



Request for Applications for Community Based Organization (CBO) Outreach Grant Applications due: March 27th, 2020 at 5:00 p.m.

Please submit your application, supporting materials, and questions to Allison Mannos, Senior Manager of Marketing and Customer Engagement: amannos@cleanpoweralliance.org.

Community Based Organization Outreach Grant Summary

Clean Power Alliance (CPA) is seeking support from organizations that have expertise in community outreach and communications to underserved residents or small business in Los Angeles or Ventura counties to assist us in engaging with our hard to reach customers.

The CPA Community Based Organization Outreach Grant (CBO Grant) offers funding opportunities for CBOs currently serving community members who are also CPA customers (both residents and/or small businesses) to provide education on the benefits of clean energy and financial incentives through new and existing customer programs.

CPA invites any organization specializing in outreach including, but not limited to: non-profits, non-governmental organizations, trade groups, and Chambers of Commerce or other business associations (collectively referred to as “CBOs”) to submit an application for our CBO Grant to conduct outreach to residents and small businesses who are CPA customers in underserved communities (see Targeted Communities section below) in Los Angeles and Ventura counties. The grants offered are up to \$20,000 for work conducted between April 2020 – April 2021. Complete applications must be received via email by March 27th, 2020 at 5:00 p.m.

Background on Clean Power Alliance

CPA believes in a clean energy future that is local, where communities are empowered, and customers are given a choice about the source of their energy. Established in 2017 as a Joint Powers Authority with Los Angeles County, Rolling Hills Estates, and South Pasadena as founding members, CPA is now the Community Choice Aggregation (CCA) provider for 32 jurisdictions across Los Angeles and Ventura Counties. CPA is one of 19 operational CCAs across California, enabled by State Law (AB 117) that passed in 2001. CCAs purchase clean power, and Investor Owned Utilities (which in CPA’s service territory is Southern California Edison, or SCE), continue to deliver that power through existing transmission lines. SCE also continues to handle customer billing and is responsible for resolving any issues with electricity service.

CPA automatically enrolled customers into its CCA service in phases from early 2018 through summer 2019, and we now serve approximately one million business and residential customers. The following communities make up CPA’s territory:

Unincorporated Los Angeles County, unincorporated Ventura County, and the cities of: Agoura Hills, Alhambra, Arcadia, Beverly Hills, Calabasas, Camarillo, Claremont, Carson, Culver City, Downey, Hawaiian Gardens, Hawthorne, Malibu, Manhattan Beach, Moorpark, Ojai, Oxnard, Paramount, Redondo Beach, Rolling Hills Estates, Santa Monica, Sierra Madre, Simi Valley, South Pasadena, Temple City, Thousand Oaks, Ventura, Westlake Village (launches in June 2020), West Hollywood, and Whittier.

CBO Grant Program Goals

CPA invites CBOs to apply for this CBO Grant that will fund educational outreach about CPA to your members, clients, businesses, and other targeted underserved audiences who are also our residential or small business customers. The CBO Grant program is designed to foster collaboration between CPA and trusted local organizations to support CPA as we seek to reach underserved residential and small business customers and achieve the following goals:

1. Enhance understanding of CPA's service, electricity bills, and benefits and increasing enrollment in financial assistance programs
2. Enroll customers in CPA's Power Response programs
3. Enroll customers in CPA's Disadvantaged Communities Green Tariff

Note: Questions and Answers from the prior Request for Applications is available at:

<https://cleanpoweralliance.org/wp-content/uploads/2020/01/CPA-CBO-RFP-QA-2020.pdf>.

Focus Area #1: Increase General Understanding of CPA and Enrollment in Financial Assistance Programs

The first phase of grantees' focus will be to conduct general education and outreach about how CPA works to increase awareness and trust with customers in Disadvantaged Communities (DACs) and underserved populations. Specific topics will include, but are not limited to: explaining what community choice aggregation is and how CPA differs from SCE, dispelling common myths about CCAs, explaining the automatic enrollment process, answering standard billing questions, and directing customers to CPA's full suite of resources and Customer Service Center.

This area of focus will also include information on various financial assistance programs that customers are eligible for, including: the California Alternate Rates for Energy (CARE) program, which offers a 30% bill discount to customers who qualify based on income or participation in other public assistance programs; the Family Electric Rate Assistance (FERA) program, which offers an 18% bill discount to families of 3 or more people who qualify based on income or participation in other public assistance programs; and the Medical Baseline Program, which provides additional energy to a customer's normal baseline allocation if a member of the household needs electrically-powered medical equipment.

