



REQUEST FOR PROPOSAL

FOR PUBLIC AWARENESS AND EDUCATION CAMPAIGNS FOR FISCAL YEAR 2018 FOR THE NORTH TEXAS MUNICIPAL WATER DISTRICT – NTMWD.COM

INTRODUCTION

North Texas Municipal Water District (NTMWD) is requesting proposals from Social Marketing firms that have extensive and successful experience in providing services for the development and execution of activities resulting in social behavior change with regards to: knowledge of source water; understanding the value of water; water infrastructure, treatment, and delivery; water stewardship; and communicating and focusing on water use efficiency/conservation and the use of irrigation tools, especially WaterMyYard.

BACKGROUND

The NTMWD, a conservation and reclamation district and political subdivision of the state of Texas created in 1951, provides treated water, wastewater, and solid waste service to over 1.6 million citizens living in north Texas. The NTMWD currently serves a 2,200 square-mile service area located in nine counties adjacent to the north and east boundaries of Dallas, Texas, and comprises all of the territory of its 13 Member Cities: Allen, Farmersville, Forney, Frisco, Garland, McKinney, Mesquite, Plano, Princeton, Richardson, Rockwall, Royse City and Wylie.

NTMWD is known as a leader in the State of Texas for its implementation of Water IQ: Know Your Water (Water IQ) www.WaterIQ.org the Texas Water Development Board's recognized water awareness and education campaign. Water IQ has been continuously implemented by NTMWD since 2006.

NTMWD continues to explore and expand its water awareness and education campaigns to provide varied avenues to raise awareness and educate on source water, value of water, water infrastructure, treatment, and delivery, water stewardship, behavior changes for water use/conservation, and increased use of irrigation tools, especially through WaterMyYard.

Information for NTMWD's water awareness and education programs can be found on the NTMWD's website www.NTMWD.com, the North Texas Water IQ website NorthTexasWaterIQ.org website, www.WaterMyYard.org, and the free Water4Otter App available for download on the App Store and Google Play.

NTMWD is also on Facebook and Twitter as well as several other social media platforms.

PROPOSAL SUBMISSION DEADLINE

Proposal must be received by NTMWD by **5:00 p.m. on August 25, 2017** for consideration.

PROPOSAL REQUIREMENTS & ACCEPTANCE CRITERIA

For consideration, proposals are required to include samples from 3 previously implemented, successful social behavior change campaigns. Each sample campaign must include examples of on-the-ground tactics used for public education outreach for both adult and youth audiences. Proposals received without these samples will be rejected, and will not be considered. **Five copies** of your proposal must be received by NTMWD by the deadline date/time.

PROPOSAL SUBMISSIONS

Submission by Hand Delivery, UPS, FEDEX, or courier may be provided by the deadline to:

Denise Hickey
 Water Resource Program and
 Public Education Manager
 North Texas Municipal Water District
 501 East Brown Street
 Wylie, TX 75098

ATTN: Public Education and Outreach RFP

Proposal delivered by U.S. Postal Service (regular or certified mail):

Denise Hickey
 Water Resource Program and
 Public Education Manager
 North Texas Municipal Water District
 P.O. Box 2408
 Wylie, TX 75098

ATTN: Public Education and Outreach RFP

PROPOSAL TIMELINE

Request for proposals posted on NTMWD website..... **August 4, 2017**
 Proposal submission deadline..... **August 25, 2017 at 5:00 pm**
 Proposal review..... **August 28-30, 2017**
 Notification of selection of up to 3 consultants for campaign presentations **September 1, 2017**
 Final decision and notification to consultants **by September 30, 2017**

CONTRACTOR REQUIREMENTS

For use and development of campaign deliverables that include the Water IQ: Know Your Water branded logo, the chosen contractor must complete required usage contract with the Texas Water Development Board and adhere to all brand and reporting standards.

For NTMWD contracts/program agreements in excess \$1,000,000, the chosen contractor is required to complete the Certificate of Interested Parties, Form 1295 from the Texas Ethics Commission.

