



AGREEMENT FOR ENERGY EFFICIENCY AND CLIMATE PUBLIC AWARENESS CAMPAIGN

This AGREEMENT FOR ENERGY EFFICIENCY AND CLIMATE PUBLIC AWARENESS CAMPAIGN OUTREACH (“Agreement”) is between PivotPath LLC having a principal place of business located at 930 New Hope Rd STE 11-628 Lawrenceville, GA 30045 (“PivotPath”), and the Rhode Island Energy Efficiency and Resource Management Council (the “EERMC”), a council created by R.I. Gen. Laws § 42-140.1-3, for event and outreach services to be provided by PivotPath for the benefit of the EERMC and for the EERMC’s payment therefore.

WHEREAS, pursuant to R.I. Gen. Laws § 42-140.1-3(b)(4), one of the EERMC’s purposes is to “[p]romote public understanding of energy issues and of ways in which energy efficiency, energy conservation, and energy resource diversification and management can be effectuated”;

WHEREAS, pursuant to R.I. Gen. Laws § 42-140.1-6(b), the EERMC is authorized “...to engage consultants and professional services as necessary and appropriate to fulfill its purposes.”;

WHEREAS, on July 20, 2023, the EERMC voted to approve the Council’s 2024 budget, including an allocation of Eighty Five Thousand Dollars (\$85,000) for an energy efficiency and climate public awareness campaign;

WHEREAS, on January 29, 2024, the EERMC issued Request for Proposals number EERMC-2024-01 entitled “EERMC Energy Efficiency and Climate Public Awareness Campaign” (the “RFP”) to solicit proposals from qualified offerors to support the EERMC in its responsibility of providing public education and outreach, which RFP is attached hereto as Exhibit A and incorporated herein by reference;

WHEREAS, on February 19, 2024, PivotPath submitted a Proposal for an Energy Efficiency and Climate Public Awareness Campaign in response to the RFP (“Proposal”), which Proposal is attached hereto as Exhibit B and incorporated herein by reference;

WHEREAS, on March 21, 2024, during its regularly scheduled and publicly noticed monthly meeting, the EERMC selected PivotPath as the successful bidder for the RFP and voted to award a contract to PivotPath, with a budget limit of Eighty-Four Thousand Five Hundred Dollars (\$84,500).

NOW THEREFORE, in consideration of the foregoing recitals and the covenants contained herein, the EERMC and PivotPath hereby agree as follows:

ARTICLE 1 – AGREEMENT TERMS

Unless otherwise stated herein, the terms of the Agreement shall be in accordance with the EERMC’s Procurement Guidance Document, available at <https://rieermc.ri.gov/wp-content/uploads/2021/05/final-eermc-procurement-procedures.pdf>, which are hereby expressly incorporated by reference into this Agreement.

ARTICLE 2 – RESPONSIBILITIES OF THE PARTIES

PivotPath hereby agrees to provide all materials, equipment, apparatus, tools, labor, services and facilities and everything incidental, requisite and proper to perform the activities and obligations as described in the attached Scope of Work.

If requested by the EERMC, PivotPath shall be responsible for developing an updated Scope of Work including detailed deliverables and a specific timeline for 2024 activities, subject to approval by the EERMC. PivotPath shall be responsible for completing all tasks and deliverables included in Section 5: Project Description and Scope of Work of the RFP (see Exhibit A), unless otherwise directed by the EERMC.

EERMC shall be responsible for providing guidance to PivotPath as requested and for approving invoices for payment.

ARTICLE 3 – TERM AND SCHEDULE

This Agreement will remain in place for one (1) year from the date of execution (“Initial Term”). The parties agree that EERMC may renew this Agreement for up to two (2) additional one-year periods (“Extended Term”) if approved by the EERMC and agreed to by PivotPath. If an Extended Term is sought and agreed to, this Agreement must then be modified in writing accordingly.

Any work to be performed under this Agreement shall be commenced in accordance with the schedule specified in Exhibit B. PivotPath shall prepare and provide updated schedules in writing as requested by the EERMC.

ARTICLE 4 – USE OF WORK PRODUCT

The parties agree that any and all materials generated by PivotPath as a result of this Agreement will be with the support of EERMC funds. All such materials will be made available to the EERMC for future use by the EERMC, including but not limited to dissemination to the public in future education efforts. All materials must be provided in an editable format to the EERMC.

Any and all content generated in connection with this Agreement shall be the sole property of EERMC. PivotPath hereby expressly waives any and all copyright claims to any content generated in connection with this Agreement. PivotPath shall not use any materials, including but not limited to video content, generated or created in connection with this Agreement without the express, written permission of the EERMC.

ARTICLE 5 – CONTRACT PRICE

During the Initial Term, the contract price paid to PivotPath for the work shall be as specified in Exhibit B, the attached Proposal (“Contract Price”). The Contract Price shall be all-inclusive for the work required by the relevant project cost and schedule in accordance with the Proposal attached as Exhibit B.

Hourly pricing shall be firm through December 31, 2024. The EERMC may request to renegotiate pricing at any time if there is a significant change in program activity, at its discretion. Any such renegotiated pricing shall be subject to negotiation and must be mutually agreed to by the parties, in writing.

ARTICLE 6 – PAYMENTS

PivotPath shall submit monthly invoices for work completed during monthly billing periods or in accordance with the payment milestones otherwise stipulated in Proposal attached as Exhibit B. The EERMC shall be responsible for review, approval, or request for revision of all invoices. The parties understand and agree that all invoices approved by EERMC will be remitted to Rhode Island Energy for payment. Invoices shall be submitted by PivotPath to: Steven Chybowski (steven.chybowski@energy.ri.gov), Rachel Sholly (rachel.sholly@gmail.com), and Craig Johnson (craig.johnson@nv5.com).

ARTICLE 7 – NOTICES

Notices required or permitted under this Agreement shall be sent to the following parties:

PivotPath: Elizabeth M'balu Oke
President & CEO, PivotPath LLC
930 New Hope Rd STE 11-628
Lawrenceville, GA 30045
elizabeth@pivotpathdigital.com

EERMC: Steven Chybowski
Chief Program Development - Energy Efficiency
Rhode Island Office of Energy Resources
One Capitol Hill, 4th Floor
Providence, RI 02908
Steven.chybowski@energy.ri.gov

Rachel Sholly
Education & Communication Lead
Optimal Energy / NV5 – EERMC Consultant Team
225 Dyer St., 2nd Floor
Providence, RI 02903
rachel.sholly@gmail.com

[Craig Johnson](#)
Consultant
Optimal Energy / NV5 – EERMC Consultant Team
225 Dyer St., 2nd Floor
Providence, RI 02903
craig.johnson@nv5.com

ARTICLE 8 – ENTIRE AGREEMENT

This Agreement, including the Exhibits, constitutes the entire Agreement between the EERMC and PivotPath with respect to the services specified. All previous representations relative thereto, either written or oral, are hereby annulled and superseded. No modification of any of the provisions of this Agreement shall be binding unless in writing and signed by a duly authorized representative of each party hereto.

ARTICLE 9 - NO JOINT VENTURE

The parties agree that this Agreement shall not create a legal partnership or joint venture.

ARTICLE 10 - JURISDICTION AND VENUE

This Agreement shall be exclusively governed by and construed in accordance with the laws of the State of Rhode Island. If any party to this Agreement shall bring any proceeding against any other party arising out of this Agreement, that party shall bring said proceeding in the Providence Superior Court of Rhode Island and each party hereby submits to the exclusive jurisdiction of that court for purposes of any such proceeding. PivotPath hereby consents to personal jurisdiction under the terms of this Section for resolution of any dispute arising hereunder.

ARTICLE 11 – UNDERSTANDING

The Parties acknowledge that they have had the opportunity to consult with legal counsel regarding this Agreement and that accordingly the terms of this Agreement are not to be construed against either party because that party drafted the Agreement, nor shall such terms be construed in favor of any Party because that Party failed to understand the legal effect of its provisions.

ARTICLE 12 – INDEMNIFICATION

The parties shall be solely responsible for the payment of all their employees, agents, servants, and independent contractors, in furtherance of this Agreement. PivotPath hereby agrees to indemnify and hold the EERMC harmless from and against any and all claims, damages, penalties, or expenses, including attorneys' fees, incurred on account of any claim made by any employee, agent, servant, or independent contractor of PivotPath with respect to services provided or work performed in connection with this Agreement.

ARTICLE 13 – EFFECTIVE DATES, AMENDMENTS AND TERMINATION

This Agreement shall take effect upon execution by both parties ("Effective Date") and shall remain in effect for the Initial Term, unless earlier terminated. Neither party may assign or transfer all or any portion of this Agreement without the prior written consent of the other party. This Agreement or any of its terms may be amended or waived only by mutual written agreement by both parties. Either party may terminate this Agreement at any time and for any reason by giving thirty (30) days prior written notice to the other party.

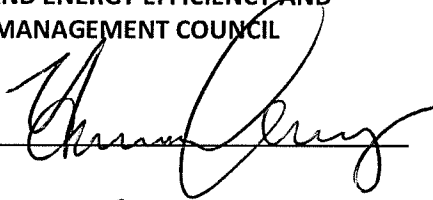
ARTICLE 14 – SEVERABILITY

If any section, term, or provision of this Agreement should be held invalid for any reason, the remainder of this Agreement shall not be affected thereby and shall remain in full force and effect.

IN WITNESS WHEREOF, each party hereto has caused this Agreement to be executed by its duly authorized representative on the day and year set forth below.

**RHODE ISLAND ENERGY EFFICIENCY AND
RESOURCE MANAGEMENT COUNCIL**

Signature: _____



Name: _____

HARRY OAKLEY

Title: _____

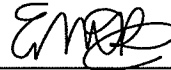
CHAIR

Date: _____

APRIL 18, 2024

PIVOTPATH LLC

Signature: _____



Name: _____

Elizabeth M'balu Oke

Title: _____

President & CEO

Date: _____

April 12, 2024

EXHIBIT A:
Request for Proposals

The Rhode Island Energy Efficiency
and Resources Management Council
 (“EERMC”)

Request for Proposals
 (“RFP”)

RFP Title:	EERMC Energy Efficiency and Climate Public Awareness Campaign
RFP Number:	EERMC-2024-01
RFP Issuance Date:	Monday, January 29, 2024
Deadline to Submit Questions:	Monday, February 5, 2024 at 5:00 PM ET
Proposal Submission Deadline:	Monday, February 19, 2024 at 5:00 PM ET

SECTION 1: GENERAL INFORMATION

- 1.1. **Summary.** The Rhode Island Energy Efficiency and Resources Management Council (“EERMC”) is issuing this request for proposals (“RFP”) to solicit proposals from qualified offerors to help the EERMC fulfill its mandate to promote public awareness of energy efficiency programs and their benefits. Specifically, the EERMC is seeking an entity to provide strategic marketing consultation, communication planning, and implementation of a public awareness campaign of energy efficiency’s foundational role in addressing climate change and achieving the State’s clean energy goals.
- 1.2. **EERMC.** EERMC is a council authorized, created, and established pursuant to the laws of the State of Rhode Island (“State”). See R.I. Gen. Laws §42-140.1-3. EERMC council members are appointed by the State Governor with the advice and consent of the State Senate, and the Commissioner of the Rhode Island Office of Energy Resources (“OER”) serves as the EERMC executive director. See R.I. Gen. Laws §42-140.1-4. In accordance with R.I. Gen. Laws §42-140.1-6, EERMC is authorized to engage consultants and professional services as necessary and appropriate to fulfil its statutory purposes which are to:
- Evaluate and make recommendations, including, but not limited to, plans and programs, with regard to the optimization of energy efficiency, energy conservation, energy resource development; and the development of a plan for least-cost procurement for the State;
 - Provide consistent, comprehensive, informed and publicly accountable stakeholder involvement in energy efficiency, energy conservation, and energy resource management;
 - Monitor and evaluate the effectiveness of programs to achieve energy efficiency, energy conservation, and diversification of energy resources; and
 - Promote public understanding of energy issues and of ways in which energy efficiency, energy conservation, and energy resource diversification and management can be effectuated.
- 1.3. **Equal Opportunity Policy.** In accordance with R.I. Gen. Laws §28 -5.1-10, any selected offeror(s) who contract(s) with EERMC must possess the same commitment to equal opportunity as prevails under federal contracts controlled by federal executive orders 11246, 11625 and 11375. The selected offeror(s) may be required to submit an equal employment opportunity plan as proof of commitment. For more information, please contact the Rhode Island Equal Opportunity Office within the Rhode Island Department of Administration’s Division of Equity, Diversity, and Inclusion at 401.222.6398 or visit <https://dedi.ri.gov/divisions-units/equal-opportunity-office>.
- 1.4. **Minority Business Enterprises, Women Business Enterprises, Disability Business Enterprises, Veteran Business Enterprises.** The EERMC reserves the right to review any and all proposals and to award additional points, or other consideration, to those offerors and/or subcontractors that are qualified as Minority Business Enterprises (MBE), Women Business Enterprises (WBE), Disability Business Enterprises (DBE), Veteran Business Enterprises (VBE), or other similar state and/or federally qualified businesses.

This consideration shall extend to businesses that are qualified in all states and jurisdictions, not limited to Rhode Island. Proof and demonstration of such qualification shall be the responsibility of the firm submitting a proposal.

- 1.5. **Utilization of Subcontractors.** Subcontractors are permitted, provided that their use must be clearly indicated in the proposal. To the extent possible, all proposed subcontractors must be identified in the proposal.
- 1.6. **Public Disclosure of Proposals.** All proposals received by EERMC in connection with this RFP are subject to the Rhode Island Access to Public Records Act (“APRA”), R.I. Gen. Laws §38-2-1, et. seq. Once an award is made and upon receiving an APRA request, all proposals will be released by EERMC unless EERMC finds that the certain portions of information contained within the proposals are exempt from public disclosure pursuant to R.I. Gen. Laws §38- 2-2(4). Offerors are advised to clearly mark or label “confidential” any portions of information within their proposals that they believe are “[t]rade secrets and commercial or financial information obtained from a person, firm, or corporation which is of a privileged or confidential nature.” When responding to an APRA request, EERMC will take into consideration any information marked by the offeror as confidential. However, broad disclaimers that label the entire proposal as confidential will not help EERMC in its APRA analysis and may not be considered.
- 1.7. **Costs Associated with Submitting a Proposal.** All costs associated with developing or submitting a proposal in response to this RFP, or to provide oral or written clarification of its content shall be borne by the offeror. EERMC assumes no responsibility for these costs.
- 1.8. **Right to Cancel this RFP.** This RFP may be cancelled at any time and/or all proposals may be rejected.
- 1.9. **Misdirected Proposals.** Any proposals misdirected to other state locations, or which are otherwise not present in the office of the Contact Person at the time of the submission deadline for any cause will be determined to be late and may not be considered.
- 1.10. **Proposals Irrevocable.** Proposals are considered to be irrevocable for a period of not less than sixty (60) days following the submission deadline, and may not be withdrawn, except with the express written permission of EERMC.
- 1.11. **EERMC Website.** Offerors are instructed to peruse the EERMC website and any other pertinent websites listed in Section 2.1 of this RFP on a regular basis, as additional information relating to this solicitation may be posted there from time to time. See Section 2.1 of this RFP for pertinent website address(es).
- 1.12. **Right to Transact Business in Rhode Island.** In accordance with R. I. Gen. Laws §7-1.2-1, et seq., no foreign corporation, a corporation without a Rhode Island business address, shall have the right to transact business in the State until it shall have procured a Certificate of Authority to do so from the Rhode Island Department of State. Please contact the Rhode Island Secretary of State’s Business Services Division at 401.222.3040

or visit <http://sos.ri.gov/divisions/business-portal> for more information. This is a requirement only of the selected offeror(s).

