

We're a close-working team of 30, comprised of strategists, account managers, creatives and production specialists, most based in Providence just one block away from RI EERMC. At any one time, we are working concurrently on projects for 30 or so clients who trust us for our ideas, service, passion, execution and follow-through.

Account and project oversight are managed by thoughtful, experienced leaders and communications veterans who head up each account. They work with a dedicated production team to execute and deliver great strategic, creative products and events.

Here's an overview of the D&S staff who will serve as your core team and who will work on your behalf with the full support of agency resources.

Jon Duffy, President
Meaghan Wims, Director of Public Affairs; Head of Energy Practice
Chris Raia, Senior Account Executive, PR
Michael Silvia, Creative Director/Partner
Suzanne Griscom, Vice President, Digital Strategy
Justine Johnson, Media Planner

Their roles and responsibilities for your project follow:

# H. STAFF RESPONSIBILITIES STRATEGIC PLANNING Leads: Jon Duffy Meaghan Wims EVENT CONTENT DIGITAL & CREATIVE MANAGEMENT DEVELOPMENT & MARKETING DEVELOPMENT MEDIA RELATIONS Lead: Leads: Leads: Lead: Michael Silvia Chris Raia Suzanne Griscom Chris Raia Meaghan Wims Justine Johnson

### I. STAFF EXPERIENCE

See separate Attachment A, which provides bios and qualifications of the agency team.

# J. CONFLICTS OF INTERESTS

There are no known conflicts of interest between Duffy & Shanley and our affiliates and any distribution company or their affiliates; nor any conflicts of interest between the agency and any member of the EERMC.

# K. LITIGATION

There is no litigation, nor any disputes, claims of complaint, events of default or failure to satisfy contract obligations or to deliver products, involving Duffy & Shanley or affiliates, relating to services similar to those solicited by EERMC.

# L. INVESTIGATION

We confirm that no partners or employees of Duffy & Shanley are under investigation by any governmental agency and have not in the last four years been convicted or found liable for any act prohibited by state or federal law in any jurisdiction involving conspiracy, collusion or other impropriety with respect to bidding on any contract.

# **DUFFY®SHANLEY**

Rhode Island Energy Efficiency and Resources Management Council Request for Proposals – 2021 Public Education Events & Outreach RFP# EERMC-2021-02

DUFFY & SHANLEY TECHNICAL PROPOSAL ATTACHMENT A: STAFF EXPERIENCE

March 22, 2021



JON DUFFY
President | jduffy@duffyshanley.com
Role for EERMC: Project Strategic Planning

Jon is President of Duffy & Shanley, New England's largest independent marketing communications firm. As President of the agency, Jon is responsible for the culture, creative environment and partner relationships. In addition, he oversees the agency's consumer public relations, public affairs and social media marketing teams servicing clients such as AT&T, Partners HealthCare, Ørsted, BJ's Wholesale Clubs, Foster Grant, Rhode Island Commerce and College Ave. He is also chartered with leading the agency's efforts in progressive marketing initiatives.

Jon is very active in the community with a passion for Rhode Island and the energy sector. He served as Co-Chair of Governor Gina Raimondo's transition team, Chair of the 2017 National Governor's Association Summer meeting, Chair of the Greater Providence Chamber of Commerce Board of Directors, Chair of Trinity Repertory Company Board of Trustees, member of the Board of Directors of the Boys and Girls Clubs of Newport and as an Overseer of the Providence Children Museum. He currently serves as Admiral of the Rhode Island Commodores. In addition, he served as the co-chair of Special Olympics Rhode Island's Capital Campaign. He is a graduate of the 1998 Leadership Rhode Island Class. He is a past President of Advertising Club of Rhode Island and a recipient of the Rhode Island Advertising Club's Annual Award for "outstanding achievement." Jon earned a B.S. in business administration from Georgetown University.