A notarized copy of the Certificate of Interested Parties, Form 1295 must be submitted to NTMWD prior to conducting work and payment for services rendered on behalf of NTMWD.

TERMS OF CONTRACT

- Fiscal Year 2018 (FY18)
- 1-year contract term, with an option for a 2-year extension, beginning October 1, 2017 and ending September 30, 2018
- Deadline for NTMWD to receive invoices for FY18 is September 30, 2018
- All deliverables must be implemented and completed by September 30, 2018

CAMPAIGN TIMELINE

Campaign planning will begin October 1, 2017 or as soon thereafter that an agreed upon Scope of Work. The chosen contractor will provide a Scope of Work for execution on or before October 6, 2017 with the goal for the fall 2017 paid media can be placed and purchased on or before October 13, 2017.

CONTACT FOR QUESTIONS

Point of contact for questions regarding this RFP or future correspondence:

Denise Hickey
 Water Resource Program and Public Education Manager
 PO Box 2408 | 501 East Brown Street | Wylie, Texas 75098
 P: 972.442.5405 | F: 972.295.6440 | C: 972.670.2711 | Direct: 469.626.4306
dhickey@ntmwd.com

FY 2018 CAMPAIGN GOALS AND OBJECTIVES

GOALS

- Increase WaterMyYard.org signups through close coordination with regional partners from the current 6,175 to 20,000 or more.
- Support water conservation efforts by emphasizing proper seasonal plant selection/landscape and lawn care best management practices provided by WaterUniversity.tamu.edu, subscribing to WaterMyYard.org, and promotion of easy water saving tips at NorthTexasWaterIQ.org
- Incorporate messaging focused on: water rates, value of water, water infrastructure, treatment, and delivery, and North Texas Water IQ
- Raise NTMWD brand awareness through strategic media planning, execution and development of new creative based on research results.
- Increase the conversation of water supply and reuse, water efficiency and conservation, watershed protection, and the value of water through targeted media relations and community engagement.
- Develop water emergency/water resource management tactics if a loss of water source or drought warrants a change in campaign direction during the fiscal year. These strategies should be included as part of the Scope of Work.
- Campaign elements developed will be shared and usable by the NTMWD cities served to further enhance and engage consumers with efficient water practices and behavior changes.

OBJECTIVES

- **WaterMyYard:** Evolve the FY18 creative campaign to drive traffic to the WaterMyYard.org website for signups and messaging through seasonal campaign strategies.
- **Outreach:** Develop the North Texas Water IQ community outreach experience (to compliment seasonal campaign messaging) further integrating digital elements, media relations, and social media for increased WaterMyYard subscriptions, source water knowledge, water efficient tips, and the value of water.
- **Water4Otter:** Enhance the Water4Otter youth education program to increase conversations about water source and efficiency/conservation at home through the addition of an Eagle mascot to both the tour and campaign materials; reintroduce current mascots: Otis the Otter, Farah the Fox, and Bob the Bobcat.

- **Social Media:** Develop a comprehensive social media strategy for appropriate platforms to message WaterMyYard.org through each seasonal campaign, including call to actions, increased branding, and increased traffic to the North Texas Water IQ website and Water4Otter websites.

SERVICES TO BE PERFORMED AND PROPOSAL CONTENT

In order to simplify the evaluation process and obtain maximum comparability, the NTMWD requires that all responses to the RFP be organized in the manner and formatted as described below.

Below are the tactics for achieving the FY18 goals and objectives. In addition the basic information for each tactic, include any additional strategies for implementation of stated campaign tactics and the budget allocation for each tactic.

1. **CREATIVE DEVELOPMENT** – Consultant will outline the proposed FY18 campaign using metrics to accomplish FY18 goals and objectives. New creative will include seasonal messaging in a 3-part campaign: spring, summer, and fall. The campaign may include :15 TV ads, outdoor, social media, radio, print, online/mobile banners and other deliverables, to be determined as to enhance behavior change. Consultant will develop creative assets to align with the media plan. Consultant will consider campaign concepts that may be used outside the FY 18 time frame or that could be easily adapted for a time when water emergency/water resource management (loss of water source or drought) warrants. NTMWD Staff will work with the Consultant on identifying the target audience.