- 1.13. Availability of Funds.** The purchase of services under an award made pursuant to this RFP will be contingent on the availability of funds.
- 1.14. Insurance.** Prior to being issued a final award, the selected offeror(s) will be required to possess all necessary insurance, as determined by the EERMC, and continue to possess such insurance throughout the life of the award.
- 1.15. Indemnification.** The selected and awarded offeror shall hold harmless and indemnify the EERMC and the State from and against any and all losses, damages, claims, suits, actions, liabilities, and/or expenses, including, without limitation, attorneys' fees and disbursements of any character that arise from, are in connection with or are attributable to the performance or nonperformance of the offeror or its subcontractors under an award stemming from this RFP.

SECTION 2: AGENCY CONTACT PERSON AND OFFEROR SUBMISSION AND FORMATTING REQUIREMENTS

- 2.1. Contact Person.** Any communication regarding this RFP must be made in writing and directed to the Contact Person whose information is listed in the table below. Revised and/or additional information regarding this solicitation may be posted on the Pertinent Website(s) listed in the table below.

Contact Person	Steven Chybowski
Mailing Address	Rhode Island Office of Energy Resources One Capitol Hill, 4 th floor Providence, RI 02908
Email Address	cermc.rfp@gmail.com
Pertinent Website(s)	http://www.riecrmc.ri.gov/

- 2.2. Important Dates.** Important dates regarding this RFP are listed in the table below.

RFP Issuance Date	Monday, January 29, 2024
Pre-Proposal Conference Date	Not Applicable
Deadline to Submit Questions	Monday, February 5, 2024 at 5:00 PM ET
Proposal Submission Deadline	Monday, February 19, 2024 at 5:00 PM ET

- 2.3. Pre-Proposal Conference.** There will be no pre-proposal conference for this RFP.

- 2.4. Written Questions.** Prospective offerors may submit written questions pertaining to this RFP. Questions must be emailed as a Microsoft Word or searchable PDF attachment to the Contact Person. The deadline to submit questions is listed within the table in Section 2.2 of this RFP. Questions and EERMC's responses will be posted on the Pertinent Website(s) within one week from the question due date.
- 2.5. Amendments to this RFP.** If this RFP is amended or addendums are issued, written notice of the amendments and/or addendums will be posted on the Pertinent Website(s).
- 2.6. Submission Deadline.** All Proposal components must be received by the Contact Person by the Submission Deadline as listed within in the table in Section 2.2 of this RFP.
- 2.7. Submission Requirements.** Each Proposal must be emailed to the Contact Person and must include the following three (3) components:
- One (1) original Technical Proposal and Cover Sheet. This must be a separate file named "Technical Proposal". Please use the attached Cover Sheet template.
 - One (1) original Cost Proposal. This must be a separate file named "Cost Proposal". Please use the attached Cost Proposal template.
 - One (1) original Certifications Component, which includes participation rates of offerors and subcontractors that are certified as Minority Business Enterprises (MBE), Women Business Enterprises (WBE), Disability Business Enterprises (DBE), Veteran Business Enterprises (VBE), or other similar state and/or federally qualified businesses. This must be a separate file named "Certifications". Please use the attached Certifications Component template.
 - The electronic versions must be in a searchable PDF format unless otherwise permitted by the Contact Person.
- 2.8. Formatting of Written Documents.** For clarity, the Technical Proposal should be typed with sections clearly labeled to correspond with the pertinent RFP sections. These documents should use 1" margins on 8.5"x 11" paper using a font of 12 point. Technical Proposals should be a maximum of ten (10) pages not counting any attachments. Each attachment should be referenced appropriately within the proposal section and the attachment title should reference the proposal section it is applicable to. The Cover Sheet, Cost Proposal, and Certifications Component should be typed using the attached templates.

SECTION 3: EVALUATION AND SELECTION PROCESS

- 3.1. Technical Review Team.** Proposals will be evaluated and scored by a technical review team, comprised of EERMC Council Members, in accordance with the criteria contained herein. The chief purchasing officer, or the technical review team through delegated authority from the chief purchasing officer, will make a recommendation to the EERMC. An award shall be made to the responsible offeror(s) whose proposal is determined to be the most advantageous to the EERMC, taking into consideration price and the evaluation

factors set forth in this solicitation. Offerors will be notified via email confirming that their submission is received. The EERMC is responsible for the final selection of an offeror. The EERMC reserves the right to award one, multiple, or no awards based on the proposals received. Offerors will be notified via email with the date that the EERMC will publicly award the proposal. The EERMC also reserves the right to reissue the RFP at its sole discretion.

3.2. Technical Proposal Evaluation Stage. To advance to the second stage of the evaluation process, which factors in the Cost Proposal and Certifications Component, the offeror must earn a Technical Proposal score of at least 55 (78.5%) out of the maximum 70 technical points. Any proposal with a Technical Proposal score of less than 55 points will not have the Cost Proposal or Certification Components opened nor evaluated, and the proposal will be dropped from further consideration.

3.3. Cost Proposal & Certifications Component Evaluation Stage. Proposals scoring 55 technical points or higher will be evaluated for cost and assigned up to a maximum of 30 points in the cost category. In addition, proposals scoring 55 technical points or higher will be evaluated for participation rates of offerors and subcontractors that are certified as Minority Business Enterprises (MBE), Women Business Enterprises (WBE), Disability Business Enterprises (DBE), Veteran Business Enterprises (VBE), or other similar state and/or federally qualified businesses. Proposals may be assigned up to a maximum of 6 points in the certifications category. The potential maximum score equals 106 points.

3.4. Scoring. Proposals will be reviewed and scored based upon the following criteria:

CRITERIA	POINTS AVAILABLE
Overview and Work Plan	35
Qualifications and Experience	20
Project Management and Organization	15
Total Possible Technical Proposal Points	70
Cost Proposal	30
Certification Component	6
Total Possible Points	106

3.5. Calculation of Cost Points. The offeror with the lowest cost proposal shall receive one hundred percent (100%) of the available points for cost. All other offerors shall be awarded cost points based upon the following formula:

$$(\text{lowest cost proposal} / \text{offeror's cost proposal}) \times \text{available points}$$

For example, if Offeror A has the lowest cost proposal of \$65,000 and Offeror B proposes a cost of \$100,000, Offeror A would get the full 30 points and Offeror B's cost points are calculated as follows: $\$65,000 / \$100,000 \times 30 = 19.5$ points.

3.6. Calculation of Certification Points. See Sections 1.4, 3.3, and 3.7 of this RFP for more information. The proposal with the highest participation rate of offerors and subcontractors that are certified as Minority Business Enterprises (MBE), Women

Business Enterprises (WBE), Disability Business Enterprises (DBE), Veteran Business Enterprises (VBE), or other similar state and/or federally qualified businesses shall receive one hundred percent (100%) of the available points for the Certifications Component. All other offerors shall be awarded points based upon the following formula:

$$(\text{offeror's proposed participation rate} / \text{offeror with highest participation rate}) \times \text{available points}$$

For example, if Offeror A has the highest MBE/WBE/DBE/VBE Certified Business participation rate of 20% and Offeror B proposes a participation rate of 12%, Offeror A would get the full 6 points and Offeror B's cost points are calculated as follows: $12\% / 20\% \times 6 = 3.6$ points.

- 3.7. Calculation of MBE/WBE/DBE/VBE Certified Business Participation Rate.** The participation rate shall be expressed as a percentage and shall be calculated by taking the dollar amount representing work that will be done by the MBE/WBE/DBE/VBE certified offeror, plus the dollar amount representing work that will be done by MBE/WBE/DBE/VBE certified subcontractors, divided by the total contract price. For example, if the certified offeror's total contract price is \$100,000 and will perform \$80,000 of the work itself, and certified subcontractors will perform \$20,000 of the work, the participation rate would be $(\$80,000 + \$20,000) / \$100,000 = 100\%$. If the offeror is not MBE/WBE/DBE/VBE certified, the dollar amount would be \$0. If any subcontractors are not MBE/WBE/DBE/VBE certified, their dollar amounts would be \$0. See Sections 1.4, 3.3, and 3.6 of this RFP for more information.
- 3.8. Interview Presentation.** The chief purchasing officer, or the technical review team may select up to three of the highest scoring, qualified offerors based upon total scores received. These offerors may be interviewed by the chief purchasing officer, or the technical review team, to present their proposals and qualifications over a virtual call, and answer any questions the chief purchasing officer, or the technical review team may have.

SECTION 4: OFFEROR'S SUBMISSIONS

Each offeror must submit a proposal containing the following information. When responding to each section below, please label responses with the corresponding RFP section.

- I. Cover Sheet.** The offeror must complete, execute, and submit the Proposal Cover Sheet which is attached hereto.
- II. Technical Proposal.** An offeror's technical proposal must include the following information:
- A. Overview.** The overview should lay out the offeror's understanding of the scope of work, describe the offeror's proposed project work plan and approach, and explain how the offeror is well suited to achieve the project objectives.

- B. Work Plan.** The offeror should describe its proposed project work plan in detail. Specifically, the workplan must present a proposed timeline of deliverables. The workplan must also provide a description of how the offeror will address all components of the Scope of Work described in Section 5.
- C. Company Profile.** Provide an overview of history, length of time in business, organizational and staff capacity, core competencies, and any other resources uniquely suited to achieving project objectives.
- D. Relevant Experience:** Describe offeror's experience with similar projects.
- E. Examples of Prior Work:** If possible, reference two or three examples of previous projects that best display the offeror's ability and experience with work of a similar nature. Specify the role the offeror played in each project.
- F. Reference Information:** Provide names, email addresses, telephone numbers, and permission to contact two former or current clients for which the offeror has performed work in the last three years.
- G. Identification of Staff and Subcontractors.** List all staff and subcontractors proposed as members of the offeror's team.
- H. Staff Responsibilities.** Specifically describe each of staff and subcontractor duties, responsibilities, and areas of concentration for the project.
- I. Staff Experience.** Please include resumes, curricula vitae, or statements of prior experience and qualification. An organizational chart showing roles and responsibilities on the project is desirable. The team may include subcontractors; however, the lead offeror will be solely responsible for the management and deliverables of the team.
- J. Conflicts of Interests.** Describe any known conflicts of interest between offeror or an affiliate of offeror and any distribution company, or any affiliates of the foregoing. In addition, describe any known conflicts of interest between offeror or an affiliate of offeror and any member of the EERMC.
- K. Litigation.** Describe any litigation, disputes, claims or complaints, or events of default or other failure to satisfy contract obligations, or failure to deliver products, involving offeror or an affiliate of offer, and relating to providing services similar to the services being solicited by the EERMC.
- L. Investigation.** Confirm that offeror, and the directors, employees and agents of offeror and any affiliate of offeror are not currently 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.

III. Cost Proposal. Offerors must separate their cost proposals from their technical proposals and submit as a separate file. Please complete, execute, and submit a cost proposal using the

cost proposal form template attached hereto. Offerors must complete both Task Sheets Page(s) and the All-Inclusive Price Page.

IV. Certifications Component. Offerors must separate their Certifications Component from their Technical and Cost Proposals and submit as a separate file. To be eligible for Certification points, an offeror must complete, execute, and submit the Certifications Component template attached hereto. Offerors must complete both the “Certifications Component & List of Subcontractors” page and “Certifications Component – Participation Rate & Signature” page. Failure to submit a Certifications Component will result in the offeror receiving 0 points in the Certifications scoring category. See Sections 1.4, 3.3, 3.6, and 3.7 of this RFP for additional information.

SECTION 5: PROJECT DESCRIPTION AND SCOPE OF WORK

- 5.1. **Summary:** The EERMC is soliciting proposals from qualified offerors to support the Council's responsibility of providing public education and outreach on energy topics. Specifically, the EERMC is seeking an entity to provide strategic marketing consultation, communication planning, and implementation of a public awareness campaign of energy efficiency's foundational role in addressing climate change and achieving the State's clean energy goals. The Council is seeking professional services for strategic consultation and marketing to foster greater public awareness of energy efficiency programming and solutions, and their role in reducing emissions across the state. The selected offeror will be responsible for developing and implementing a communications strategy to reach the public about the importance of energy efficiency improvements.
- 5.2. **Background and Motivation.** The EERMC is a council authorized, created, and established pursuant to the laws of the State of Rhode Island ("State") to help oversee Rhode Island's energy efficiency programs. One of the EERMC's statutory responsibilities is to "promote public understanding of energy issues and of ways in which energy efficiency, energy conservation, and energy resource diversification and management can be effectuated." The need to address climate change is an urgent matter and the Council has a responsibility to help Rhode Island ratepayers understand how the rapidly evolving energy landscape impacts their lives and how they can benefit from available programs. Through the Act on Climate, the State has set mandatory and enforceable greenhouse gas emissions reduction targets, and energy efficiency improvements play a significant role in achieving those goals. The Council can help raise public awareness of the programs and services available to help reduce environmental impacts and emissions. In particular, the Council seeks to prioritize support for economically disadvantaged communities, which typically bear a greater burden with regard to the costs and impacts of a fossil fuel-based economy.
- 5.3. **Scope of Work:** The primary objective of this RFP is to enable the EERMC to better engage and support Rhode Island ratepayers in making informed energy and environmental choices. The EERMC envisions a multi-phased effort to develop and implement a public awareness campaign with key performance indicators to track success. Phase 1 would encompass tasks related to campaign development, including research and design. Phase 2 would encompass all tasks related to implementation of the campaign. The EERMC reserves the right to solicit a separate RFP for Phase 2 if deemed necessary. Such efforts could include, but may not be limited to the following:

PHASE 1 – RESEARCH & DESIGN:

- Conduct literature review of relevant reports, policy, and resources (e.g., Nonparticipant Market Barriers Study, Act on Climate, etc.)
- Conduct supplemental research if deemed necessary by the EERMC (e.g., focus groups, surveys, interviews, etc.)
- Survey and build on existing efficiency and climate related outreach efforts in Rhode Island (e.g., Rhode Island Energy marketing campaigns)

- Facilitate identification and honing of strategic objectives, target audiences, and key messages
- Conceptualize and design a public awareness campaign, likely including a variety of outreach elements and platforms such as video, web, social media, in-person events, print media, etc.
- Develop engagement goals along with systems and metrics for measuring and tracking engagement

PHASE 2 – IMPLEMENTATION:

- Implement the public awareness campaign developed in Phase 1
- Integrate campaign with existing EERMC public outreach events (i.e., EERMC Annual Public Forum and Energy Lecture Series, Energy Expo at the RI Home Show)
- Utilizing the key performance indicators established in Phase 1, evaluate and report on the reach, impacts, and outcomes of the campaign, including any recommendations for follow-up activities

The selected offeror will be expected to take the lead on project management and ensure key milestones are reached in accordance with the agreed upon timeline. The selected offeror will be expected to work closely with the EERMC, the EERMC's consultant team, and OER for guidance on developing all deliverables. Regular check-in meetings can be used to for planning and brainstorming with the EERMC and OER.