# **MEAGHAN WIMS**

Director of Public Affairs | <a href="mwims@duffyshanley.com">mwims@duffyshanley.com</a> Role for EERMC: Project Manager; Energy Content; Event Support

Meaghan is Director of Duffy & Shanley's Public Affairs Group, where she's spent the last decade working at the intersection of politics, business and media. Meaghan tackles the region's thorniest business issues, specializing in the areas of energy and the environment, healthcare and business and financial services. Meaghan provides strategic communications, executive counsel and media relations for Fortune 500 companies such as AT&T, Dunkin' and UnitedHealthcare, as well as for emerging brands and regional companies and campaigns, such as Ørsted/Eversource, Rise Light & Power and Rhode Island Commerce.

Meaghan's work has earned the agency national recognition from PR-Week and Bulldog Reporter and she's routinely recognized as one of New England's best PR professionals. Meaghan joined D&S after six years as an award-winning reporter at The Providence Journal, the Associated Press and other regional publications. Meaghan earned a B.S. in political science and journalism from the University of Rhode Island. .



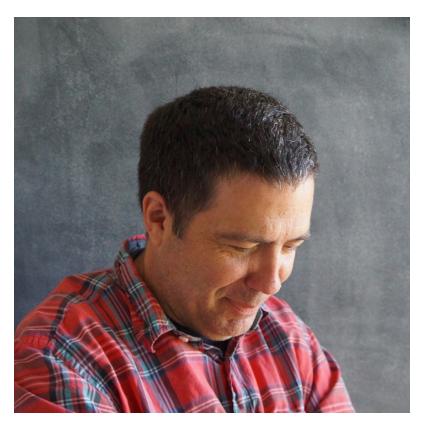
**CHRIS RAIA** 

Senior Account Executive | <u>craia@duffyshanley.com</u> Role for EERMC: Content Producer; Event Management; Media Relations

Chris is a Senior Account Executive in Duffy & Shanley's Public Relations and Public Affairs Groups. A media relations specialist with prior experience as a producer in WPRI-12's local newsroom, Chris plays a major role in executing successful communications campaigns and media events for a wide range of clients, from national brands like Dunkin' and UnitedHealthcare to nonprofits and local businesses such as Boys and Girls Club of Rhode Island, Isle Brewers Guild, iXblue Defense Systems, Rhode Island Commerce and Navigant Credit Union. His tenacity earns his clients top-rate media exposure that grows and builds their brands.

Chris is Executive Producer of the Blue Economy Podcast which promotes the State of Rhode Island.

A Maryland native, Chris earned his B.A. in communications from Marist College in Poughkeepsie, N.Y. He's Mount Pleasant Little League's second-longest-tenured volunteer baseball coach.



MICHAEL SILVIA

Creative Director/Copywriter | msilvia@duffyshanley.com
Role for EERMC: Lead Creative and Production

Mike is Creative Director and Partner at Duffy & Shanley. He's responsible for the day-to-day management, motivation and inspiration of our team of designers, art directors, writers, programmers and producers.

Mike's been the force behind notable Agency creative for every one of our energy industry and State of RI clients; in addition to working on Intel, Staples, AAA, Foster Grant, and others. He's a frequent judge at advertising award competitions around the country, has worked with brands like Nike, Reebok, Burton and P.E.T.A., and has served as a creative consultant to Coca-Cola's Sprite brand.

Mike earned degrees in music and elementary education from West Chester University in Pennsylvania.



**SUZANNE GRISCOM** 

VP of Digital | <u>sgriscom@duffyshanley.com</u> Role for EERMC: Digital Strategy, Execution and Analysis

Suzanne is Vice President of Digital Strategy at Duffy & Shanley. A seasoned digital marketing professional with deep roots in tourism and hospitality marketing, Suzanne directs digital strategy for clients such as AAA, Ørsted U.S. and Chewsi. She's led digital campaigns for Rhode Island Tourism, Greater Providence/Warwick Convention and Visitors Bureau, and other blue-chip D&S clients. She joined D&S after serving as Director of Digital Marketing at Collette and Senior Digital Brand Marketer at Hasbro, developing strategies for the company's Preschool brands, including Playskool, Play-Doh, Tonka and Sesame Street.

