



kick-ass marketing for bold brands [teamksa.com](http://teamksa.com)

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**Technical Proposal Draft**  
**2021 Public Education Events & Outreach RFP**  
**RFP #EERMC-2021-02**  
**March 29, 2021**

Prepared for:



STATE OF RHODE ISLAND  
**ENERGY EFFICIENCY &  
RESOURCE MANAGEMENT COUNCIL**

## Primary Contact

Katie Schibler Conn, Founder

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401-681-4900

## Secondary Contacts

Megan Keating, Executive Assistant

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857-265-6519

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401-741-4433

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## A. Overview

You are part of a bold industry. We are a bold agency.

We know that energy efficiency and resource management is a complicated story to tell. We know that organizations such as the Rhode Island Energy Efficiency and Resources Management Council have a difficult myriad of stakeholders and audiences to engage. We recognize that authentic, engaging and relevant stories require a simple message.

To do this project right, you need a partner who is tenacious with details and data, passionate about climate change and energy change management, and capable of managing projects in the most efficient manner to deliver reliable results.

Based in Warwick, KSA crafts kick-ass marketing for bold brands. Founded in 2011, we have steadily grown year over year, referral by referral, to a staff of fifteen employees and a dedicated roster of subject-matter expert subcontractors. For event production, our preferred subcontractor is TMW Productions, LLC, who is included in this RFP.

Over the past few years KSA and TMW Productions have successfully collaborated on several projects. They've assisted us in creating memorable events for our clients that have made lasting impressions.

KSA is a certified Women's Business Enterprise (WBENC), Women-Owned Small Business (WOSB) and WBE in the State of Rhode Island. KSA Marketing + TMW Productions welcomes the opportunity to partner with the Rhode Island Energy Efficiency and Resources Management Council for the Educational Videos RFP.

**As an agency, KSA is uniquely positioned to serve the diverse needs of the State of Rhode Island and the EERMC, offering:**

1. Decades of event production experience ranging from global giants such as PepsiCo to local legends such as Lifespan, the Gloria Gemma Breast Cancer Foundation, and the Newport Middletown Howard Johnson
2. Deep experience marketing workforce and economic development programs, business-to-business programming and public events
3. Our "Hero's Journey", a three-stage strategic framework, is a KSA process blending the science of marketing with the art of storytelling



We are ready to help the Rhode Island EERMC and the state deliver on your energy goals for 2021.

Thank you in advance for your time and consideration.

Warmly,

Katie Schibler Conn

Founder, KSA Marketing

## B. Work Plan

Each organization is different, and each marketing strategy should be unique.

KSA combines three vital elements: the art of storytelling (Hero's Journey) with the science of marketing (Scientific Method for Digital Advertising) and the creative consistency of archetypes (Archetypes in Branding).

For EERMC's public education events and outreach needs, we will break the work into two parallel work streams with an Account Director working with our campaign coordinators leading the overall project management of all EERMC related activities.

Throughout the project you can expect the following from us:

- Kick-off and goal setting meeting at the project beginning
- Bi-weekly status calls conducted over zoom with key stakeholders and staff
- Written bi-weekly status reports

Karen Jedson, our account director, and our campaign coordinators Amelia Oates and Josh Reyes will serve as day-to-day contacts throughout the entire project from April - December 2021.

### **Task 1: Plan, Coordinate, Facilitate and Market a Half-Day Public Forum** *May 2021 - November 2021*

**Main Tasks: \$5,425**

#### Speaker Coordination and Recruitment

- Assume one moderator/host along with multiple speakers

#### Event Planning and Recruitment

- Reserve event locations for in-person events
- Manage setup for Zoom for virtual events
- Set up attendee registration
- Act as the main contact to field questions from event registrants
- Send out email communications to event registrants
- Perform program run-through with all stakeholders before the event
- Facilitate check-in for attendees for in-person events
- Ensure event programming is running on time
- Ensure audio/visual is working and setup properly for presentation; ensure program is being recorded
- Create and distribute attendee event surveys