RFP Requirement: Provide 3 samples of previous campaign TV ads developed for social behavior change.

Total estimated cost to produce creative materials: Insert budget allocation for tactic

2. **SOCIAL MEDIA** - Consultant will create a social media strategy and calendar for FY18 to maximize all existing social media channels (Facebook and Twitter at minimum). Consultant will generate strategic and engaging content that will promote NorthTexasWaterIQ, Water4Otter, and WaterMyYard.org. Social media will be consistent with look, feel, and content placement with current NTMWD social media developed. Consultant will develop social media that is shareable content for NTMWD Member Cities and Customer use, and will be engaging to increase the number of followers across all platforms. Consultant will create, monitor, and report metrics, and Return on Investment (ROI) to NTMWD staff on a monthly basis. Social media content may require the updating and refining of content as needed to achieve optimal social media presence. Part of the paid media budget will be allocated for boosting social media posts. NTMWD will be provided the opportunity to assist with drafting, reviewing, and editing messaging prior to finalizing for posting.

Total estimated cost of social media: Insert budget allocation for tactic

3. **INTERACTIVE** - Consultant will update the NorthTexasWaterIQ and Water4Otter websites and the Water4Otter App as needed to include updated information. This will include new creative, seasonal e-newsletters and other timely information relating to the campaign. Consultant will also utilize this portion of the budget to consult on WaterMyYard.org improvements and recommendations, if warranted, to increase subscription base.

Total estimated cost to produce interactive materials: Insert budget allocation for tactic

4. **COMMUNITY OUTREACH / PARTNERSHIPS** - Consultant will conduct community outreach (experiential marketing) to engage NTMWD consumers and stakeholders. Consultant will target residents within the NTMWD service area, with one community outreach event to be held in each Member City (13 in total), or a combination of Member City and Customer events if the Member Cities only events fail to reach a total of 13. The community outreach (experiential marketing) events will incorporate family-friendly interactive and engaging events, activities, and giveaways for adults and youth that relate to overall campaign messages and objectives. These events most often require after-hours and weekend event staffing by the consulting firm. Consultant is responsible for the payment to, training of, and contracting with other parties for this purpose. NTMWD is not responsible for accident, injury, or nonpayment of services rendered to any subcontracted staff. NTMWD will provide Consultant with key messaging and feedback for questions/answers anticipated during the events for training purposes. Consultant will create opportunities for partnerships with various NTMWD stakeholders which could include businesses such as: car washes, restaurants, home improvement retailers and other like entities to further engage the community; and build advocacy for the conversation of water supply and reuse, water efficiency and conservation, watershed protection, and the value of water; and to foster water use behavior change.

RFP Requirement: Provide 3 samples of previous campaign experiential marketing events conducted for social behavior change.

Total estimated cost for community outreach events: Insert budget allocation for tactic

5. **WATER₄OTTER YOUTH OUTREACH** - Consultant will plan, coordinate, staff, and execute a requirement of 10 Water₄Otter school performances in the fall of 2017, and will plan, coordinate, staff, and execute a requirement of 20 Water₄Otter school performances in the spring of 2018. The Water₄Otter school performances will target elementary schools within the 13 NTMWD Member Cities. If needed to complete the required 10-fall and 20-spring Water₄Otter performances, elementary schools within the NTMWD Customer service areas will be included. The Water₄Otter performances will communicate to students important water and environmental tips; calls to action; provide tips on how to save water around their homes; knowledge of source water; watershed protection, wastewater and reuse as it relates to the natural and urban water cycles. The overarching goal of the Water₄Otter performance is to increase the conversation of water within families in the home, and demonstrate to students how to be "Water Spotters" with anticipations that the students will drive conversations about water with adults in their family. Consultant will customize the performance for two different grade levels: K-3rd Grade and 4th-5th Grade, and will add new materials and activities based on feedback from prior events, as well as any revised messaging required. Consultant will revise and reprint the Water₄Otter clings to include any revisions or additions to the Water₄Otter campaign. New or additional materials that can support the performance and increase student participation will be considered, as budget permits. At the end of each Water₄Otter performance, a survey will be provided to students to gauge effectiveness of messaging from performance and use of the Water₄Otter clings. Photos and video footage from performances will be provided for NTMWD use. Consultant is responsible for contacting schools to obtain required permissions for the performances, and all aspects of performance coordination, delivery and follow-up. Consultant is responsible for the payment to, training of, and contracting with other parties for this purpose, and NTMWD is not responsible for accident, injury, or nonpayment of services rendered to any subcontracted staff. Storage for outreach performance items are also the responsibility of the Consultant.