To be responsive to this solicitation, offerors should propose recommended timelines with clear milestones and deliverables for communications tools and an outreach plan with metrics for measuring success. An offeror's workplan must describe who will be responsible for each deliverable/milestone and describe the potential primary audiences for each outreach action. Lastly, reporting metrics to measure success for each action must also be described and incorporated into any proposed workplan. A successful workplan will answer the following questions:

- Does the offeror have **sufficient experience** developing public awareness campaigns, communications tools, and outreach strategies for similar entities and/or under similar circumstances?
- How will the offeror **collaborate with the EERMC and OER** to ensure development of **relevant and effective** messaging, communications tools, and outreach strategies?
- What is the offeror's **approach to implementation** of the proposed outreach campaign considering the Council's limited staff capacity?
- How will the offeror ensure outreach strategies are able to **reach diverse populations** throughout Rhode Island?
- How will the offeror **determine the primary audiences** for outreach strategies?
- How will the offeror **develop metrics** for each outreach strategy?

The EERMC prefers that the offeror has experience and can demonstrate success in reaching target audiences in Rhode Island or New England.

In addition to participation at regularly scheduled Council meetings, a selected offeror will be expected to provide a ~15-20-minute presentation at a public EERMC meeting in 2024 to share the results of the energy efficiency and climate public awareness campaign.

If an offeror identifies a need for additional tasks, the offeror may indicate such additions in the project proposal.

5.4 Required Deliverables

- Updated workplan and timeline based on post-award discussions and direction from the EERMC
- Outreach and engagement strategic plan, including engagement goals and metrics emphasizing equity
- Monthly tracking of implementation efforts
- Public presentation to the EERMC on the outcomes of the public awareness campaign and deliverables
- Monthly invoices, as appropriate

5.5 Expected Tasks and Timeline

Task 1 refers to Phase 1 and Task 2 refers to Phase 2 from Section 5.3.

MILESTONES	ANTICIPATED DATES
Proposal Award	March 2024
Selected Offer to Begin Work	April 2024
Interim Reports	Written updates presented during monthly EERMC Education Committee meetings. Additional updates and check-ins as needed or requested.
Task 1: Develop an energy efficiency and climate public awareness campaign strategy	April – Jun 2024
Task 2: Implement awareness campaign and track progress and KPIs	July – December 2024
Task 3: Final Report & Presentation	December 2024

Proposal Cover Sheet

Offeror's Name:

RFP Information	
Title of RFP:	
RFP Number:	

Offeror Information	
Legal Name of Offeror:	
Type of Entity (i.e., corporation, partnership, sole proprietorship):	
Mailing Address of Primary Place of Business:	
Phone Number:	
Website:	

Contact Person for the Offeror	
Name:	
Title:	
Mailing Address:	
Phone Number:	
Email Address:	

Signature of Authorized Person

Date

Printed Name, Title

Cost Proposal - Task Sheets

Offeror's Name:	
------------------------	--

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

Task 1:			
Labor Costs			
Subcontractor or Team Member Name and/or Job Title	Hourly Rate	Estimated Hours	Evaluated Price (Hourly Rate * Estimated Hours)
Additional expenses that are not included in hourly rate			
Description of Expense		Price	
Total Task Price:		\$ _____	

Cost Proposal - All-Inclusive Price and Signature Page

Offeror's Name:	
------------------------	--

One All-Inclusive Price. This number represents the sum of all total task prices and any other costs and expenses charged to EERMC.

All-Inclusive Price:	\$_____
-----------------------------	---------

Signature of Authorized Person

Date

Printed Name, Title

Certifications Component & List of Subcontractors

Please see Sections 1.4, 1.5, 3.3, 3.6, and 3.7 of this RFP for additional information.

Offerer's Name:		
Is the offeror a certified MBE, WBE, DBE, VBE, or other similar state and/or federally qualified business? (see Section 1.4 for more information)	YES	NO
	If YES, provide the total dollar amount representing work that will be done by the offeror: <div style="text-align: right;">\$ _____</div>	

Identification of Subcontractors (Please add rows as necessary)			
Subcontractor Name	Subcontractor Mailing Address, Email Address, and Phone Number	Is the subcontractor a certified MBE, WBE, DBE, VBE, or other similar state and/or federally qualified business?	Dollar amount representing work that will be done by this subcontractor
			\$ _____
			\$ _____
			\$ _____

Certifications Component – Participation Rate & Signature

Please see Sections 1.4, 1.5, 3.3, 3.6, and 3.7 of this RFP for additional information.

Offeror's Name:	
------------------------	--

A. MBE, WBE, DBE, VBE Certified Offeror - Dollar amount representing work that will be done by the certified offeror (if offeror is not certified, the amount is \$0):	\$ _____
B. MBE, WBE, DBE, VBE Certified Subcontractors - Dollar amount representing work that will be done by certified subcontractors (if no subcontractors are certified, the amount is \$0):	\$ _____
C. Total Cost - All-inclusive price listed in the cost proposal:	\$ _____
Participation Rate of MBE, WBE, DBE, VBE Certified Businesses $(=(A+B)/C)$:	_____ %

Signature of Authorized Person

Date

Printed Name, Title

EXHIBIT B:
Proposal

Proposal Cover Sheet

Offeror's Name:

PivotPath LLC

RFP Information

Title of RFP:

RFP Number:

Offeror Information

Legal Name of Offeror:

PivotPath LLC

Type of Entity (i.e.,
corporation, partnership,
sole proprietorship):

LLC

Mailing Address of
Primary Place of Business:

930 New Hope Rd STE 11-628 Lawrenceville, GA 30045

Phone Number:

404-919-6560

Website:

www.pivotpathdigital.com

Contact Person for the Offeror

Name:

Elizabeth M'balu Oke

Title:

President & CEO

Mailing Address:

930 New Hope Rd STE 11-628 Lawrenceville, GA 30045

Phone Number:

404-919-6560 ext.1

Email Address:

elizabeth@pivotpathdigital.com



Signature of Authorized Person

2/19/2024

Date

Elizabeth M'balu Oke, President and CEO

Printed Name, Title



MEDIA SERVICES

RHODE ISLAND ENERGY
EFFICIENCY AND RESOURCES
MANAGEMENT COUNCIL

Capabilities & Proposed Project Approach



PIVOT·PATH

MARKETING STRATEGISTS AND CREATIVE STORYTELLERS.

Presented by: Elizabeth M'balu Oke, President of PivotPath

Unique Entity Identifier: KGUXM3SGGSV5 U.S: 930 New Hope Rd. STE 11-628 Lawrenceville, GA 30045
EIN: 83-1606825 · elizabeth@pivotpathdigital.com · PivotPathDigital.com · +1 404.919.6560 (office)

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Appendices

- **Appendix A: Detailed Workplan & Timeline of Deliverables**
- **Appendix B: Project Team and Staff Experience**
- **Appendix C: Relevant Experience (Case Studies and Creative Products)**

Letter of Intent - Rhode Island EERMC

Dear Rhode Island EERMC Leadership

February 19, 2023

We are thrilled to re-submit our proposal to provide strategic marketing consultation, communication planning, and implementation of a public awareness campaign. As a leading provider of marketing and advertising services, we are confident that our expertise and dedication will help to promote the Council's mission of helping Rhode Islanders invest in energy efficiency, conservation, and resource management. Our organizational vision centers on raising awareness, inspiring others, and fostering connections with ideas and stories that enhance our collective quality of life.

Our team brings over a decade of experience in digital marketing and public messaging, and we have a deep understanding of energy efficiency and the renewable energy space. We have a proven track record of success in developing and executing comprehensive campaigns that engage audiences and achieve objectives. Moreover, we have New England-based team members and extensive knowledge of the Rhode Island market, which is vital to understanding your target audiences and developing effective campaigns.

Based on our proven track record, PivotPath believes that our experience and expertise in this area make us an excellent fit for this project because:

- We have extensive experience serving mission-centered nonprofit entities
- We will work closely with Council personnel to ensure that our recommendations are culturally and linguistically appropriate and will resonate with the target audience.
- We have completed numerous projects of similar scope, size, and purpose, all within budget and on time. We have partnered with organizations such as the Maryland Clean Energy Center, Illinois Green Alliance, Greenspan, State of Georgia, CDC, and other comparable institutions.
- We are grateful to have collectively been the recipient of over 60 industry awards for strategy, branding, graphic design, research and messaging.
- PivotPath is an independently owned certified 8(a), Minority Business Enterprise (MBE), Disadvantaged Business Enterprise (DBE), and Woman-Owned Small Business (WOSB and EDWOSB) by the Small Business Association. We are also a certified B Corporation.

Pivotpath appreciates the need for flexibility to not only widen the scope of the organization's work but also the need to make provisions for growth in the number of new offerings and participating partners.

Thank you for considering PivotPath for the RI EERMC's vision of developing and implementing strategic marketing, communication, and public awareness. We look forward to the opportunity of working with you and creating a campaign that has meaningful impact on the communities you serve. I have read and acknowledged every page of the RFP.

Elizabeth M'balu Oke and team


Marketing & Communications Consultant
PRESIDENT & CEO, PivotPath

PivotPath: FEIN: 83-1606825; CAGE: 8DG90; DUNS: 036568321; UEI: KGUXM3SGGSV5





Project Overview

PROJECT UNDERSTANDING

The Rhode Island Energy Efficiency and Resources Management Council is seeking professional marketing and communications for a public relations campaign to promote awareness of energy efficiency programs and their benefits. Specifically, the EERMC is seeking an entity to provide strategic marketing consultation, communication planning, and implementation of a public awareness campaign of energy efficiency's foundational role in addressing climate change and achieving the State's clean energy goals. This project requires a partner organization with a full suite of market research, message creation, and dissemination skills, as well as a good understanding of the subject area and the intended audience. A shared commitment to the values of the RI EERMC will support the efficient use of project resources while meeting all objectives.

ASSIGNMENT GOAL & OBJECTIVES

Our understanding of our role is to design, develop and implement a comprehensive communication and marketing plan that will provide on a consistent and sustained basis, messages and materials that will inform, educate, engage and encourage stakeholder involvement in actions and activities needed to achieve energy efficiency, energy conservation, and energy resource diversification and management in RI. The specific end-state objectives are as follows:

1. Define stakeholders
2. Determine stakeholder engagement goals, processes and methods
3. Develop engaging, enduring campaign messaging for public/target group education and awareness raising of renewable energy and its benefits.
4. Define specific and appropriate channels and instruments for communication marketing
5. Define messaging and materials aimed at combating disinformation and stereotypes
6. Develop communication opportunities for dialogue between stakeholders and target groups
7. Convey results in a clear, timely, and strategically useful manner by formulating, tracking, and reporting key metrics and milestones.

STRATEGIC SUMMARY

Our approach to the development and implementation of a comprehensive public education and awareness raising campaign is to sequence key activities so that each step supports success in the following step(s). Close collaboration with the Council and project leadership will be key, as is clear communication of project techniques so they align with goals. We will aim at developing sustained public interest and engagement. We will customized engagement strategies in order to produce the greatest impact by providing information that is most relevant and likely to motivate action. Furthermore, tracking and reporting metrics and milestones will begin on Day 1.





Project Overview

PROPOSED APPROACH

Metrics will be developed starting on Day 1 and used consistently as tools for motivating and reporting progress. As in other aspects of the project, we will develop guiding metrics appropriate to desired outcomes. In particular, reach and impact are both important elements and need to be captured and analyzed.

We consider the challenge of shaping empowering, engaging messaging on vital policy questions to **reach marginalized communities** one of the highest duties of professional communicators. Our approach in this project will expand the sphere of potential program users with culturally sensitive and effective communication tailored to meet audiences where they are.

Our approach to **planning and conducting market research** is aligned with our experience serving public sector and nonprofit entities and is, first and foremost, thoughtful and analytical. Our literature review will identify the most common barriers to updating energy efficiency programs in Rhode Island's demographic and economic makeup, as well as successful approaches to overcoming them. Potential focus groups would seek to triage objections and opportunities into the nearly-persuaded, the open-to-persuasion, and the difficult-to-persuade. Identification and activation of those inclined or neutral toward Council programs would be distinguished from approaches that overcome skepticism.

When **formulating strategic objectives** for this public awareness campaign, we will emphasize the goals as tools to achieve a desired end state. In this case, motivating outcomes include greater uptake of Council programs, improved awareness of energy efficiency and sustainability issues, and supporting Rhode Island's climate change goals with the Council's resources. Our experience promoting and persuading support for development programs both in the US and globally has honed an approach where engaging messaging opens avenues for education as a foundation for spurring action. Strategically, our approach seeks to empower both the communicator (the Council) and the audience (Rhode Islanders).

In implementing this **public awareness campaign**, we will emphasize behavioral change messaging as a core component. Our goal with public campaigns is often to spur action; in Rhode Island, we will use our insights from research and our formulated strategic objectives to reach audiences where they are, overcome barriers to program adoption, build a lasting understanding of program goals, and leave a strengthened public investment in the goals and programs of the Rhode Island Energy Efficiency and Resources Management Council.

Furthermore, we will remain conscious that the Council's needs can change as programs and partnerships evolve. Being founder-led, we take pride in being lean, flexible, and data-driven.



b.

