

**CALL NO. 18-1  
FOR PROFESSIONAL SERVICES  
TO BE PROVIDED TO THE  
CITY OF SANTA CLARA, CALIFORNIA  
BY ESSENCE PARTNERS INC.**

The Parties to this Call No. 18-1 ("Call") agree that this Call is made pursuant to the terms of a Call Agreement between the Parties entitled, "Call Agreement by and between the City of Santa Clara, California and Essence Partners, Inc.," dated September 22, 2017, the terms of which are incorporated by this reference. This Call describes the Services to be provided to the City of Santa Clara, California ("City") by Essence Partners, Inc. ("Contractor"), which are more fully described in Contractor's proposal to City entitled "2018-2019 Scope of Work Advertising and Public Relations Services" dated April 2, 2018 ("Proposal"), attached to this Call as Exhibit A and incorporated by this reference. The Services to be performed under this Call shall be completed within the time period beginning on July 1, 2018 and ending on June 30, 2019. The attached Proposal contains a complete description of the Services, and performance dates for the completion of such Services, to be performed by the Contractor under this Call. In no event shall the amount paid to the Contractor for the Services provided to City by the Contractor under this Call, including all fees or pre-approved costs and/or expenses, exceed three hundred five dollars (\$305,000.00), subject to budgetary appropriations.

This Agreement may be executed in counterparts, each of which shall be deemed to be an original, but both of which shall constitute one and the same instrument; and, the Parties agree that signatures on this Agreement, including those transmitted by facsimile, shall be sufficient to bind the Parties.

The Parties acknowledge and accept the terms and conditions of this Call as evidenced by the following signatures of their duly authorized representatives. The Effective Date is the date that the final signatory executes the Call. It is the intent of the Parties that this Call shall become operative on the Effective Date.

**CITY OF SANTA CLARA, CALIFORNIA**  
a chartered California municipal corporation

APPROVED AS TO FORM:

Dated: \_\_\_\_\_

\_\_\_\_\_  
BRIAN DOYLE  
City Attorney

ATTEST:

\_\_\_\_\_  
JENNIFER YAMAGUMA  
Acting City Clerk

\_\_\_\_\_  
DEANNA J. SANTANA  
City Manager  
1500 Warburton Avenue  
Santa Clara, CA 95050  
Telephone: (408) 615-2210  
Fax: (408) 241-6771

"CITY"

**ESSENCE PARTNERS, INC.**  
a New York corporation

Date: \_\_\_\_\_

By: \_\_\_\_\_  
Title: CEO  
Address: 125 Park Ave. 25<sup>th</sup> Floor  
New York, NY 10017  
Telephone: (844) 797-7942 ext.124  
Email: mei@essencepartners.com

# SILICON VALLEY POWER

## 2018-2019 SCOPE OF WORK ADVERTISING AND PUBLIC RELATIONS SERVICES

By Essense Partners  
April 2, 2018

### I. INTRODUCTION

This scope of work covers advertising and public relations services for Silicon Valley Power (SVP) for the 2018 Fiscal Year, from July 1, 2018 to June 30, 2019.

The services that Essense Partners shall perform are outlined below.

### II. PR STRATEGY IMPLEMENTATION & MONITORING

Government entities like Silicon Valley Power have an important relationship with the public and their approach to public relations must strategically reflect that. Now that we have a clear brand strategy approach for SVP, and SVP will soon have limited internal resources on the PR front, Essense Partners will take a greater role in supporting SVP's public relations efforts. Our PR goal for SVP is to help deepen connections with customers and the greater public, to create a balance between proactive and reactive communications, and expand media relations with national, local, and industry outlets.