Total estimated cost for youth outreach events: Insert budget allocation for tactic

6. **YOUTH CREATIVE DEVELOPMENT** - Consultant will update the Water4Otter campaign creative that maintains and supports the Water4Otter performance tour. This may include new, updates and cleaning to mascot suits, new collateral/deliverables including print production of clings, signage, props, and other tour materials, as budget permits.

RFP Requirement: Provide a previously developed mascot, or similar, samples from previous campaigns conducted for social behavior change.

Total estimated cost of youth creative development: Insert budget allocation for tactic

7. **MEDIA RELATIONS** - Media relations for FY18 will focus on evergreen efforts such as media updates with online assets and b-roll, as well as on building focused, strategic relationships with area media.

Activities will include:

- Regional press releases/media advisories: To coincide with seasonal watering announcements; secure interviews with local TV, radio, print and online outlets; messaging for spokespeople and tracking coverage.
- Media/Deskside Editorial Tour: Area-wide tour to meet with key journalists to speak about WaterMyYard.org, NorthTexasWaterIQ, Water4Otter, the Value of Water, and any complimentary messaging which reinforces NTMWD as a valued and ongoing resource for the media
- Bylined Articles: Written by Consultant and attributed to a NTMWD spokesperson to be submitted for editorial consideration to target media outlets in the North Texas area
- Blogger Outreach: Target up to 12 locally-based environmental blogs that are tip-oriented and geared toward saving money and improving quality of life
- WFAA "Green Segment": Continue coordination and related activities, pre and post promotion of the WFAA Channel 8, The Green Segment, that is currently a feature segment the third Saturday of each month.

Total cost of media relations: Insert budget allocation for tactic

8. **PAID MEDIA** - During FY18, the paid media buy will focus on placement for two specific seasons: spring and summer. The goal of the two-season placements will achieve a heightened and empowering awareness regarding source water, proper native and adapted plant selections, landscape and lawn care best management practices (WaterUniversity.tamu.edu), and increasing subscription base for use of WaterMyYard.org. Media placements and tactics should be strategic to expand the reach of the defined target audience. A detailed media plan will be presented to NTMWD for approval for both the spring and summer media flights. Media tactics will be reviewed for cost effectiveness and ability to meet stated goals. Consultant to monitor and track performance weekly and throughout the campaign for media tactics, and will recommend amendments to media tactics where applicable for enhanced Return on Investment (ROI), as well as develop a final reporting of all media tactics.

Samples of previous media outlets implemented:

- TV Ads
- Billboards
- Radio
- Online/Digital
- Print Ads
- Sports Arenas
- Mall Ads
- Weather Sponsorships
- Pandora and like media
- Movie Theaters
- Sports (examples: Rangers, Dallas Cowboys, March Madness)

Total paid media: Insert budget allocation for tactic

9. **ACCOUNT PLANNING AND MANAGEMENT** - To ensure Consultant meets established NTMWD's project expectations: Consultant will produce quality products; develop and adhere to mutually agreed-upon timelines and deadlines; monitor campaign expenditures to ensure work efforts remain within approved budget; and maintain open lines of communication through in-person meetings, e-mails, and/or conference calls to address issues, share solutions, and maintain strong relationships for the success of the FY18 campaign. Consultant will be expected to be available to respond to urgent requests.

Account planning focuses on identifying and developing strategies to maximize the effectiveness of all deliverables and messaging.