Work Plan for EERMC Public Awareness Campaign

OVERVIEW - A DETAILED WORK PLAN CAN BE FOUND IN APPENDIX A

Phase I | Research *Information Gathering, Background Review, & Campaign Development*

PivotPath will conduct **strategic planning to understand existing attitudes toward energy conservation better**, focusing on skepticism toward solutions under Council programs, and formulate appropriate strategic goals for encouraging public investment in green energy choices.

1. Define stakeholders
2. Establish project metrics and milestones (April 2024)
3. Formulate strategic goals based on approaches to overcoming obstacles (April 2024)
4. Identify obstacles to understanding and adoption of Council programs (April 2024)

PivotPath will **develop a public awareness campaign** aligned with identified strategic goals and integrated with existing EERMC public outreach efforts.

1. Plan program elements in alignment with strategic goals (April and May 2024)
2. Develop all multimedia materials (ads, videos, radio spots, interviews, etc.) for use in the campaign (May - June 2024)

Phase II | Implementation & Reporting *Rollout of Public Awareness Campaign*

PivotPath will implement the public awareness campaign, with particular emphasis on aligning efforts with existing and planned EERMC outreach efforts for maximum impact.

1. Execute campaign-specific media dissemination (June/July 1 - Dec 15, 2024)
2. Incorporate campaign materials into EERMC activities, e.g. Energy Lecture Series (ongoing)
3. Monthly reporting of Advertising, Media and Public Relations efforts and metrics. (ongoing)
4. Collect and present Final Report on program outcomes (Dec 20, 2024)

APPROACH TO SCOPE OF WORK

Our work for Council would be managed through a team-based process that brings together the key experts who would service the account. This typically involves 3-4 members, including leadership, creative, and technical/design skill sets. Regular (weekly and monthly) team calls would provide clarity and momentum. We typically coordinate via secure Zoom meetings supplemented by our project team Calendar. The PivotPath team works on weekdays but will maintain flexibility and responsiveness to any unforeseen needs.





Company Profile

PIVOTPATH

PivotPath is an award-winning global brand marketing & communications agency serving local, state, and federal government, intergovernmental and nonprofit/NGOs. Our core team includes strategic thinkers, marketing experts, and creative visual and written content creators. With offices in the Metropolitan Atlanta area and Freetown, Sierra Leone, we raise consciousness, inspire people, and connect them to ideas and stories to enhance their quality of life. We maintain a close strategic partnership with fellow Georgia-based marketing and creative firm Henderson Shapiro Peck, who bring almost two dozen additional passionate, expert creatives and strategists to our project bandwidth.

We are masters at creating culturally competent, behavioral-change campaigns that serve the unique needs of state-aligned nonprofits. Our team has crafted environmental messaging for the City of Oakland Park, Florida, a tree-planting campaign in Freetown, Sierra Leone, and promoted the great work of Departments of Parks and Recreation in multiple states. We are also contracted by the Maryland Clean Energy Center to provide marketing and communications for residents and partners within the state. Attracting interest in the issues of environmental protection and environmental justice requires a team that understands the complexities of multicultural communities, one that creates compelling campaigns and visual imagery that educate, engage and empower the intended audience. We utilize our expertise to empower local decision and change makers to better serve communities.

With over eight decades of collective strategic marketing and communications experience, we help clients understand and embrace 'Mother Tongue' – the language of the communities they serve. We recognize the significance of creating culturally and linguistically appropriate messages to address diverse communities. We adopt a collaborative and consultative approach in all our projects by closely partnering with our clients to develop successful and focused campaigns. Additionally, our proficiency in media placement and negotiation enables us to ensure that our campaigns have a far-reaching and effective impact on the intended audience.

CORE CAPABILITIES

All aspects of marketing, advertising and communications:

- Graphic Design
- Advertising and Media Campaigns
- Public Relations
- Merchandising and Signage
- Content and Technical Writing
- Project Management
- Video Production
- Strategic Planning
- Digital and Social Media Management
- Branding & Web Development
- Market Research & Public Opinion Surveys
- Media Planning & Buying





Relevant Experience

Terminated Contracts: None

Client Acquisition Last 5 Years:

- **Maryland Clean Energy Center**
- Illinois Green Alliance
- European Union
- Georgia Army National Guard
- State of Georgia - Clayton State University (GA)
- Gwinnett County Government & Gwinnett County Public Schools (GA)
- Fulton County Government (GA)
- City of Atlanta (GA)
- City of Stone Mountain (GA)
- City of Clarkston (GA)
- DeKalb County Board of Health (GA)
- USAID - International Republican Institute
- Handicap International
- World Hope International
- Suffolk County Government (NY)
- City of East Orange (NJ)
- Coherent Logix
- University of NC System
- Shaw Contract
- Toppan Interamerica

View Appendix C for detailed project information.

e.

Examples of Prior Work

YOUR STORY, OUR EXPERTISE

We are professional communicators, marketing experts, and visual storytellers. We bring creativity and passion to every project. Our clients are diverse but our goal is focused: to tell your story in a way that combines your passion with engaging narrative and design that demands attention. Our messaging starts with your mission, and ends with the audience's understanding, interest, and action.

We have tackled issues both global and local, political, social, and economic. No matter the mission, our work aims to educate, engage, and empower both you **and** your audience.



Energy Efficacy & Awareness in Maryland and D.C.



*National Police Recruitment Awareness Campaign
in Atlanta, GA*



Guinness Drinking and Driving Awareness Campaign

The advertisement for EduQuest features a close-up of a baby's face. The text reads: 'A baby's brain is amazing. Babies are born with 100 billion neurons. By age 3, there will be about 1,000 trillion connections between them, shaped by early experiences.' The EduQuest logo is at the bottom right.

Early childhood language learning



*International development investments
by the European Union in East Africa*





Reference Information

Maryland Clean Energy Center

Ref: Sabrina Bachman, Communications Director sbachman@mdcleanenergy.org 301.314.6066

DeKalb County Board of Health

Ref: Tyler Hinson, Project Manager tyler.hinson@dph.ga.gov 404.294.3780

City of East Orange, New Jersey

Ref: Connie Jackson, Public Information Officer connie.jackson@eastorange-nj.gov 973.266.5153, ext. 5339

European Union Delegation to Sierra Leone and DAI Human Dynamics

Ref: N'Fa Kargbo, Cooperation Officer n'fa.kargbo@ec.europa.eu +232.88.136000

Suffolk County, New York

Ref: Mercy Goodnow-Smith, Executive Director mercygoodnowsmith@gmail.com 631.853.6221



Identification of Staff and Subcontractors

A FULL BREAKDOWN CAN BE FOUND IN APPENDIX B

PIVOTPATH

Elizabeth M'balu Oke
Jovonda Howard
Fern Friedberg
Justin Roshak
Luis Castillo
Ali Conteh

HENDERSON SHAPIRO PACK (SUB)

Debbi Shapiro
Seth Gordon
Gerald Gentemann
Jim Lewis
Megan Allister

KEY SUBCONTRACTOR: HENDERSON SHAPIRO PECK

Founded in 1994, Henderson Shapiro Peck (HSP) has served Fortune 500 clients, non-profit organizations, and small to medium size businesses. Its interdisciplinary team, led by founder Debbi Shapiro, is a collaborative, eclectic collection of strategists, project managers, designers, developers and writers. HSP aims to provide clients with an outside resource of marketing professionals to support their ongoing and new marketing initiatives.





Staff Responsibilities

Elizabeth M'balu Oke - Project Manager & Strategic Creative Development

PivotPath President Elizabeth M'Balu Oke will provide strategic leadership and project oversight from planning to the final report. She will ensure all project goals align with desired outcomes and ensure project efforts meet goals. Her experience will be specifically enlisted to bolster public campaign planning and execution to the highest level of efficiency and effectiveness.

Fern Friedberg - Strategic Advertising and Media Consultant

Fern Friedberg, our Strategic Advertising and Media Consultant, will aid in the development of the media plan and oversee the media buying process, leveraging her expertise to secure strategic placements and optimize the project's advertising efforts for maximum impact and reach.

Jovonda Howard - Market Research Project Coordination

Executive Assistant and Project Coordinator Jovonda Howard will ensure efforts are organized and kept on track. Her experience in large-scale media projects will be fully utilized to ensure the public campaign makes best use of all available resources, especially incorporating events held by the EERMC. She will coordinate between Council leadership and the project team.

Justin Roshak - Creative Team

Senior Creative and Technical Writer Justin Roshak will focus on the initial literature review and research efforts, utilizing his journalism experience to ensure a thorough understanding of the media and perception landscape. He will provide supplementary creative efforts through campaign planning and content creation expertise to the final report.

Luis Castillo - Creative Team

Senior Graphic Designer Luis Castillo will plan and create engaging, quality content for print, video, and web applications. His digital media platform management skills will be especially useful during campaign rollout, and in formulating the final report.

Ali Conteh - Market Research & Data Analysis

Ali will assist with the market research collection and analysis that will formulate the basis for the creative campaign development and the implementation.

Subcontractor: Henderson Shapiro Peck - Creative Team

The creative and media marketing teams at Henderson Shapiro Peck will provide significant content creation and strategic dissemination assistance, especially during the planning and implementation stages of the campaign.



i.

Staff Experience can be found in Appedix B

j.

Conflicts of Interest

Neither PivotPath nor Henderson Shapiro Peck are aware if any conflicts of interest that would prevent or interfere with our teams from discharging the full responsibilities of this proposal. We are not aware of any conflicts of interest between either organization and any member of the EERMC.

k.

Litigation & Investigation

PivotPath and its directors, employees and subcontractors are not currently involved in any litigations, disputes, claims or complaints. We have never defaulted on or failed to uphold a contract.

PivotPath and its directors, employees and subcontractors are not currently 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.



appendices

- **Appendix A: Detailed Workplan & Timeline of Deliverables**
- **Appendix B: Project Team and Staff Experience**
- **Appendix C: Relevant Experience (Case Studies and Creative Products)**

appendix a.

Work Plan for EERMC Public Awareness Campaign

DETAILED WORKPLAN & TIMELINE OF DELIVERABLES

Phase 1 – Research & Design:

Task 1: Literature Review, Supplemental Research and Existing Outreach Assessment

- Define stakeholders
- Conduct a comprehensive literature review of relevant reports, policies, and resources, including the Nonparticipant Market Barriers Study and Act on Climate.
- Determine if supplemental research is necessary through methods such as focus groups, surveys, and interviews.
- If needed, conduct additional research to gain insights into target audiences.
- Evaluate and build upon existing efficiency and climate-related outreach efforts in Rhode Island, including Rhode Island Energy marketing campaigns.
- Identify successful elements that can be integrated into the new campaign.
- **Project Timeline: Weeks 1 - 2**
- Responsible Party: Full Project Team

Task 2: Strategic Objectives and Key Messages

- Facilitate sessions to identify and refine strategic objectives, target audiences, and key messages.
- Ensure alignment with EERMC's goals and Rhode Island's energy and environmental priorities.
- **Project Timeline: Weeks 3 - 4**
- Responsible Party: Creative Team (PP Members and HSP)

Task 3: Campaign Conceptualization and Design

- Develop a conceptual framework for the public awareness campaign, incorporating various outreach elements and platforms.
- Design campaign components, including video, web, social media, in-person events, and print media.
- **Project Timeline: Weeks 4 - 6**
- Responsible Party: Creative Team (PP Members and HSP)

Task 4: Media Plan Development

- Develop a media plan including various advertising channels potentially including Digital Out of Home, Paid Search, Social media and other channels based on the strategic plan.
- **Project Timeline: Weeks 5 - 7**
- Responsible Party: Creative Team (PP Members and HSP)



appendix a.

Work Plan for EERMC Public Awareness Campaign

TIMELINE OF DELIVERABLES

Task 5: Engagement Goals and Metrics

- Establish stakeholders and establish engagement goals.
- Define systems and metrics for measuring and tracking engagement.
- Ensure that metrics align with key performance indicators (KPIs) and campaign objectives.
- **Project Timeline: Weeks 6 - 8**
 - **Completed by: (June 2024)**
- Responsible Party: Research Team

Phase 2 – Implementation, Reporting and Evaluation

Task 6: Campaign Implementation

- Execute the public awareness campaign as designed in Phase 1, including all outreach elements and platforms.
- Ensure consistent messaging and branding across all campaign components.
- **Project Timeline: July - Dec 20, 2024**
- Responsible Party: Creative Team

Task 7: Integration with EERMC Events

- Integrate the campaign with existing EERMC public outreach events, such as the Annual Public Forum and Energy Lecture Series.
- Ensure that campaign elements complement and enhance these events.
- **Project Timeline: July - Dec 20, 2024**
- Responsible Party: Project Team

Task 8: Evaluation and Reporting

- Utilizing KPIs established in Phase 1, evaluate and report on the reach, impacts, and outcomes of the campaign.
- Provide recommendations for follow-up activities and adjustments based on campaign performance.
- **Project Timeline: Ongoing**
- Responsible Party: Market Research and Analytics Team