Focus Area #2: Enroll Customers in CPA Power Response Programs

CPA Power Response is a collection of distributed energy resource (DER) demand response pilot programs that launched in February 2020. CPA Power Response will give our customers an opportunity to earn incentives and save energy. CPA Power Response involves offering customers certain financial incentives to reduce energy through their existing installed smart technologies at their businesses or homes. CPA Power Response will focus on residential smart thermostats, residential and commercial solar and battery storage systems, and commercial electric vehicle chargers.

Enrolled customers will be asked to participate in “demand response events,” which are power saving events called by CPA during which CPA will ask customers to voluntarily reduce their energy consumption during peak energy times. One of CPA’s priorities is to enroll customers in DACs into CPA Power Response who will receive higher financial incentives for participating. CPA hopes to expand these pilot programs into larger scale programs in the future.

Focus Area #3: Enroll Customers in the Disadvantaged Communities Green Tariff (DAC-GT)

The third area of focus will be educating and encouraging customers to sign up for CPA’s future DAC-GT anticipated to launch in late 2020. The DAC-GT will be contingent on receipt of California Public Utilities Commission (CPUC) funding. The purpose of DAC-GT is to provide access to community solar for residential customers within DACs in CPA’s service territory. Community solar projects consist of small solar farms installed in the community that allow multi-family and other customers unable to normally access rooftop solar to reap the economic benefits of solar. Participants will receive 20% bill discounts.

Targeted Communities

For this RFP, CPA is seeking CBOs that have expertise with reaching underserved residential and small business customers, with a focus on DACs in the communities of Alhambra, Carson, Downey, Hawaiian Gardens, Hawthorne, Oxnard, Paramount, and/or Unincorporated LA County (South LA, East LA, or Hacienda Heights).

Specific targeted customer segments within these communities include:

- Low-income residential
- Seniors
- Small businesses of any kind in these targeted communities
- Residential customers eligible for CARE, FERA, and Medical Baseline discounts
- Residential or small business customers who primarily communicate in a language other than English, including but not limited to Spanish, Mandarin, Cantonese, or Tagalog

CBO Grant Program Eligibility, Funding, and Work Schedule

All CBOs with an established track record of reaching low-income residents and/or small businesses in Los Angeles and Ventura counties are eligible and encouraged to apply. Proposals must focus on reaching customers within the targeted communities listed above to be considered. Grants will be awarded in amounts of up to \$20,000. CPA expects organizations seeking the full \$20,000 amount to reach a minimum of 5,000 households and/or small businesses (this number pertains to overall reach, not necessarily program enrollment). Organizations that do not have capacity to reach 5,000 households and/or small businesses may use this application to apply for grants of smaller amounts proportionate to their outreach capacity, as specified in their application. CPA expects the schedule for work to be completed from April 2020 – April 2021, with a final grant report completed by May 30, 2021. Consulting firms and governmental agencies are not eligible to apply, but government agencies may partner with CBOs on the submission of a grant application.

CBO Grant Program Deliverables

CPA expects that recipients of CBO Grants will include CPA's key message in their existing outreach, communications, services, and programs. Grantees will collaborate with CPA staff to provide messaging to targeted households or small businesses that have been identified in your grant application.

Outreach should include a mix of in-person presentations and conversations at events and digital outreach, including but not limited to door-to-door outreach to residents and businesses, email blasts (based on confirmed click through rates of these communications), documented social media reach, and other creative outreach ideas based on your organization's capacity. In-person outreach methods are required but may be supplemented with other forms of engagement. Grantees are also expected to collect information from customers through quantitative and qualitative surveys.

Grantees will collaborate with CPA to customize messaging, with CPA providing translated and tailored materials for each Focus Area (discussed in the "CBO Grant Program Goals" section), creative content, and speakers as needed. Upon receiving the grant award, CPA will provide three mandatory one-day trainings which will be required for all grantee staff implementing the outreach on: 1) Presenting key messages on CPA's service, customer bills, and CARE/FERA/Medical Baseline financial assistance programs; 2) Presenting key messages on CPA Power Response customer programs; and 3) Presenting key messages on DAC-GT programs.

A. Deliverable: Monthly Report

Grantees will be expected to produce short monthly progress reports with a CPA provided template, a three-month check in call with CPA staff, and a final report and invoice due on May 30, 2021.

Requirements for All Reports

Each monthly report will include:

- Invoice with expenses and administrative costs by line item
- Statistics on how many people were reached through each outreach method
- Customer-reported demographics of people reached based on target populations
- Community feedback on CPA messaging
- Community input on programs
- Lessons learned

B. Deliverable: Three-month progress call

As mentioned above, grantees will be expected to join a three-month progress conference call with CPA staff to discuss successes, challenges, additional support needed, and other topics.