Deliverables include:

- Development of new strategies for tactics and execution
- Strategic input regarding potential future regional efforts
- Development of a final Scope of Work, including securing vendors and contracts
- Status reports
- Financial reporting (monthly and as needed for changes to the scope)
- Timely monthly invoicing

Account services to include project management for overall campaign process, weekly meetings/conference calls and follow-up, financial management, vendor management, administrative costs, travel and client relations as outlined in the Scope of Work.

RFP Requirement: Provide 3 corporate references that your firm has provided previous services for social behavior change campaigns.

Total account planning and management costs: Insert budget allocation for tactic

10. **FY18 POST CAMPAIGN REVIEW** - Consultant shall plan, coordinate, and execute a campaign review prior to September 30, 2018 with NTMWD. The post campaign review will consist of the contractor developing a comprehensive presentation that includes an overall FY18 campaign review, social media and paid media performance results (ROI/added value/reach of tactics/reach to audience), key highlights from the campaign elements, the Water4Otter campaign, and the percent increase in WaterMyYard subscribers. From results of the FY18 campaign implementation, areas of success, and if areas of deficiencies were identified, contractor will provide strategies, tactics, and concept recommendations for the FY19 campaign.

Total Post campaign review costs: Insert budget allocation for tactic

11. **DROUGHT CONTINGENCY OR WATER EMERGENCY PLANNING** - In the event that NTMWD foresees the need to implement its 2014 Water Resource Management and Emergency Response Plan, Consultant will divert funds from the FY18 budgeted items below in order to provide a comprehensive awareness campaign that can be quickly implemented. This includes:
- **Advertising and media buy:** Consultant may use a previously developed drought TV ad, or modify FY18 TV ads for development of water emergency or drought focused :30 TV spot. A portion of the media buy will be diverted and will be determined at the time the 2014 Water Resource Management and Emergency Response Plan is implemented.
 - **Media relations:** Press releases and related media relations will focus water emergency or drought focused, if necessary. Budget will come from the existing media relations budget. No reallocation will be necessary.
 - **Interactive:** E-newsletters and other timely web information will become water emergency or drought focused, if necessary. Budget will come from the existing budget. No reallocation will be necessary.
 - **NorthTexasWaterIQ Website:** The website will be updated to include water emergency or drought focused information. Budget will come from the existing budget. No reallocation will be necessary.
 - **Social Media:** Consultant will provide content and an editorial calendar for Facebook, Twitter to publicize water emergency or drought. Consultant will also provide social media posts for Facebook and Twitter for utilization for NTMWD Member Cities and Customer use. Budget will come from the existing budget. No reallocation will be necessary.
 - **NorthTexasWaterIQ Outreach:** If outreach events are in progress during the water emergency or drought focused period, outreach staff will be provided with water emergency or drought focused specific messaging to use which would be specific to the event. Budget will come from the existing budget. No reallocation will be necessary.
 - **Paid Media:** If NTMWD were to implement its 2014 Water Resource Management and Emergency Response Plan after the paid media plan has been placed, Consultant will attempt to alter or insert water emergency or drought focused media (previously produced) into the media schedule wherever and whenever possible.
12. **RESEARCH** - Consultant will conduct quantitative research at the completion of the 2017-18 campaign to gauge the campaign's effectiveness in raising awareness of the Water IQ and WaterMyYard brands, and changing behaviors regarding water use. Quantitative research will include phone and/or online surveys, along with a wrap-up report.

Total estimated cost of research: Insert budget allocation for tactic

EVALUATION CRITERIA

Qualifications	25%
Project Experience Social Marketing / Behavior Modification (Work Samples and Recommendations)	45%
Cost Proposal	30%

Creative Development	\$ _____
Social Media	\$ _____
Interactive	\$ _____
Community Outreach / Partnerships	\$ _____
Water4Otter Youth Outreach	\$ _____
Youth Creative Development	\$ _____
Media Relations	\$ _____
Paid Media	\$ _____
Account Planning and Management	\$ _____
FY 18 Post Campaign Review	\$ _____
Drought Contingency or Water Emergency Planning	\$ _____
Research	\$ _____

TOTAL \$