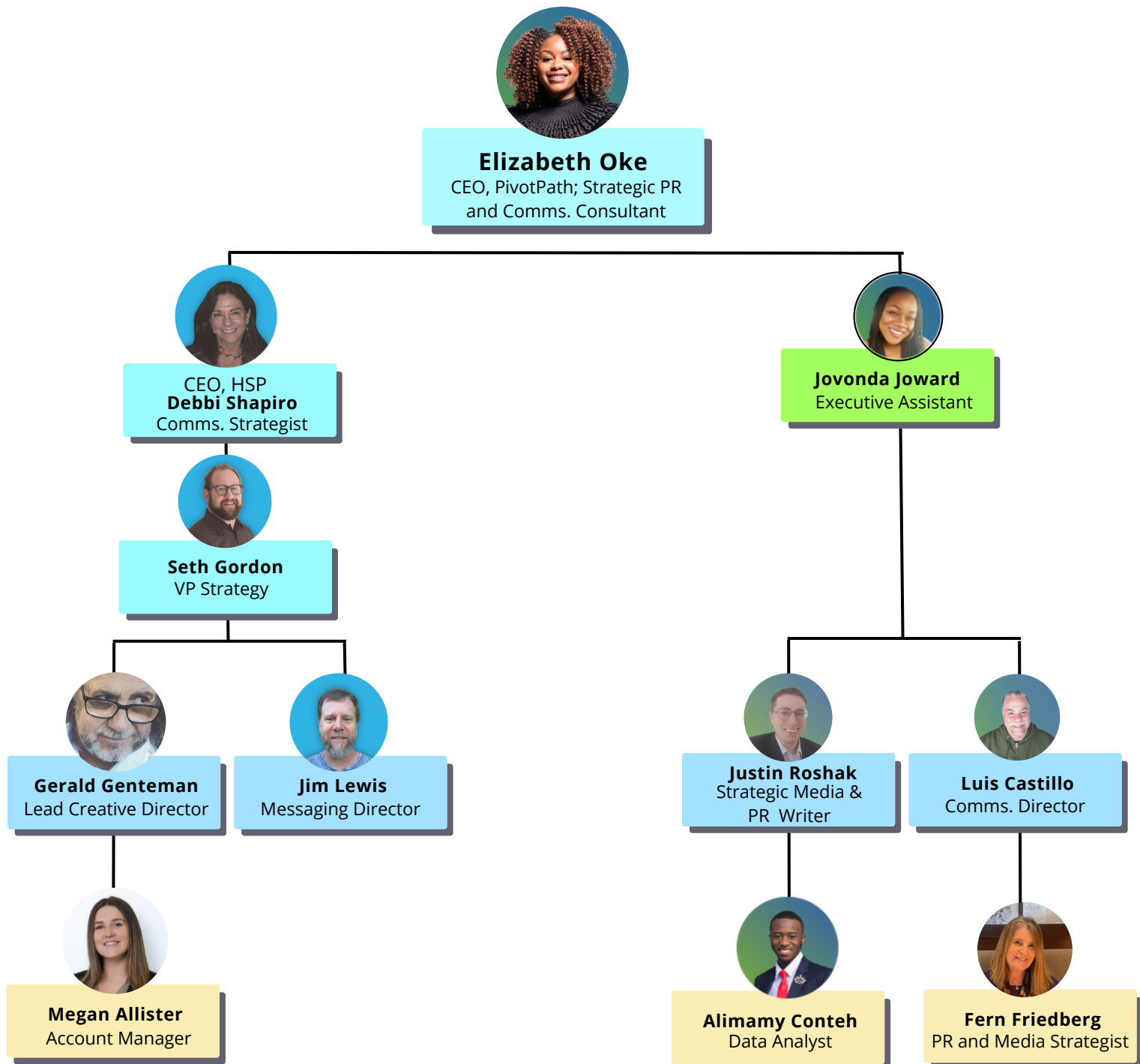
Task 9: Project Management

- Ensure project management throughout both phases, including milestone tracking, timeline adherence, and communication with the EERMC, consultant team, and OER.
- Hold regular check-in meetings for planning and brainstorming.
- **Project Timeline: Ongoing**
- Responsible Party: Elizabeth Oke & Jovonda Howard. Project Coordinator



appendix b.

Identification of Staff and Subcontractors



appendix b.

Staff Experience

Elizabeth M'balu Oke

President & CEO of PivotPath; Strategic Communications Consultant

Elizabeth M'balu Oke is a Strategic Brand Marketing and Communications Consultant with 15+ years of experience in marketing for government, intergovernmental, and nonprofit organizations in North America and West Africa. She has consulted for dozens of nonprofits, NGOs, intergovernmental organizations and government agencies, including major financial institutions.

Elizabeth is passionate about investigating the complexities of growing institutions. She has spearheaded dozens of market research studies and outreach/PR campaigns promoting effective two-way dialogue that leads to stakeholder behavioral change and actionable insights. Elizabeth's enlightened experiences internationally have helped her deeply understand the issues and challenges related to program management, monitoring and evaluation, strategic planning, and communications. She has a B.A. in Economics from Emory University, M.S. in International Policy Management from Kennesaw State University, and Nonprofit Management Certificate from Harvard University. Elizabeth has also received several awards, spoken at national and global conferences and is a member of various professional organizations.

Fern Friedberg

Paid Advertising & Media Placement Expert

Fern has over 20 years experience working in the Advertising industry. She began her career in New York working in agencies such as Campbell Ewald, Y&R, Wells, Rich & Green, and Grey. Her media career includes extensive experience with media research and strategy, partner negotiations and execution and management of global, national and regional accounts. Her expertise is working on both traditional and digital media campaigns for government/military/law enforcement recruitment, non-profits, consumer, and education accounts.

Fern has a strong media strategy/planning/buying experience creating plans that encompass a diverse blend of media channels to optimize branding, enhance awareness, extend reach, maintain frequency and ensure a robust return on investment. Most recently, Fern has managed all media planning, buying, optimizations and reconciling for accounts which include Air National Guard, U.S. Secret Service, U.S. Capitol Police, Atlanta Police and the Veterans Affairs.

Her client portfolio includes: Toefl English Language Test, City of Atlanta Office of Inspector General, DeKalb County Vaccine Awareness, New Jersey SNAP-Ed, USGSA (US General Service Administration), Vanguard, United Healthcare, Capital One, Blue Cross Blue Shield of Tennessee, Petplan, Sony Movies, Dalton State College, Taste of Alpharetta, Cherry Blossom Festival and DC Jazzfest.



appendix b.

Staff Experience

Jovonda Howard

Executive Assistant and Project Coordinator

With eight years of experience supporting c-suite executives and working with non-profits, media agencies, and start-ups, Jovonda excels in project coordination and administration. She has a rich history of community engagement, mobilizing thousands of partners and volunteers for organizations like United Way of Greater Atlanta and the Chick-fil-A Foundation. Jovonda also brings her talents to the television and film production industry, contributing to over 20 projects for networks such as Lifetime, TVONE, Tyler Perry Studios, and BET. Her expertise lies in business organization, project coordination, and task management.

Luis Castillo

Senior Graphic Designer

Luis Castillo is a Graphic Designer with over 20 years of experience in graphic design and visual identity. He is a passionate and inventive creator of innovative marketing strategies and campaigns, accustomed to performing in deadline-driven environments with an emphasis on working within budget requirements. He has worked on innovative, forward-thinking community development campaigns, including real estate, local housing, and sustainable neighborhoods, focusing on long-term community engagement. This experience has fostered the creation of sustainable planning, development, and policy solutions to strengthen social, economic, environmental, and cultural health. Luis has a Bachelor's in Art and Graphic Design Instituto de Diseño de Caracas.

Justin Roshak

Expert Writer, Content Strategist, & Government Storyteller

Justin Roshak is a creative, curious Content Strategist with almost a decade of experience as a researcher and writer. He applies his research, interview, and writing experience to crafting informative and persuasive creative materials. In combining the role of educator and storyteller, his primary work has not diverged much from his days as a community journalist. Justin holds Bachelors degrees in Economics and Government from Dartmouth College.

Ali Conteh

Data Analyst & Researcher

Ali Conteh, a seasoned Data Analyst and Market Researcher with over five years of experience, excels in uncovering insights through Community Assessments and Research primarily in government, intergovernmental, and nonprofit organizations. His unwavering enthusiasm, dedication, and meticulous organization have been key in roles spanning strategic communications, business and organizational development, and project management.



appendix b.

Staff Experience

KEY SUBCONTRACTOR: HENDERSON SHAPIRO PECK

PivotPath is proud to have a close strategic partnership with fellow Georgia-based marketing agency Henderson Shapiro Peck. HSP would handle the bulk of creative work for this project, such as visuals and videos. PivotPath would be responsible for strategy, paid media services, search engine optimization, and some visual design.

Founded in 1994, Henderson Shapiro Peck (HSP) has served Fortune 500 clients, non-profit organizations, and small to medium size businesses. Its interdisciplinary team, led by founder Debbi Shapiro, is a collaborative, eclectic collection of strategists, project managers, designers, developers and writers. HSP aims to provide clients with an outside resource of marketing professionals to support their ongoing and new marketing initiatives.

Debbi Shapiro - President & CEO of Henderson Shapiro Peck

Debbi Shapiro graduated from The University of Tennessee with a Bachelor of Science in Communications and a Biology minor. Debbi served ten years on the American Red Cross Board and ten years on the Arthritis Foundation Board. Additionally, she has mentored many healthcare start-ups and students entering the healthcare marketing industry.

Seth Gordon - V.P of Client Services

With 25 years of expertise, Seth is a marketing strategist and relationship builder at HSP. For over 22 years, he's excelled in onboarding, strategic planning, and client relationship management. Seth emphasizes precise messaging and captivating visuals as key to strategic success. At HSP, he leads staffing, budgeting, and creative operations while spearheading award-winning campaigns across print and digital mediums. HSP has earned accolades in branding, collateral, video, advertising, packaging, and self-promotion categories under his guidance.

Gerald Gentemann - Co-Creative and Strategy Director Henderson Shapiro Peck

Gerald has over 30 years of experience in Creative Advertising and Media. He has led marketing initiatives for numerous global brands, including Johnson and Johnson, Bayer, Sanofi, Merck, and Pfizer, and worked with Johns Hopkins, Georgia Foster Care, and AmeriGroup.

Jim Lewis - Co-Creative and Strategy Director Henderson Shapiro Peck

Jim Lewis provides two decades of design, messaging, and communication experience. His client work ranges from big brands like Toyota, Hyundai, and AT&T to academic brands, including the University of Alabama, where he created the website to recruit graduate students. His award-winning creative includes non-profit organizations such as The American Red Cross, The Boys Scouts, and Habitat of Humanity. Jim graduated from the University of Connecticut with a BFA in graphic design and attended the Creative Circus to enhance his skills.



Promoting a Clean Energy Future in Maryland and Washington D.C.

SITUATION

The Maryland Clean Energy Center (MCEC) is on a mission to drive the clean energy industry forward within the state. With over \$73 million invested in solar production and energy efficiency improvements for various sectors, MCEC embodies values of innovation, sustainability, and commitment in its quest for a cleaner, more affordable energy future. However, navigating the complex landscape of legislative changes, economic shifts, and evolving political priorities while effectively communicating the benefits of clean energy to policymakers and the public posed a significant challenge.

FOCUS & RESULTS

MCEC recognized the need for expert communication to not only promote its own efforts but also convey a compelling vision of a future powered by clean, sustainable energy.

The primary goals included engaging potential partners, nurturing existing stakeholder relationships, and crafting a message that would resonate with a broad audience, all while avoiding the pitfalls of technical jargon. They sought to highlight both the tangible financial benefits and the abstract environmental and principled advantages of clean energy and energy efficiency.

MCEC partnered with PivotPath, a strategic communications agency, to tackle these challenges head-on. The collaborative approach involved several key strategies: marketing and brand strategy, campaign Implementation and program framing.





DON'T TAKE ON MORE THAN YOU CAN BEER

DRINK RESPONSIBLY.
WWW.DRINKIQ.COM 18+



SITUATION

Our team spearheaded an innovative campaign for Guinness focused on responsible drinking. We implemented a creative approach with urinal signage, strategically placing caution messages that transformed as they warmed up. The sequence included two impactful messages before delivering the final powerful statement - "DON'T DRINK AND DIE" when warmed. Complementing this initiative, our team crafted engaging magazine ads featuring bottle caps to reinforce the importance of responsible drinking. Through these efforts, our team successfully conveyed the message of moderation and safety, contributing to Guinness' commitment to promoting responsible alcohol consumption.



BUZZ KILLS



SITUATION

Our team members spearheaded a vibrant campaign for the Florida Department of Transportation, delving into the dynamics of the "Buzzed" feeling and its potential consequences. We crafted a compelling out-of-home experience and designed creative visuals and messaging to illustrate the concept of "Buzz Kills." Through strategic planning and execution, our team successfully conveyed the importance of responsible decision-making when under the influence.



BUZZ KILLS



Educating and Engaging Refugees and Immigrant Communities through COVID-19 Vaccination



SITUATION

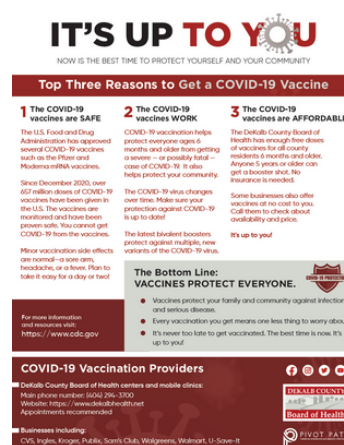
The DeKalb County Board of Health wanted to increase DeKalb County's COVID-19 vaccination awareness and vaccination rate, which was especially low among Black populations in the County.

STRATEGY

Before determining the communication avenue and channel, our team assessed the refugee and immigrant populations in Clarkston to determine personas and segmented audiences. By contacting four community-based organizations serving these populations, we conducted a preliminary assessment of the respective client lists and demographics to determine the four primary refugee and immigrant cultures within DeKalb County: Congolese, Ethiopian, Rwandan, and Sudanese. With decades of experience working with immigrants and refugees in the County, we understand that language is a major barrier to access to healthcare, especially when English isn't the first language. To combat this, we developed animated videos and fact sheets translated into English, French, Arabic, and Swahili to be disseminated on digital and traditional channels.

RESULTS

With the launch of a strategic 38-day geofencing and geotargeting campaign on Facebook and Instagram, the videos reached over 42,000 DeKalb County's Black residents aged 45-65. The printed "It's Up to You!" flyers were provided to community organizations, which reached 60,000+ people in the County.



REFERENCES

Tyler Hinson, Project Manager
tyler.hinson@dph.ga.gov
404.294.3780



Maximizing the visibility of Inclusive, Peaceful and Fair Good Governance in Sierra Leone

SITUATION

Since December 2019, PivotPath has partnered with the European Union (EU) Delegation to Sierra Leone and DAI Human Dynamics to provide full-service market research, communications and visibility services for the EU's three programs: Jobs and Growth, Governance and Civil Society Organization and Local Authority.

STRATEGY

Our team developed a communications plan for the nation, incorporating persona development to target audiences effectively. Actionable insights were used to blend digital, traditional, and social media communications, while internal and community-based assessments helped identify feasibility, receptivity, and areas of opportunity.

Persona development was crucial in our strategy, creating detailed profiles of our target audiences to tailor messaging and channels. Our goal is to ensure audience understanding and appreciation of the EU's role, assets, and offerings, with monitoring and evaluation for sustainability. Persona development helps reinforce a unified image of the EU's interventions in our implementation.

SCAN QR CODES FOR VIDEOS



RESULTS

Our team has strategically developed a plan blended with digital, traditional, and social media communications for the entire nation and has supported the European Union in reaching and engaging over 650,000 Sierra Leoneans through social media, video, newspaper, and website communications.