C. Deliverable: Final Report

As discussed above, CPA expects a Final Report by May 30, 2021. The Final Report should include the information required in the monthly reports (including a final invoice) as well as recommendations for how to optimize existing CPA programs' design, provide or suggestions for future CPA programs and/or outreach methods to benefit the target audiences based on feedback you've collected.

The Final Report should also include five high resolution photos of your outreach activities, with signed participant waivers.

CBO Grant Selection Criteria

Grantee organizations will be selected by CPA based on the following criteria:

1. Demonstrated outreach capacity to key community members/customers in the Targeted Communities described above
2. Quality of proposed plan to meet required CBO Grant Deliverables
4. Experience with meeting similar outreach grant deliverables

CPA will give preference for any CBO based in CPA's service territory.

CBO Grant Application Process and Requirements

Interested CBOs must complete a CBO Grant application as specified herein. You must email your completed application as an attached PDF document, along with all other required attachments to Allison Mannos, Senior Manager of Marketing and Customer Engagement, amannos@cleanpoweralliance.org. Questions about the CBO Grant must be submitted via email by March 9th, 2020 to this email address. Responses will be posted online at cleanpoweralliance.org/jobs on March 12th, 2020.

All application materials are due electronically by March 27th, 2020 at 5 P.M. Pacific Time.

Organizations may submit one application per organization for a CBO grant for an amount up to \$20,000. Grants will be paid 50% up front, and 30% upon completion of a three-month progress call with CPA, and the remaining 20% upon CPA's receipt and approval of the Final Report. All grantees will be required to enter into a grant agreement with CPA specifying the terms of the funding.

Applicants must complete a CBO Grant application form with the following information and attachments:

1. The legal name of organization and contact information.
2. Grant amount being requested, expected customer reach by your CBO, and a summary explaining how the amount being requested would meet the expected reach of your CBO's proposal.
3. Your organization's history of and demonstrated capacity to reach and effectively communicate with CPA's Targeted Communities, namely:
 - The communities of Alhambra, Carson, Downey, Hawaiian Gardens, Hawthorne, Oxnard, Paramount, and/or Unincorporated LA County (South LA, East LA, or Hacienda Heights).
 - Low-income residential
 - Seniors
 - Small businesses of any kind in these targeted communities
 - Residential customers eligible for CARE, FERA, and Medical Baseline discounts
 - Residential or small business customers who primarily communicate in a language other than English, including but not limited to Spanish, Mandarin, Cantonese, or Tagalog

In this section, please also provide quantitative measures of your organization's previous outreach capacity for other work your organization has done specifically in our service territory (such as annual attendees at past events and workshops, residents or businesses served, annual caseload, etc.). Specific measures related to our Targeted Communities outlined above are appreciated. Examples of supplemental communications reach (social media, e-newsletters, etc.) are also helpful.

4. Your proposed work plan and timeline to meet required grant deliverables during the time period of April 2020 – April 2021 as follows: Q2 of 2020 for Focus Area #1, Q3 of 2020 for Focus Area #2, and if CPA receives funding, Q4 of 2020 and Q1 of 2021. (See CBO Grant application.) Please include:

- A specific plan detailing your proposed outreach methods, including estimated reach per activity/timeframe. *(Examples include but are not limited to counting numbers of people who will receive information about CPA while visiting an event booth, estimated open rates of email newsletters or social media post interactions, or estimating the number of clients who will receive CPA information during case management, etc.)*

5. A simple budget for implementing your proposed workplan, including staff time, overhead, and direct expenses for your proposal. (See CBO Grant application, budget section.) Grantees should exclude from their budget expenses associated with printed flyers, banners, and other tabling materials for outreach events. Qualified expenses that can be included in the total grant amount can include live translation, event registration costs, food, mileage, and/or childcare, as it relates to conducting CPA related outreach.

6. Your organization's history of meeting similar grant deliverables for other funders.

In addition to the sections described above, you must attach the following MANDATORY components to your CBO Grant Application form for a complete submission:

7. Required Attachments:

- If applying as a non-profit, please provide an IRS 501(c)(3) determination letter, for your organization or your fiscal sponsor, as well as:
 - Your organization's most recent annual financial statement
- If working with a fiscal sponsor, your fiscal sponsor organization will need to provide:
 - A fiscal sponsorship letter taking responsibility for your organization's fiscal administration
 - A letter of request authorizing your organization to apply to CPA for the amount you are requesting
 - The fiscal sponsor's most recent financial statement
- If applying as a Chamber of Commerce/business membership association, please provide an IRS 501(c)(6) determination letter for your organization, as well as:
 - Your organization's most recent annual financial statement
- For all CBOs, a list of 2-3 references for relevant work/projects

8. Optional Attachments (if Available):

- Examples of materials or reports from similar outreach work recently conducted by your organization