Suzanne earned a B.S. in business administration from the University of Massachusetts.



JUSTINE JOHNSON

Media Planner | jjohnson@duffyshanley.com

Role for EERMC: Media Planning, Execution and Tracking

With a background in digital, project management and marketing program coordination from Hasbro, Creative Circle and global agencies Digitas and Racepoint, Justine is responsible for planning and implementation of media and content for our clients. She is a critical liaison among Duffy & Shanley's account service, creative and media disciplines, deftly balancing and blending right and left brain on our clients' behalf. Justine is also responsible for managing the agency's media and production coordination for National Grid, Ørsted and all other energy clients.

Justine is a Rhode Island native. She earned a B.S in Communications from St. Anselm's College. A talented photographer, her work has been featured in national magazines and regional galleries.

Offeror's Name:	Duffy & Shanley, Inc.	

Please see Sections 1.5, 1.6, 1.7, 3.6, 3.7, and 3.8 of the RFP for additional information.

	YES	$\bigcirc$	NO ( $X$ )
Is the offeror a State certified ISBE			
(MBE, WBE or Disability Business	If YES	, provide the	total dollar amount
Enterprise):	represe	enting work th	nat will be done by the
	offeror	••	
			\$

Identification of ISBE Subcontractors (Please add rows as necessary)			
		The total dollar amount	
ISBE Subcontractor's	ISBE Mailing Address, Email	representing work	
Name	Address, and Phone Number	that will be done by	
		the ISBE	
		Subcontractor	
Be Moore Interpreting	33 Summer St., Pawtucket, RI 02860 401-261-8696		
[translation services]	info@bemooreinterpreting.com		
		\$2,500	
	649 Hope St., Bristol RI 02809		
Cromwell Public Affairs	401-440-0090		
	cara@cromwellpublicaffairs.com		
[communications and event support]			
support,		\$2,000	
		\$4,500	

# ISBE Proposal - Participation Rate and Signature Page

Offeror's Name:	Duffy & Shanley, Inc.		
A. Total amount of dollars representing work that will be done by the ISBEs:		\$	4,500

done by the ISBEs:	\$4,500
B. All-Inclusive Price Listed in the Cost Proposal:	\$30,000
ISBE Participation Rate (=A/B):	15 %_

Meaghan K. Wims	3/19/21
Signature of Authorized Person	Date

\_\_Meaghan Wims, Director of Public Affairs
Printed Name, Title

Offeror's Name:	Duffy & Shanley
	·

**Task Sheets.** Please add or delete rows for team members and add or delete task tables as needed.

Task 1:			
	Lal	bor Costs	
Subcontractor or Team Member Name and/or Job Title	Hourly Rate	Estimated Hours	Evaluated Price (Hourly Rate * Estimated Hours)
Account Service – Comms., Digital and Marketing	\$150	65	\$9,750
Event Planning	\$150	80	\$12,000
	For this RFP we offer a discounted, blended hourly rate of \$150/hour for all personnel/job functions, providing cost savings over the sum total of the entire project.		
Addition	nal expenses tha	t are not includ	led in hourly rate
Description of Expense			Price
In-Person Event Expenses (space rental fees, refreshments, AV, et al)			\$8,000
Virtual Event Expenses (i.e., Zoom account if needed)		\$250	
	Total Tas	k Price:	<u>\$30,000</u>

# Cost Proposal - All-Inclusive Price and Signature Page

Offeror's Name: Duffy & Shanley, Inc.			
One All-Inclusive Price. This number any other costs and expenses charged to	r represents the sum of all total task prices and EERMC.		
All-Inclusive Price	<b>\$30,000</b>		
Meaghan K. Wims	3/19/21		
Signature of Authorized Person	Date		

Meaghan Wims, Director of Public Affairs

Printed Name, Title