Strengthening the Recruitment and Force of the Atlanta Police Department

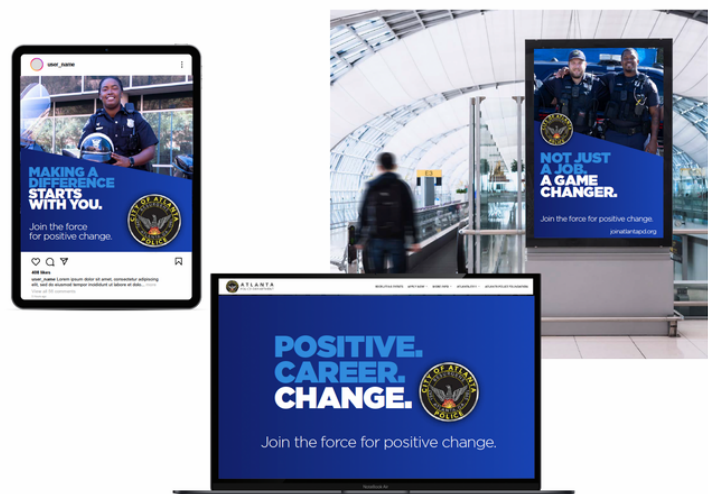
SITUATION

The Atlanta Police Department (APD) aims to attract top talent and uphold high standards in law enforcement. The challenge is inspiring Atlanta and nationwide candidates to pursue a career with APD through digital and traditional (OOH) advertising. At the same time, the APD seeks to become more **prepared for potential crises**.

STRATEGY AND IMPACT

PivotPath and Henderson Shapiro Peck **collaborate on a comprehensive recruitment strategy, including creative design, advertising, proactive crisis communication and image branding.** Beyond the numbers, our strategy emphasizes community engagement, reinforcing the link between law enforcement and local residents. By highlighting the opportunities for personal and professional growth within Atlanta's law enforcement, we've bridged the gap between law enforcement careers and the aspirations of our community.

Our proactive approach has yielded unprecedented success, witnessing a staggering 95% increase in recruitment numbers (applications) within a mere 32 days. This achievement not only tripled previous numbers but redefined the narrative around law enforcement careers in Atlanta.



HEALTHCARE LOGO AND BRANDING EXAMPLES

Here are a series of logos and brand Identities developed by our creative team.



Communicator and Davey Awards



EDUQUEST



Early Learning Companion

A baby's brain is **amazing**.
Babies are born with **100 billion neurons**.
By age 3, there will be about **1,000 trillion connections** between them, shaped by early experiences.

EduQuest



Language Nutrition

Lots of loving words help your child thrive and grow

VIRTUAL OWNERS MANUAL FOR BABIES



Early Learning Companion

EduQuest




Language Nutrition™

Lots of loving words help your child thrive and grow.




Sara, it's not easy to get your baby to stop crying. Here are some techniques to help:
<http://bit.ly/Za5WYd>

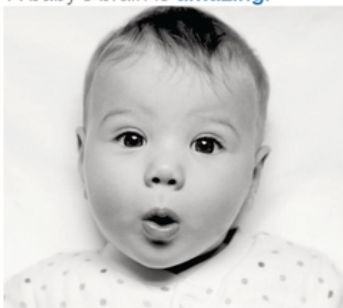
Childhood Health and Well Visit Planner

- Opt-in program based on mother's due date or baby's date of birth
- Designed to engage with new moms, parents and caregivers in learning about best child-rearing practices by delivering educational content focused on early childhood literacy, learning, health and wellness for children ages 0-8 years old.
- Educational text messages with links to resources that deliver deep dives and videos on reading and verbal interaction, parent/child engagement and play, healthcare and overall wellness.
- All messages are appropriate to the age of the child

EduQuest



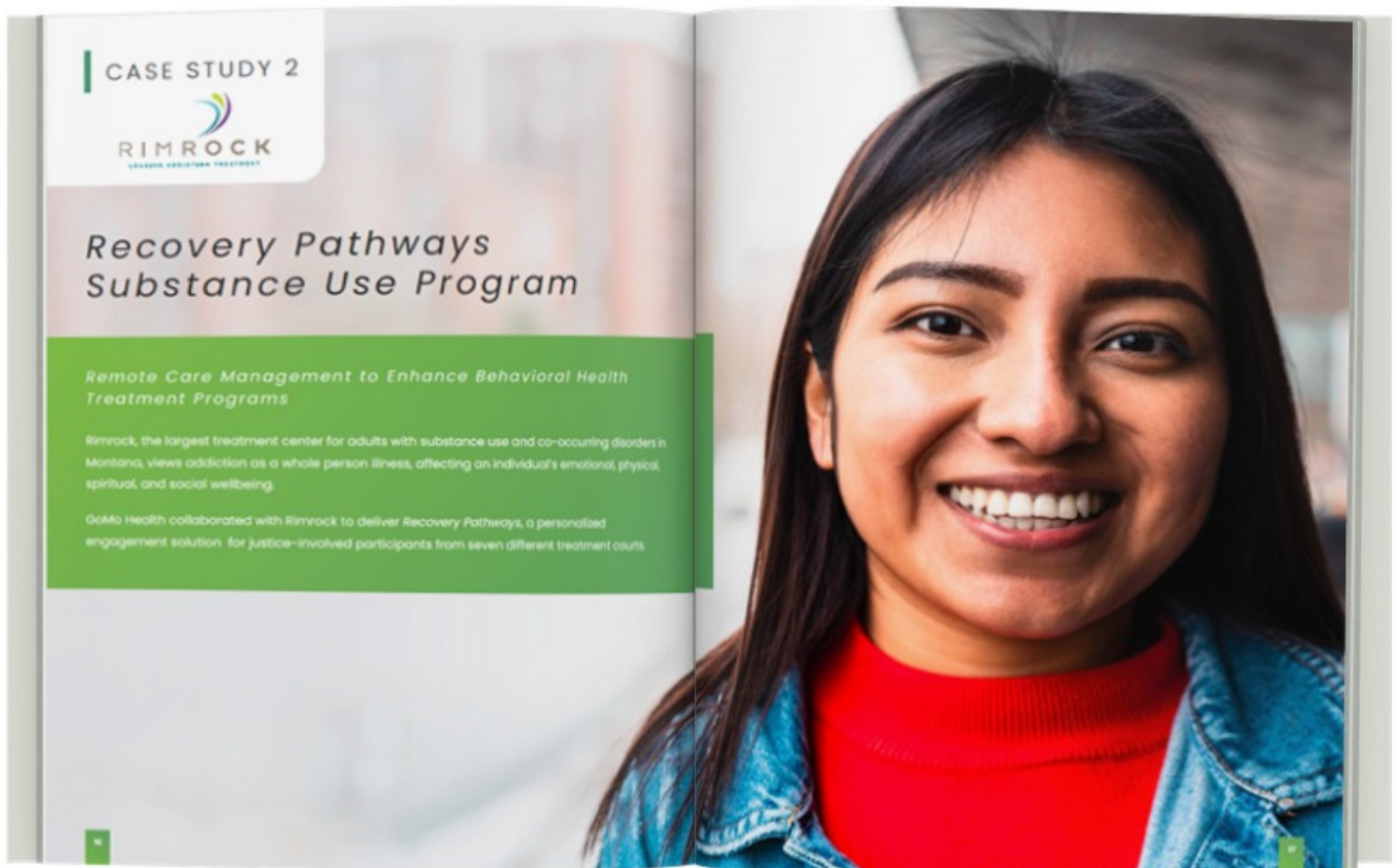
A baby's brain is **amazing**.



Babies are born with **100 billion neurons**.
By age 3, there will be about **1,000 trillion connections** between them, shaped by early experiences.

EduQuest

AMERIGROUP



BINDER



binder
Optometrists



binder
Optometrists



IVERSON



ANYLABTEST NOW



HUDES ENDOSCOPY CENTER

One hour spent
shopping cannot
detect cancer.



Our office can.

One hour of
watching TV cannot
detect cancer.



One hour in our office can.

Visit www.advgastro.com for details and call
(678) 475-1606 today to schedule your colonoscopy.

Hudes
endoscopy
center, LLC



Brian Hudes, M.D. • Dimple Raina, M.D. • Long Nguyen, D.O.
4275 Johns Creek Parkway, Suite A, Suwanee, GA 30024

For details and call
to schedule your colonoscopy.

AdvancedGastroenterology
associates, LLC

Brian Hudes, M.D. • Long Nguyen, D.O.
4275 Johns Creek Parkway, Suite A, Suwanee, GA 30024

ATLANTA GASTROENTEROLOGY

COLONOSCOPY.



A simple thing that can save a life.

Colon cancer is one of the most preventable and treatable cancers when detected early. Screening is recommended beginning at age 50, or earlier if there is a family history or other risk factors.

March is Colon Cancer Awareness Month
www.atlantagastro.com
1.866.GO.TO.AGA (468.6242)



AGA is a participating provider for Medicare, Medicaid and most healthcare plans offered in Georgia.

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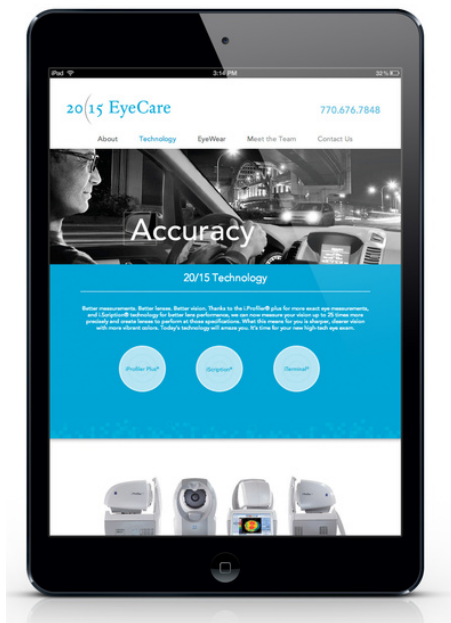
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AGA is a participating provider for Medicare, Medicaid and most healthcare plans offered in Georgia.

2015 EYE CARE



AT&T

AT&T **fiber**



Connect and Give!

**For every new purchase of AT&T Fiber®,
we'll give a laptop to a local family in need**

**[Type in store address
and phone number]**

Ask a sales rep for details.

AT&T Fiber: Limited availability in select areas. Terms and restrictions apply. Select retail locations only. Ends 12/5/22.
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att.com/digitaldivide



Data rates apply.

PRG PD 1122 08807 Ea

CITY OF OAKLAND PARK



CRA FACTS

2001 Shim & Bright Study	2002 Broward County awarded authority to create CRA	2004 City and County Comprehensive Plans amended to designate Local Activity Center (LAC)
2005 CRA Plan Approved	2007 Agreement to participate in County's Redevelopment Capital Program (RCP)	2011 Developed 5 Year Strategic Plan and rebranded LAC area as "Culinary Arts District"
2013 Launched Business Incentives Program and received \$25,000 RCP grant for Oakland Station Plaza and three Main Street Boutiques	2014 Completed Jacob Pastorek Parking Lot with \$200,000 RCP grant	2015 New business Art Park Market Start of Music on Main
2016 Completed Parking Lot South Anthony Retail Center	2017 Phase I of Mobility Plan Completed Revised Downtown Development District (DD) Plan Updated CRA Plan for 2017-2022 Adopted Downtown Transit Mobility Plan Adopted Downtown Mixed Use District Planning Guide	
2018 Adopted Mobility Ordinance Oakland Park Square Purchase & Development Agreements were Approved Community Outreach of Facilities Bond Local Activity Center RCP Renewed 34th Street Parking Lot		



4 FY 2018 | CRA Annual Report



CRA MARKET VALUE

Since 2012, the total market value of all properties in the CRA has increased approximately \$83 MILLION a year.

72% INCREASE
2012 CRA Market Value: \$688,299,730 (lowest point)
2017 CRA Market Value: \$1,044,187,340
2018 CRA Market Value: \$1,186,100,060 (current total)

Residential properties in the CRA are affordable.
\$223,769 | CRA Single Family Properties Only
Average Market Value per Parcel
\$244,291 | Citywide Single Family Properties Only
Average Market Value per Parcel
Source: Broward County Property Appraiser

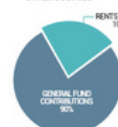


CRA FINANCIALS¹ (FY 2018)

Revenues and Other Sources

Rents & Misc \$73,842
General Fund Contributions \$65,915
Total Revenues \$739,737

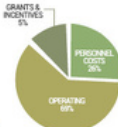
REVENUES & OTHER SOURCES



Expenditures:

Personnel Services \$148,343
Operating \$292,661
Grants and Incentives \$25,403
Total Expenditures \$566,407

EXPENDITURES



¹Non-Tax Incentive Funding (TF) CRA
Part audited financials are available at www.oaklandparkfl.gov

5

CAPITAL PROJECTS

Community Improvement Projects



6 FY 2018 | CRA Annual Report

INFRASTRUCTURE IMPROVEMENTS

- NE 34th Street Parking Lot - Completed
- Andrews Avenue Improvements - Under Construction

Under Design and in Planning Stage

- NE 34th Roadway Improvements
- Oakland Park Elementary Sidewalks
- NE 13th Avenue Bike Path and Sidewalks Connectivity Project
- Prospect Road
- Facilities Upgrade
- Main Street Enhancements
 - Integrated Sound System
 - Public WiFi
 - Public Art Project

WiFi & Audio Coming to Main Street



BUSINESS INCENTIVES

The CRA offers new and existing businesses incentives to aid in their growth and development. These incentives foster job creation and Downtown revitalization.

INCENTIVES INCLUDE

- Facade Improvement
- Relocation Assistance
- Strategic Investment
- Expedited Permitting
- Low Impact Fees
- Merchant Assistance

The CRA is working on creating a new set of guidelines to provide a streamlined application process.

Comments from Local Businesses

"I'm thrilled to have been awarded a \$10,000 grant from the City of Oakland Park for my downtown building. This grant is allowing me to renovate my facade with new awnings, lighting and painting. This does not cover my entire budget for this project but allows me to do more. I can't thank the CRA staff enough for the help as they really made the process smooth. Looking forward to more landlords and businesses to come to this City on the Move."

Oakland Park Resident, Property Owner, Business Owner, and Facade Grant Recipient



7

NEW DEVELOPMENTS

- Oakland Park Square
- G21 Group Fitness Training Facility
- Zen Garden
- Bullegreen Cafe Yard
- Sugar Luxe Society
- Paper Metal Canvas
- The Vanity Blonde
- 50% 60% & 70% Living
- Aloy's Custom Design Luxurious Tailoring
- Peter Olsen Art Studio
- Fat Tap Craft Beer Bar & Eatery
- Hart to Hart Dental
- Little Buddha's Yoga
- Champions World Boxing & Fitness
- AquaChamps Swim School
- Oakland Terrace Townhomes
- URBN Village
- America's Got Baseball



8 FY 2018 | CRA Annual Report

URBAN FARMING INSTITUTE (UFI) Community Gardens

Community garden plots are available at UFI where Master Gardeners and professional growers teach gardening best practices.