#### Graphic Design

- Social graphics and landing page design

#### Campaign Coordination

- Campaign set-up, audience research, event landing page creation, campaign management

#### **Subtask: \$3,800**

- Software fees for Zoom meetings with 300 participants
- Meeting room rental: University of Rhode Island's Memorial Union Ballroom
- Paid Digital Advertising: Facebook, Instagram, LinkedIn
- Speaker Compensation

### **Task 2: Plan, Coordinate, Facilitate and Market Energy Lecture Series**

*May 2021 - November 2021*

#### **Main Tasks: \$7,850**

#### Speaker Coordination and Recruitment

- Assume one moderator/host along with multiple speakers

#### Event Planning and Recruitment

- Reserve event locations for in-person events
- Manage setup for Zoom for virtual events
- Set up attendee registration
- Act as the main contact to field questions from event registrants
- Send out email communications to event registrants
- Perform program run-through with all stakeholders before the event
- Facilitate check-in for attendees for in-person events
- Ensure event programming is running on time
- Ensure audio/visual is working and setup properly for presentation; ensure program is being recorded
- Create and distribute attendee event surveys

#### Graphic Design

- Social graphics and landing page design x 3 events

#### Campaign Coordination

- Campaign set-up, management, audience research, event landing page creation, campaign management set-up

#### **Subtask: \$5,500**

- Software fees for Zoom meetings with 300 participants
- Meeting room rental: University of Rhode Island's Memorial Union Ballroom
- Paid Digital Advertising: Facebook, Instagram, LinkedIn
- Speaker Compensation

### **Task 3: Create and Execute Event Outreach Strategy**

*August 2021 - December 2021*

#### **Main Task: \$8,250**

- Campaign strategy and plan
- Identify best graphics for campaign
- Audience research, campaign management, campaign tracking and optimization

#### **Subtask: \$6,000**

- Professional fees
- Paid social and digital video placements

### **Task 4: Final Report and Presentation**

*December 2021*

#### **Task Budget: \$2,600**

- Report oversight and presentation
- Presentation graphics and layout
- Report creation and presentation

#### **Subtask: \$6,000**

- 30-second video for TV and digital placement

**Total Budget: \$45,425**

## C. Company Profile

KSA Marketing is a marketing agency with ingenuity in archetype-led branding, maximizing media spend and crafting integrated creative campaigns. But most of all, we're there for our clients.

### Our client experience includes:

- **Economic + Workforce Development:** MassHire Advanced Manufacturing Consortium, Rhode Island Nursery Landscape Association, Rhode Island Commerce, SCORE Rhode Island
- **Destination + Tourism:** City of Warwick, Newport Howard Johnson, the Gamm Theatre, Trinity Rep, SpringHill Suites, Margin Street Inn, Warwick Center for the Arts, BoldrDash, McGraff Clambakes, Brainweek Rhode Island
- **Legacy Brands:** PepsiCo, Ocean State Harley Davidson, Scialo Bros. Bakery, Stanley's Burgers, American Mussel Harvesters, Reade Advanced Materials
- **Education:** Saint Anselm College, New England Institute of Technology Center for Technology + Industry, Association of Athletic Training Education

### Statistics:

- Established in 2011
- Staff of fifteen and growing
- Brand archetypes lead our strategic approach
- Digital and traditional media expertise
- Campaign delivery from inception through execution
- Headquartered in The Tide Mill, the oldest building in Warwick, RI
- Longest standing client relationship: 10 years (PepsiCo)
- Average client contract length: 3-5 years

### Certifications:

- Women Business Enterprise (WBENC)
- Woman Owned Small Business (WOSB)
- Rhode Island WBE
- Goldman Sachs 10,000 Small Businesses alumni

### Memberships/Associations:

- Central RI Chamber of Commerce
- Employers Association of New England
- Advertising Marketing Professionals of Rhode Island (AMP-RI)
- Forbes Agency Council