#### ARTICLE PLAN DEVELOPMENT & IMPLEMENTATION

- Our goal is to place a minimum of one article every 12 weeks; some of these will be the stakeholder-specific PR activities listed in the subsequent sections, while others will be aimed at boosting SVP's profile overall
- We will maintain a schedule of PR topics over time, and proactively build out those stories
- We will select the right media channel and placement type by topic (i.e. paid distribution service vs. social media push vs. traditional news media outreach)
- We will respond to media inquiries and provide proactive communications to media

#### MEDIA METRICS AND MONITORING

- For earned and paid media placements and social media, we will set engagement goals every quarter, and monitor our progress towards those goals.
- We will also conduct media monitoring to identifying opportunities to comment on stories, topics and trends, so that SVP can insert its voice into relevant conversations and providing timely and strategic proposed direction for response.



### PRESS RELEASES, EMERGENCIES AND SVP MEDIA PREP CALLS

- Essense will support the writing and dissemination of SVP press releases, including the drafting of media pitches
- Essense will also provide SVP with prep for media inquiries, and any specific phrases to avoid
- Essense will support emergency communication as needed by SVP

### MEDIA LISTS

- We will continuously review, refine, and update the existing media list for SVP and develop subsets of media lists as necessary (i.e. industry contacts, community groups, etc.), and nurture those relationships on an ongoing basis.

Projected annual professional fees: not to exceed \$27,000

## III. BRAND CAMPAIGNS

Branding is about connecting your customers to your business strategy. It is the steadfast identity that guides all program experiences, outreach efforts and communications touchpoints, so that customers continue to have a meaningful relationship with the organization, even in an evolving marketplace.

In FY 2017, Essense worked with SVP to develop a brand strategy that provides an aligned vision and guides internal staff to serve customers. This refined brand strategy includes positioning, key messaging, visual identity, verbal identity and channel mix strategy. It was utilized to guide the develop of all new collateral and outreach efforts starting in FY 2017.

In FY 2018, Essense will develop brand campaigns that boost brand awareness and align customer perception of SVP with this refined brand strategy. The overall campaign strategy will consist of multiple campaigns that can coexist together, and cover the business areas and stakeholders as outlined in Table 1.

BUSINESS AREA	STAKEHOLDER GROUP
Programs	Business customer
Customer service	Residential customer
Advanced metering	Staff
Fiber optics	The public in general
	Media



Table 1. The business areas and stakeholder groups that the SVP campaigns will target

Essense Partners shall develop each campaign to include the following information:

- Target stakeholder group
- Target business area
- Campaign objective
- Creative execution ideas
- Channel mix
- Duration

Projected annual professional fees: not to exceed \$15,000

#### IV. COLLATERAL AND ADVERTISING DEVELOPMENT

Collateral and advertising development is the most significant work activity for this contract. Work stream IV covers the actual development of channel-specific assets, by customer type. Essense Partners shall perform the following services for each business area and/or stakeholder type:



## RESIDENTIAL CUSTOMERS

SVP residential customers are still largely receiving paper bills, so our scope of services involve servicing the full spectrum of paper-based communications pieces, in addition to expanding more into the digital arena over time. Scope includes, but is not limited to, the following:

### MARCOM ACTIVITY

- Monthly bill inserts (x12)
- Direct mail pieces
- Energy efficiency flyers
- Public benefits brochure
- Ads (x12)
- Inside Santa Clara ads and/or comics
- Infographics
- Videos

### PR ACTIVITY

- Bylined articles and op/ed pieces
- Press releases
- News items
- Social media pieces
- Contributions to Inside Santa Clara
- Blogposts

## BUSINESS CUSTOMERS

Our goal with business customers is to effectively serve their differential needs over time, by creating targeted outreach collateral. Scope of services include, but is not limited to, the following:

### MARCOM ACTIVITY

- Quarterly newsletters for all business customers (x4)
- Public benefits brochure
- Direct mail pieces, by target group
- Case studies



#### PR ACTIVITY

Bylined articles and op/ed pieces

Press releases

News items

#### FIBER OPTIC

Dark fiber leasing is a small but growing and important aspect of SVP's service. As such, Essense anticipates that the scope of services will evolve over time, and an important part of our scope is to find opportunities for promotion. Currently identified scope includes:

#### MARCOM ACTIVITY

Advertising opportunities for dark fiber

#### PR ACTIVITY

Press releases

Case studies

#### WEBSITE

Essense Partners will provide website user experience and content support as part of this scope of work. The scope includes creation of new content on an as-needed basis, and simple rearrangement of existing content to streamline the site experience. Essense will work with the SVP web team to ensure correct uploading of the information.