Micro Apiary Program

UFI offers classes in urban beekeeping and recently launched the Micro Apiary Program, the first demonstration site and permanently managed apiary in Florida.

School Partnerships

School gardens help demonstrate how food is grown, produced, and consumed.

Farm to Table Demos

The UFI Resource Center offers the opportunity to meet the chef and farmer, learn about interesting ingredients, cooking techniques, and much more.

To learn more, visit www.ufi.us.org

OAKLAND PARK SQUARE



Oakland Park Square is an exciting public-private partnership, between the City and Integra Investment. This proposed development would be the first major mixed-use project in the City's Community Redevelopment Area (CRA), revitalizing the downtown physically and financially.

Residential:

The project features 87 residential apartments and 11 live/work units. The post-modern industrial design of the live/work and loft type units contribute to the personality of the community by attracting new residents to an urban area.

Commercial:

These mixed-use buildings offer 34,690 square feet of prime commercial space on the ground floor. The commercial portion was designed with culinary, convenience, cultural, and experiential tenants in mind to create a new destination center.

City Hall:

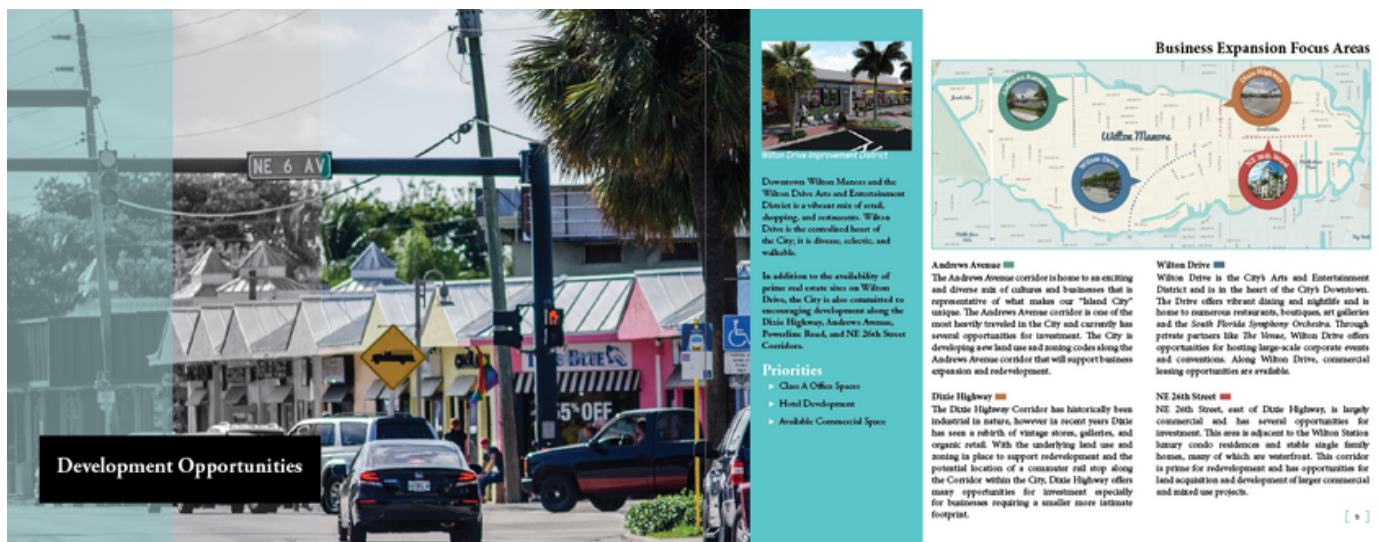
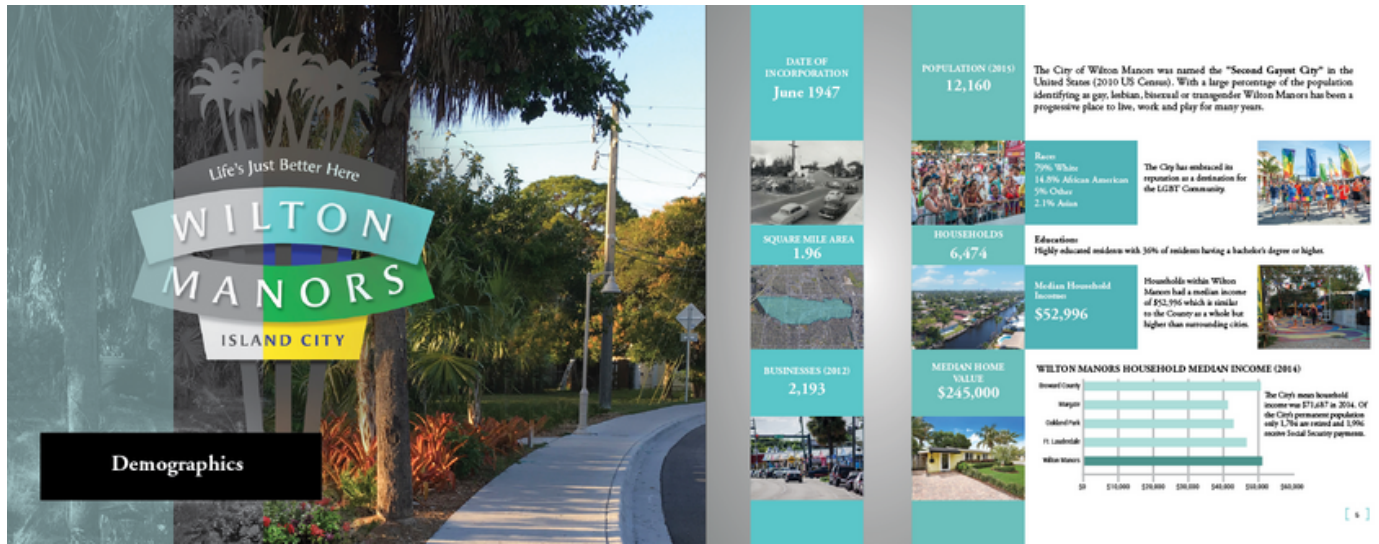
Oakland Park Square features 29,000 square feet dedicated for municipal offices and public space in order to centralize municipal operations. The ground level exposure is designed to engage citizens by providing street level presence throughout location in the heart of the site and prominent signage throughout.

Structured Parking:

This mixed-use project adds 343 parking spaces that will support City Hall, residential, commercial uses, and parking in the downtown.

9

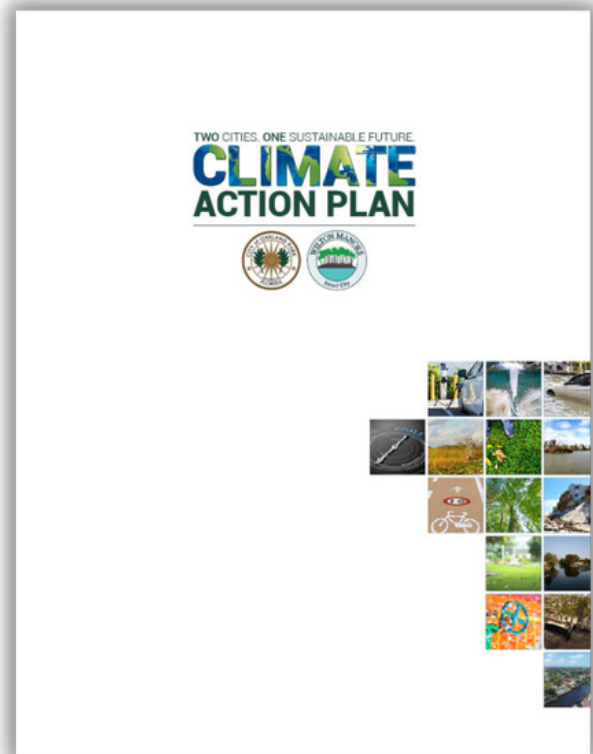
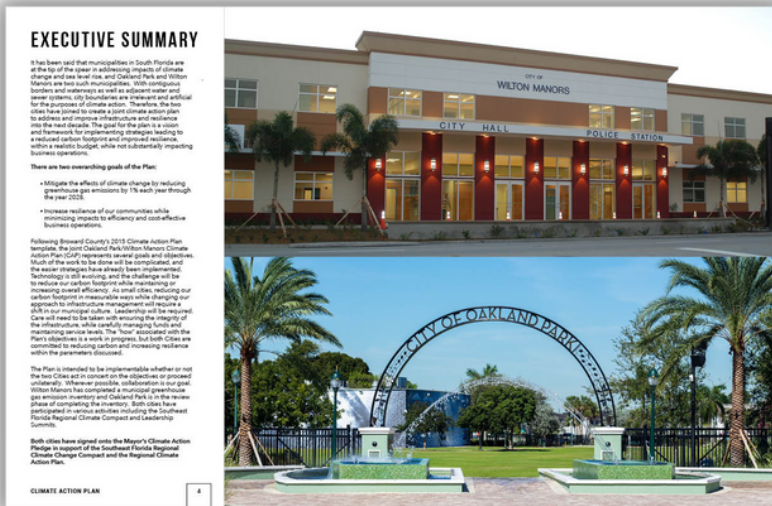
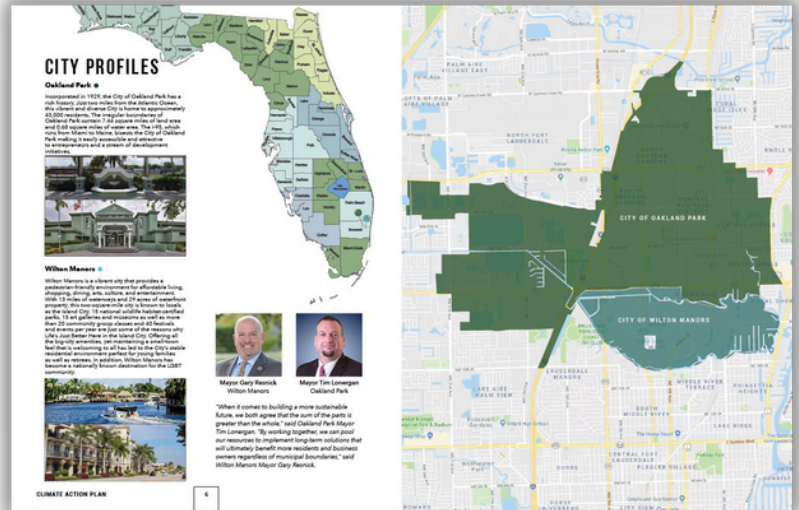
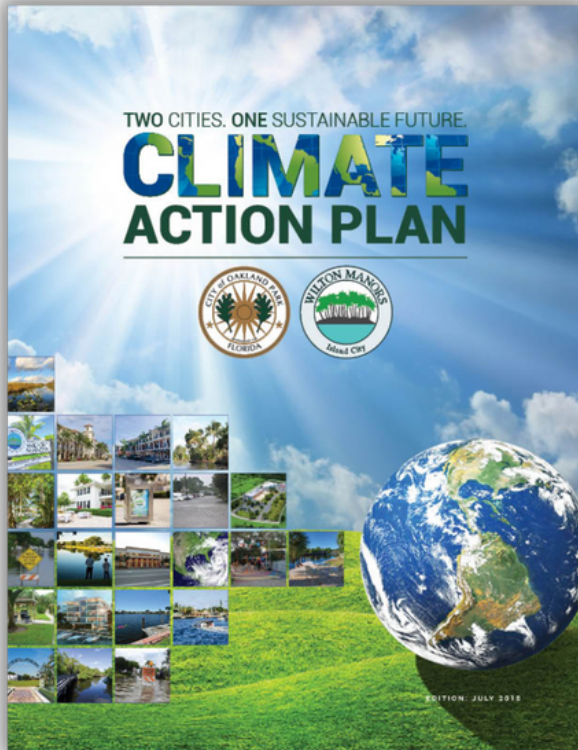
WILTON MANORS ISLAND CITY



CITY OF HOMESTEAD



MUNICIPAL JOINT PROJECT

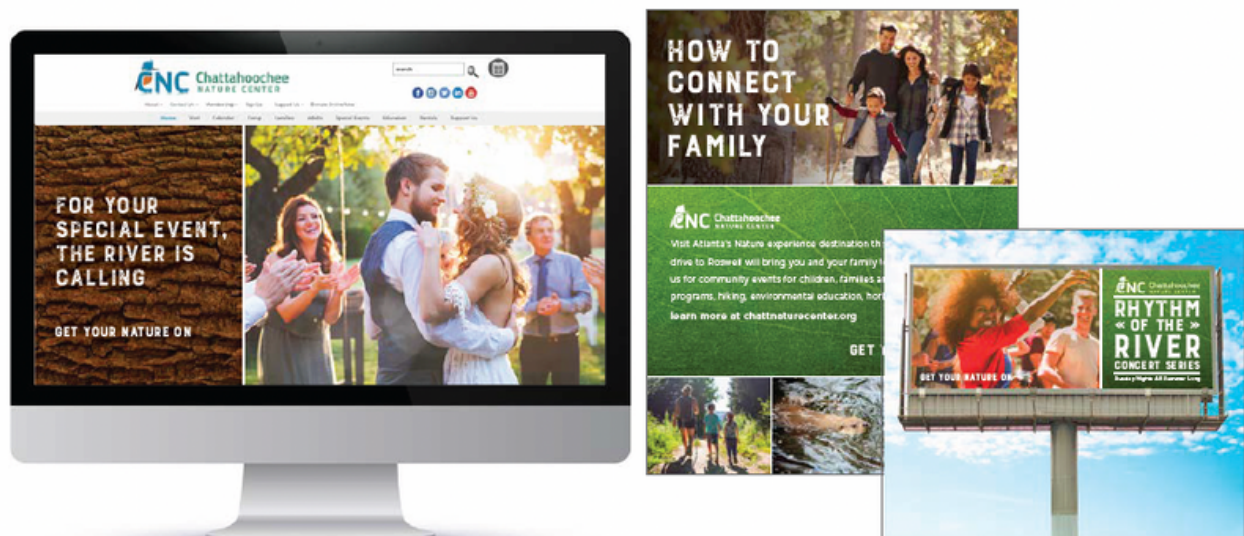


GEORGIA DEPARTMENT OF NATURAL RESOURCES

Presented *campaign* concepts for the Georgia State Parks (*Parks and Recreation*). Participated in a RFP response to promote park visitation, camping, events, etc. HSP was not awarded the solicitation.