## D. Relevant Experience

### MASSHIRE - REMAKE 4.0

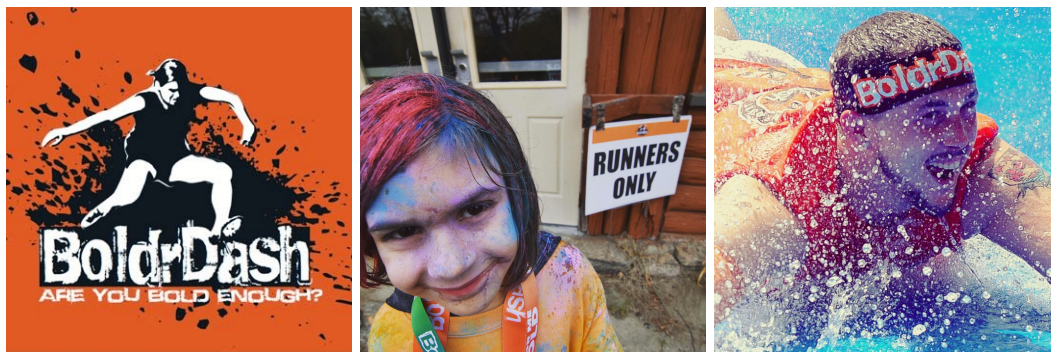


Services Highlight: Virtual Job Fair, awareness campaign roll-out

The Central Region Advanced Manufacturing Consortium + State of Massachusetts were awarded a grant to institute training programs for Employer demand-driven workforce development programs to attract, train and place underemployed and unemployed adults into advanced manufacturing.

KSA was tasked with creating a bold, stand-alone brand for the initiative and the associated marketing assets to engage both employers and recruits KSA provided naming, branding, a communications plan, website creation, SEO, media planning + strategy, collateral, and social media strategy + execution for a Fall 2019 awareness campaign rollout, statewide rollout expected 2020.

### BoldrDash (In Person Events)



Since 2012, KSA has constructed paid, earned and owned campaigns that strategically target obstacle course race enthusiasts.

**Results:**

- Grew email subscribers 10x
- Social media followers +17.8%
- 17% increase in participants ages 31-50
- From 2015 to 2017 out-of-state participation increased from 21 to 28%

**Testimonial:**

*“Katie and all the folks at KSA are wonderful to work with. Their attention to detail and marketing expertise has helped us grow as a company and expand our brand awareness throughout New England.”*

*Lynn Hall  
President, BoldrDash*

**Gloria Gemma Breast Cancer Resource Foundation**

Services Highlight: branding, positioning, web refresh, marketing plan, social media strategy and execution, print creative, advertising, media relations, grassroots, strategic partnerships.

**LIFECycle (Barrington, RI, nonprofit)**

Services highlight: branding, positioning, web refresh, marketing calendar planning and management, social media strategy and execution, print creative, media buying and planning, grassroots, strategic partnerships, event management.

## E. Examples of Prior Work:

### **READE ADVANCED MATERIALS**

READE Advanced Materials is a legacy brand with a family history that stretches close to 400 years. Today, READE is an ISO certified Service-Disabled Veteran-Owned Small Business that partners with manufacturers and sources raw inorganic chemicals and high-quality materials for research to support increased productivity for development projects all around the world.

They are one of the country's leading distributors of specialty chemical solids, and they partner with manufacturers to source raw inorganic specialty chemical solids of the highest quality that meet all specifications, are competitively priced and delivered on-time.

**Length of Relationship:** 2019 to present

**Client Contact:**

Elisabeth Law  
Director of Marketing  
[elaw@reade.com](mailto:elaw@reade.com)  
401-330-1082

**Industry:** Chemical Manufacturing

### **Campaign Overview: Strategic SEO + Content Marketing Services (2019 - 2020)**

#### **Project(s) + Services**

More efficiently reach their audience by revamping their website and increasing search engine optimization by transforming the user experience and streamlining the Request for Quote Process.