The scope does not include a website refresh that involves rethinking the front end UX, site development, and a backend content management system integration.

#### INTERNAL COMMUNICATIONS

SVP has staff that is largely field based, and works closely with City Staff and elected officials, all of whom would benefit from greater awareness of SVP efforts. In addition, talent acquisition and retention will also benefit from a greater focus on internal communications.

Essense's scope of work in this area include, but is not limited, to the following:

#### MARCOM ACTIVITY

Infographics

Career spotlight blogposts

#### PR ACTIVITY

Articles for internal City newsletter



#### Articles on SVP at work

All of the above collateral pieces will be delivered in the format agreed upon with the SVP team. We expect that many of these pieces will be disseminated via multiple channels, e.g. print, social media, website, and email.

Projected annual professional fees: not to exceed \$188,000

Projected annual third-party printing costs: not to exceed \$80,000



## V. PROJECT MANAGEMENT

Effective project management is critical for maximizing ROI on advertising and public relations campaigns. Essense Partners shall perform the following services:

### CAMPAIGN IMPLEMENTATION

Essense Partners will handle print coordination, digital and media placement, and public relations, under the guidance of SVP.

### MEDIA TRACKING

[Note: this is now accounted for in the PR budget.] Educational campaigns are most effective when optimized in real-time with audience feedback. Essense Partners shall track social media engagement (views, followers, likes, shares, comments), return on paid social/digital exposures (views, followers, likes, shares, comments, retweets), ROI on print collaterals, and program participation rates. These will be communicated to SVP in a timely manner for each channel, so that campaigns may be updated as we go.

Projected annual professional fees: not to exceed \$57,000

## VI. CONTINGENCIES

5% of professional fees will be set aside for contingencies, which will be handled as they arise during the fiscal year. These may include, but are not limited to, (a) unanticipated marketplace activity that we may want to communicate to customers about; (b) greater than expected support need in a certain category (e.g. website needs a fix); and (c) new internal initiatives that are introduced mid year.

Essense Partners will work with SVP to determine the appropriate times to use contingency funds, or reallocate them back into the main activities, as outlined above.

Projected annual professional fees: not to exceed \$18,000

## VII. BUDGET

### SUMMARY

Overall annual cost: not to exceed \$385,000

Professional fees: not to exceed \$305,000

Third party: not to exceed \$80,000 in printing costs





## BREAKDOWN

Professional fees breakdown by category is as follows.

CATEGORY	BUDGET	% OF TOTAL
PR strategy & monitoring	\$27,000	9%
Brand campaigns	\$15,000	5%
Collateral and advertising	\$188,000	62%
Business	\$59,400	19%
Residential	\$79,200	26%
Dark Fiber	\$9,800	3%
Website	\$19,800	6%
Internal Communications	\$19,800	6%
Project management	\$57,000	19%
Contingency	\$18,000	6%
TOTAL	\$305,000	100%

## RETAINER CONTRACT

Based on the above, the monthly retainer for the 2018/19 year will be set at \$25,416, and this fixed amount will be billed at the end of each month. Production expenses will still be passed through at cost.

The retainer agreement is designed to streamline activities and reduce operational overhead associated with the services that Essense provides. It also ensures that Essense reserves employee bandwidth to support SVP's activities each month, including any emergency communications or last-minute needs.

This retainer agreement covers 100% of the expected deliverables listed in this one-year SOW, even if our actual hours exceed the budget. In the event that the effort required to complete the scope is substantially above what was expected, we will regroup with SVP and discuss appropriate modifications for year 3.