CHATTAHOOCHEE NATURE CENTER



CITY OF HOMESTEAD



DOWNTOWN TROLLEY ROUTE

1. Northbound Krome Ave (Historic Museum)
2. Northbound Krome Ave (North of NW 4 St)
3. Northbound Krome Ave (N of Campbell Dr)
4. Northbound Krome Ave (South of NW 11 St)
5. Northbound Krome Ave (Entrance of Center)
6. Front of Mast Academy (1220 NW 1 Ave)
7. Southbound NW 6 Ave (NW 13 Street)
8. NW 6 Ave & NW 9 St (Wittkop Park)
9. Southbound 6 Ave (North of Mowry Drive)
10. W Mowry between NW 8 & 9 Ave
11. Westbound W. Mowry Dr (NW 14 Avenue)
12. W Mowry and SW 16 Avenue
13. Eastbound SW 4 St (SW 17 Ave)
14. Eastbound SW 4 St (SW 16 Ave)
15. Eastbound SW 4 St (SW 11 Ave)
16. Eastbound SW 4 St (SW 9 Ave/Phicol Williams)
17. Eastbound SW 4 St (East of SW 6 Ave)
18. Eastbound SW 4 St (West of SW 2 Ave)
19. Eastbound SW 4 St (West of Krome Ave)



**THE TROLLEY WILL NOT OPERATE
ON THE FOLLOWING HOLIDAYS:**
New Year's Day, Memorial Day, Labor Day,
Thanksgiving Day, and Christmas Day



City of Homestead
650 NE 22 Terrace
Homestead, Florida 33033
(305) 224-4400

Información en Español
305-224-4777

CITY OF HOMESTEAD

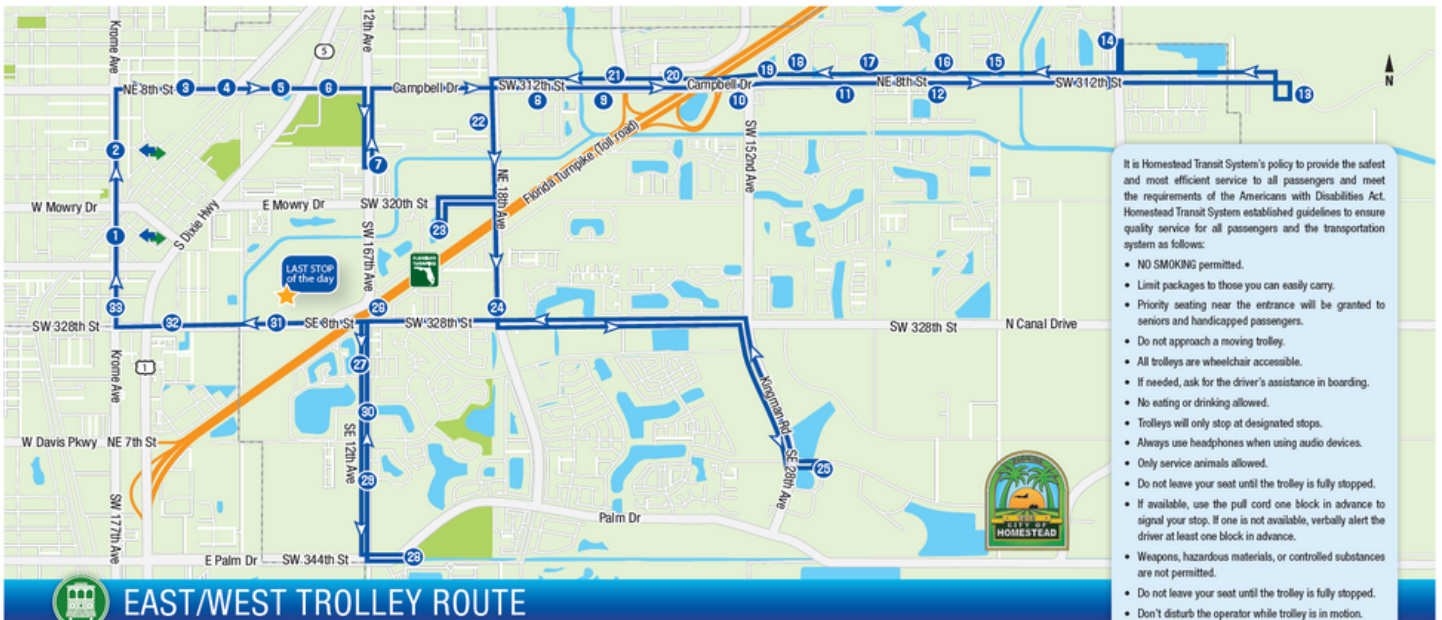
TROLLEY RIDERS' GUIDE



HOURS OF OPERATION

Monday - Friday | 6 AM - 6 PM
Saturday - Sunday | 10 AM - 2 PM

FREE TROLLEY



EAST/WEST TROLLEY ROUTE

1. N-bound Krome Ave (Historic Museum)
2. N-bound Krome Ave (South of NW 4 Street)
3. E-bound Campbell Dr (Post Office/English Ave)
4. E-bound Campbell Dr NE 8 St (W of Parkway)
5. E-bound Campbell Dr (W of US1)
6. YMCA (Bldg's Front Entrance)
7. Cherry Village
8. E-bound Campbell Dr (Lowe's)
9. Flagship Theater (Bldg's Front Entrance)
10. Value Place Hotel (Bldg's Front Entrance)
11. E-bound Campbell Dr (Publix Shopping Center)
12. E-bound Campbell Dr (Crystal Lake)
13. Labor Camp (Administration Office)
14. SW 137 Avenue (Waterstone Community)
15. Waterston Way and Campbell Drive
16. Malibu Way and Campbell Drive
17. W-bound Campbell Dr. (Main Hospital Entrance)
18. W-bound Campbell Dr. (Portofino Professional Bldg)
19. W-bound Campbell Dr. (Hampton Inn)
20. W-bound Campbell Dr. (Sonic)
21. SW 312 St. front of Campbell Dr. Middle School
22. S-bound NE 18 Ave (N of Sunrise Community)
23. Deedoo Gardens (Front Entrance)
24. Corner of SE 18 Ave & SW 328 St (Lucy St)
25. Temp Stop at Temp Police Dept. (Stadium) Entrance
26. W-bound SE 8 St and SW 167 Avenue
27. S-bound SE 12 Avenue (Lakeshore Village)
28. E-bound SW 344 St/Palm Dr (Valencia Gardens)
29. N-bound SE 12 Ave north of Homestead Senior High
30. N-bound SE 12 Ave San Remo Community
31. W-bound SE 8 St and SE 6 Avenue (B.J's)
32. W-bound SE 8 St and US1 (E of Mobile gas station)
33. W-bound SE 8 St and East of Krome Avenue

It is Homestead Transit System's policy to provide the safest and most efficient service to all passengers and meet the requirements of the Americans with Disabilities Act. Homestead Transit System established guidelines to ensure quality service for all passengers and the transportation system as follows:

- NO SMOKING permitted.
- Limit packages to those you can easily carry.
- Priority seating near the entrance will be granted to seniors and handicapped passengers.
- Do not approach a moving trolley.
- All trolleys are wheelchair accessible.
- If needed, ask for the driver's assistance in boarding.
- No eating or drinking allowed.
- Trolleys will only stop at designated stops.
- Always use headphones when using audio devices.
- Only service animals allowed.
- Do not leave your seat until the trolley is fully stopped.
- If available, use the pull cord one block in advance to signal your stop. If one is not available, verbally alert the driver at least one block in advance.
- Weapons, hazardous materials, or controlled substances are not permitted.
- Do not leave your seat until the trolley is fully stopped.
- Don't disturb the operator while trolley is in motion.
- Homestead Transit System is not responsible for articles left on the trolley. Keep personal belongings with you at all times. Should you find an item, hand it to the driver who in turn will forward to City Hall.
- Proper attire, such as shirts and shoes, is required.

If you have any comments, suggestions, or concerns please contact City Hall at (305)-224-4400.

MAP LEGEND



CITY OF HOMESTEAD



DOWNTOWN HOMESTEAD
The Progress Continues



Civic





Entertainment



Tourism



Retail & Dining




Historic DOWNTOWN Homestead

Experience Downtown Homestead

Visit the Seminole Theatre
Eat at Local Restaurants
Tour Old Town Hall Museum

Booming Community

Development Opportunities
Commercial Leasing
Established Customer Market

Explore Two National Parks

Biscayne National Park
Everglades National Park
Fun for All Ages




HOMESTEAD GATEWAY

TO EVERGLADES & BISCAYNE NATIONAL PARKS




 cityofhomestead
www.cityofhomestead.com

Thank you!

Prime Contracting Firm

Principal Officer

PivotPath

Founder/President & CEO:

Elizabeth M'balu Oke;

elizabeth@pivotpathdigital.com

m: 404.391.3528

930 New Hope Rd. Suite 11-628

Lawrenceville, GA

pivotpathdigital.com

o: 404.919.6560

Patrick Beckley

patrick@pivotpathdigital.com

Luis Castillo

luis@pivotpathdigital.com

Justin Roshak

justin@pivotpathdigital.com

Sub-contracting Firm

Henderson Shapiro Peck (HSP)

Founder/President & CEO:

Debbi Shapiro; debshapiro@hendersonshapiro.com

m: 404.680.7910

hendersonshapiro.com



PIVOT·PATH

MARKETING STRATEGISTS AND CREATIVE STORYTELLERS.

WWW.PIVOTPATHDIGITAL.COM



MEDIA SERVICES

RHODE ISLAND ENERGY
EFFICIENCY AND RESOURCES
MANAGEMENT COUNCIL

Cost Proposal



PIVOT·PATH

MARKETING STRATEGISTS AND CREATIVE STORYTELLERS.

Presented by: Elizabeth M'balu Oke, President of PivotPath

Unique Entity Identifier: KGUXM3SGGSV5 U.S: 930 New Hope Rd. STE 11-628 Lawrenceville, GA 30045
EIN: 83-1606825 · elizabeth@pivotpathdigital.com · PivotPathDigital.com · +1 404.919.6560 (office)

Cost Proposal - Task Sheets

Offeror's Name:	PivotPath LLC
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Task Sheets. Please add or delete rows for team members and add or delete task tables as needed.


Task 1: Please see full break down in cost proposal document.			
Labor Costs			
Subcontractor or Team Member Name and/or Job Title	Hourly Rate	Estimated Hours	Evaluated Price (Hourly Rate * Estimated Hours)
Additional expenses that are not included in hourly rate			
Description of Expense		Price	
Total Task Price:		\$ <u>84,500</u>	

Cost Proposal - All-Inclusive Price and Signature Page

Offeror's Name:	PivotPath LLC
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One All-Inclusive Price. This number represents the sum of all total task prices and any other costs and expenses charged to EERMC.

All-Inclusive Price:	\$ <u>84,500</u>
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Signature of Authorized Person

2/19/2024
Date

Elizabeth M'balu Oke, President and CEO

Printed Name, Title

Certifications Component & List of Subcontractors

Please see Sections 1.4, 1.5, 3.3, 3.6, and 3.7 of this RFP for additional information.

Offerer's Name:	PivotPath LLC	
Is the offeror a certified MBE, WBE, DBE, VBE, or other similar state and/or federally qualified business? (see Section 1.4 for more information)	YES	NO
	If YES, provide the total dollar amount representing work that will be done by the offeror: <div style="text-align: right;">\$ <u>60,000</u></div>	

Identification of Subcontractors (Please add rows as necessary)			
Subcontractor Name	Subcontractor Mailing Address, Email Address, and Phone Number	Is the subcontractor a certified MBE, WBE, DBE, VBE, or other similar state and/or federally qualified business?	Dollar amount representing work that will be done by this subcontractor
Henderson Shapiro Inc.	1875 Old Alabama Road Bldg. 900, Suite 910 Roswell, GA 30076; 678.352.7100	WBE	\$ <u>14,500</u>
			\$ _____
			\$ _____

Certifications Component – Participation Rate & Signature

Please see Sections 1.4, 1.5, 3.3, 3.6, and 3.7 of this RFP for additional information.

Offeror's Name:	PivotPath LLC
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A. MBE, WBE, DBE, VBE Certified Offeror - Dollar amount representing work that will be done by the certified offeror (if offeror is not certified, the amount is \$0):	\$ <u>60,000</u>
B. MBE, WBE, DBE, VBE Certified Subcontractors - Dollar amount representing work that will be done by certified subcontractors (if no subcontractors are certified, the amount is \$0):	\$ <u>14,500</u>
C. Total Cost - All-inclusive price listed in the cost proposal:	\$ <u>84,500</u>
Participation Rate of MBE, WBE, DBE, VBE Certified Businesses $(=(A+B)/C)$:	<u>100</u> %



Signature of Authorized Person

2/19/2024

Date

Elizabeth M'balu Oke, President

Printed Name, Title



Cost Proposal

Task/Phase	Description	Budget
Phase 1 – Research & Design		
Task 1: Literature Review, Supplemental Research, and Existing Outreach Assessment	Comprehensive review and assessment	\$1,000
Task 2: Strategic Objectives and Key Messages	Facilitate sessions to identify strategic goals and key messages	\$5,000
Task 3: Campaign Conceptualization and Design	Develop a conceptual framework and design campaign components	\$18,000
Task 4: Media Plan Development	Develop a media plan including various advertising channels	\$5,000
Task 5: Engagement Goals and Metrics	Establish stakeholders and engagement goals with defined metrics	\$1,000
Phase 2 – Implementation, Reporting, and Evaluation		
Task 6: Campaign Implementation*	Execute the public awareness campaign and ensure consistent branding	\$43,000
Task 7: Integration with EERMC Events	Integrate campaign with EERMC public outreach events	\$1,500
Task 8: Evaluation and Reporting	Evaluate and report on the campaign's reach, impacts, and outcomes	\$10,000
Grand Total		\$84,500

Campaign Implementation Costs: \$43,000

<i>Media Buying and Project Management</i>	<i>\$15,000</i>
<i>Advertising Spend</i>	<i>\$28,000</i>



Thank you!

Prime Contracting Firm

Principal Officer

PivotPath

Founder/President & CEO:

Elizabeth M'balu Oke;

elizabeth@pivotpathdigital.com

m: 404.391.3528

930 New Hope Rd. Suite 11-628

Lawrenceville, GA

pivotpathdigital.com

o: 404.919.6560

Jovonda Howard

jovonda@pivotpathdigital.com

Luis Castillo

luis@pivotpathdigital.com

Justin Roshak

justin@pivotpathdigital.com

Sub-contracting Firm

Henderson Shapiro Peck (HSP)

Founder/President & CEO:

Debbi Shapiro; debshapiro@hendersonshapiro.com

m: 404.680.7910

hendersonshapiro.com



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WWW.PIVOTPATHDIGITAL.COM