- Digital Audit
- Website Development + Refresh
- Search Engine Optimization
- Partnerships + Press

#### **Results (bulleted + tangible numbers where possible)**

KSA has helped READE Advanced Materials preserve their lengthy family business history and use their story to connect to today's buyers.

Before KSA: Product Page Visitors (Jan. 1, 2019 - Sept. 11, 2020)



- 2017 Product Line Card: 20 Unique Visitors
- 2018 Product Line Card: 1 Unique Visitor

At Present with KSA: Product Page Visits (July 1 - Aug. 15, 2020)

- 15 unique visitors
- 7 potential leads - can be converted to customers

Project in-market leads for 2020 with improvements: 36

### Testimonial(s)

“In the eight months we have been working with KSA, I have learned more about various aspects of my business than in the past eight years! KSA has helped me preserve my lengthy family business history and use that story to connect to today’s buyers. Working with KSA is a bit like Christmas...each meeting is full of unexpected pieces of information, takeaways and insights that are delightful surprises. Thank you KSA for all of your hard work, interest, and partnership in our marketing company!”

Elisabeth Law | Marketing Director | READE Advanced Materials

### PEPSICO

Since 2011, KSA has been PepsiCo’s go-to partner to deliver its most complicated, integrated marketing partnerships on a national and global scale. KSA helps oversee the development and implementation of all creative elements from retained PepsiCo agencies, managing approvals and implementation with talent, properties and strategic partners.

### Services

- Talent Management
- Global Campaign + Market Approvals
- Toolkits + Best Practices
- Project/Shoot Production Management
- Strategic Consultation

### Length of Relationship: 2011 to present

### A few of our favorite projects/campaigns from the past decade include:

- Lay’s Leo Messi Sponsorship, 2012-2020
- Pepsi Global Soccer, 2011, 2014-2020
- Pepsi Beyoncé Global Tour + Sponsorship, 2013
- Pepsi’s Short Film: Black Knight Decoded featuring Usher, 2016
- Gatorade Global Football Campaign, 2014, 2016
- Global Foods Group Market Reviews, 2020

- Doritos For the Bold Campaign + Toolkit, 2013
- Nicki Minaj Pepsi Live for Now Global Campaign, 2012
- Lay's Global Enrique Iglesias Sponsorship, 2016
- 7Up Fido Dido Campaign, 2018-2020
- Serena Williams Fund PSA, 2016
- Pepsi Generations/Vintage Campaigns, 2018
- PepsiCo UEFA Sponsorship, 2016-2020

### Testimonial(s)

“KSA is an outstanding global partner for PepsiCo. They are highly collaborative, hugely dedicated, and very agile...all helping us deliver highly complex global programs.”

Adam Warner | Senior Director | Global Sports Marketing | PepsiCo

## F. References:

Below are active client references which you have KSA's permission to contact:

**David Chenevert**

Executive Director

The Rhode Island Manufacturers Association

(401) 751-0160

davec@mfgri.com

Length of Relationship: 2018-Present

**Karen Blomstedt**

General Manager

Newport Middletown Howard Johnson Inn

401-849-2000 ext. 316

[manager@newporthojo.com](mailto:manager@newporthojo.com)

Length of Relationship: November 2020 - present

**Kelley French**

Deputy Director, Masshire/reMAke 4.0

978-786-9634

[kfrench@masshirenorthcentralwb.com](mailto:kfrench@masshirenorthcentralwb.com)

Length of Relationship: 2019 - present

**Steven H. Kitchin**

Vice President

Corporate Education and Training, New England Institute of Technology

401-739-5000

[skitchin@neit.edu](mailto:skitchin@neit.edu)

Length of Relationship: 2019 - present

**Christine Smith**

Managing Director, Innovation

Rhode Island Commerce Corporation

[christine.smith@commerceri.com](mailto:christine.smith@commerceri.com)

401-278-9197

Length of Relationship: 2020 - present

## G. Staff and Subcontractors

KSA staff to be involved:

- Karen Jedson, account director
- Laurie Lewis, director of culture + operations
- Susan Rentz, director of talent + quality
- David Bradley, digital strategist
- Taylor Butts, data immersion designer
- Amelia Oates, campaign coordinator
- Olivia Marcello, campaign coordinator
- Joshua Reyes, campaign coordinator
- Ryan Ferrer, copywriter

## H. Staff Responsibilities

The proposed staffing structure for the event production is as follows:

### **KSA Staff Responsibilities:**

**Karen Jedson, account director:** strategic lead, responsible for leading engagement with senior EERMC stakeholders and driving overall strategy

**Amelia Oates/Olivia Marcello, campaign coordinators:** day-to-day communication and project management, internally and externally. Responsible for driving timelines, coordinating project details, preparing written recaps and reports.

**Joshua Reyes, campaign coordinator:** assistance with research, project organization and script outlines

**Taylor Butts, data immersion designer:** leads all research, stakeholder interviews and discovery

**Ryan Ferrer, copywriter:** concepting and scriptwriting

**Susan Rentz:** oversight of project management and quality control

**David Bradley:** assistance with stakeholder interviews, discovery and strategy

**Laurie Lewis:** contracts, compliance and billing

## I. Staff Experience

KSA has a passionate, agile team inclusive of senior subject matter experts and execution specialists versed in connecting digital and traditional channels.

### Leadership Team



**Katie Schibler Conn** A classically trained marketer and founder of KSA, Katie has 20+ years of agency experience leading integrated marketing initiatives for global brands such as Pepsi, SKYY Spirits, and PlayStation. Katie is an industry leader, delivering complex marketing campaigns and forging meaningful business-to-business marketing partnerships with a focus on workforce development. Katie is a past president of the Association of Marketing

Professionals of RI (AMP-RI), a member of the Forbes Agency Council, and an alumna of the Goldman Sachs 10,000 Small Businesses program.



**David Bradley** Author, managing director of Bbg, Inc., founder of Consulting MBA, and strategic advisor to KSA Marketing, David is a professor of marketing – both literally and figuratively. He’s a strategic simplifier, finding the most effective means while efficiently reaching goals. He has authored two books on digital strategy and has been retained by a variety of organizations, from startups to Fortune 100s. Expansive thinking, cross-disciplinary understanding, and strategic perspective married with an

insatiable curiosity keep David keenly aware of and engaged by his clients unique

circumstances, and ready to develop action plans. He received his M.B.A. from Providence College, has had his books used in undergraduate and graduate classrooms, and has taught over 11,600 students virtually and at his undergraduate alma mater, Rhode Island College.



A born and raised Rhode Islander, **Karen Jedson** has 30+ years of experience in the marketing industry. Karen is an experienced leader with a proven track record working with government officials, local community leaders, and tourism development practitioners. She has exceptional skill in public relations, economic development, and events promotion developed through her accomplished career in tourism and economic development. Karen previously served as Director for Tourism, Culture and

Development for the city of Warwick, Rhode Island, was a member of the Northeast Economic Development Association and Discover New England, and sat on several statewide boards and commissions, including the Providence Warwick Convention & Visitors Bureau where she served as the Marketing Chairperson. Jedson joined KSA full-time in 2020 as the Director of Media Relations, using her marketing expertise to handle all of KSA's public relations, hospitality and economic development-related clients, while growing and developing her team.

### Laurie Lewis



Laurie has 30+ years of experience in administration, management, and operations. She oversees KSA's day-to-day operations, financial management, and is in charge of nurturing our agency culture through staff development, team bonding and value-driven leadership. For over five years, Laurie has been instrumental in the agency's growth and is the glue that keeps it together.



## Relevant Staff Bios:

### Tarah Warner, MBA, FMP



Tarah is the President and Chief Executive Officer for TMW Productions, LLC. She has earned experience in the fields of customer service, sales, marketing, front-line food service, hospitality, event planning, contracted food service management, catering, business data and analytics. She has been fortunate to be a part of the following organizations; Compass Group North America accounts such as DePaul University, Elmhurst College and Dominican University. Additional companies include Radisson Hotels and Johnson & Wales University. Her experience has brought her from the state of Pennsylvania to Illinois and finally Rhode Island. In her “free” time she is an active Rotarian with the Pawtuxet Valley Rotary Club and was the President of the club from 2017-2019. Tarah also enjoys working with Rotary District 7950 on various committees and initiatives. She was selected to receive the

prestigious Paul Harris Fellow award. Tarah possesses an A.S. in Restaurant Management, B.S. in Food Service Management with a concentration in Event Sales and Meeting Management, and an M.B.A. in Accounting from Johnson & Wales University in Providence, Rhode Island. She is also a Certified Food Management Professional.



### Haley Noviello

Haley is the Sponsorship Development Specialist and an Event Associate with TMW Productions, LLC. She was born and raised in West Greenwich, Rhode Island and graduated from Pace University in 2018 with a B.A. in Film and Screen Studies. Haley has spent her career working in various roles throughout the events and entertainment industry. She has worked with companies such as NBC Universal, the Tribeca Film Festival, and the Rhode Island International Film Festival. Haley enjoys spending her free time caring

for and showing Arabian horses, a hobby which she has pursued for the last 10 years.

**Taylor Butts, Data Immersion Designer:** Taylor is a data driven marketer who makes decisions based on evidence gathered from research and experimentation. His approach to marketing fuses creativity and analytics in order to ensure any solutions served to clients will not only be original and inspired, but also successful in their implementation and execution.

**Amelia Oates, Campaign Coordinator:** Amelia graduated in May from Fairfield University with a B.A. in Public Relations with minors in Communication, Marketing, and International Studies. She started as a KSA summer intern in 2018 and has since officially joined the team. Amelia contributes strategy and writing skills and helps manage the workflow for campaigns for the New England Institute of Technology, the Association of Athletic Training Education, the Newport Middletown Howard Johnson and Rhode Island Commerce.

**Olivia Marcello, Campaign Coordinator:** Olivia joined the KSA team during the COVID-19 pandemic. She graduated from Emmanuel College where she was a member of the Women's Lacrosse team (Go Saints!). After graduating, she took a job at Clark University working in their Athletics Department, covering all 17 of their Varsity Programs. She only works to fund her chocolate and travel addictions and is always dreaming of a new place to visit.

**Joshua Reyes, Campaign Coordinator:** Josh graduated in 2019 from the University of Rhode Island, receiving a B.S. in Public Relations with a minor in Business. He interned with the URI Department of Marketing and Communications, then as a Business Development intern for the Rhode Island Small Business Development Center. Post graduation, Josh worked at ADP Inc. and CVS Health. He recently joined KSA and is working on integrated marketing strategies for several of the agency's clients.

**Ryan Ferrer, Copywriter:** Ryan, a Manila, Philippines resident, joined KSA and provides copywriting and new business development support for the agency. A graduate of the University of Manila, Ryan has experience in software development, as well as sales and marketing. He previously interned for David Bradley, KSA's strategic advisor. Ryan loves waking up and doing what he does for our clients every day. Ferrer prepares copy for clients as well as assists with the agency's outbound sales.



## J. Closing Statement

In summary, KSA Marketing in conjunction with TMW Productions, LLC welcomes the opportunity to work with the Rhode Island Energy Efficiency and Resources Management Council. We are passionate about the state of Rhode Island, sustainability and climate change and the economic impact of the Blue-Green economy.

We are confident we have the talent, resources and grit to successfully deliver exquisite and memorable to meet your marketing goals. As an agency we are committed to transparency and tenacity when it comes to our client partnerships, which we strongly believe will be necessary to successfully deliver a project of this scale by the end of 2021.

### *Legal and liability statements:*

- *KSA has no known conflicts of interest*
- *KSA has never been nor is currently involved with any litigation*
- *KSA Marketing nor its employees or subcontractors are under investigation nor have been found liable or convicted*