

1 *Transcript of Prospective Bidder Webinar*  
2 *for the CPA Consulting Engineer RFP*

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4 The following webinar took place on February 16, 2021 from 2:00 PM – 3:00 PM.

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6 **CHRIS STEPHENS:** Welcome everyone to the Clean Power Alliance of Southern California  
7 (“CPA”) webinar for the Residential Time of Use (“TOU”) Assistive Technology Pilot and Study  
8 Task Order (“Task Order”). We are glad to have folks on the line and we appreciate your interest  
9 and participation in this webinar today. We want to make sure that this is a helpful experience for  
10 each of you as you prepare your responses for the Task Order.

11  
12 Before we dive into the presentation, we are going to walk through some housekeeping, introduce  
13 the CPA team here on the call today, and also give you some time at the end of the presentation to  
14 ask us any questions.

15  
16 First, I'd like to remind everyone attending today's webinar that this is a listen-only webinar until  
17 the Q&A portion has opened. Please ensure that your phones are muted. The same goes for your  
18 webcam or video. Please ensure those are turned off.

19  
20 All questions received during the webinar must be sent to the organizer in the chat window.

21  
22 To access the chat window, locate the Zoom Dashboard on your desktop. There are a few  
23 dropdowns in the Zoom list such as Webcam, Audio, and Dashboard. Click “More.” All the way  
24 at the top of this list is "Chat." If the chat window is minimized, please click the little arrow to the  
25 left of the word "Chat" so that the chat box is available for typing in your questions.

1 I will take note of your questions and we will field them during the webinar.

2

3 If you don't feel comfortable asking questions here at the webinar, you can always send us an email  
4 with your questions to [contracting@cleanpoweralliance.org](mailto:contracting@cleanpoweralliance.org) with a copy to  
5 [taguirre@cleanpoweralliance.org](mailto:taguirre@cleanpoweralliance.org).

6

7 Okay, let's move onto introductions. There are three CPA staff members on the line today. My  
8 name is Christopher Stephens. I am the non-energy contracting manager at CPA. Can the other  
9 CPA staff on this call please introduce themselves?

10

11 **TYLER AGUIRRE:** This is Tyler Aguirre and I am CPA's Customer Programs Manager. I'll be  
12 the point of contact on this solicitation as well as the point of contact on the implementation of this  
13 program.

14

15 **JACK CLARK:** I am Jack Clark, CPA's Director of Customer Programs.

16

17 **CHRIS STEPHENS:** Great. Now I am going to turn it over to Tyler to talk about the CPA's  
18 background and more about this task order.

19

20 **TYLER AGUIRRE:** CPA is a Community Choice Aggregation ("CCA") program, established  
21 as a Joint Powers Authority made up of 32 local agencies across Los Angeles and Ventura  
22 Counties. We were formed in 2017, and we began offering retail electric service in February 2018  
23 in a phased rollout that lasted until 2019. Today, we are the 5<sup>th</sup> largest LSE in California and the  
24 largest CCA in the nation.

25

26 CPA competes with Southern California Edison Company ("SCE") as well as Direct Access  
27 energy providers for retail customers within CPA territory. CPA's customers remain SCE  
28 customers for transmission and distributions services.

1 Next, we wanted to share a visual slide showing CPA’s service territory. You can see the  
2 geographic layout of our member agencies across the Los Angeles and Ventura Counties and  
3 notice that they are not geographically contiguous, but encompass a good portion of those counties.  
4

5 Next, we are going to provide background specific to this project. The California Public Utilities  
6 Commission (“CPUC”) has directed all California Investor-Owned Utilities (“IOUs”) to default  
7 all residential customers that are eligible to TOU rates by 2022 and CCAs have the discretion to  
8 determine whether or not they also want to default their customers to TOU rates. CPA’s Board of  
9 Directors has instructed Staff with defaulting its residential customers to TOU rates. That is going  
10 to occur in 2022. Customers do have the ability to opt-out and return to flat tiered rates.  
11

12 CPA is conducting this pilot ahead of the mass default in order to conduct a study on the potential  
13 for assistive technologies to improve customer awareness of TOU as well as improve our  
14 customer’s ability to adapt and respond to TOU pricing.  
15

16 CPA is interested in helping customers respond to and opt-in or remain to TOU rates. TOU rates  
17 can help customers save money if they adapt to price signals. Customer engagement in TOU rates  
18 can reduce the amount of high-priced energy that CPA has to purchase in the wholesale market.  
19 Relatedly, customer adaptation to price signals can also reduce the amount of GHG emissions  
20 associated with “peaker” energy generation to meet periods of high energy demand. CPA is also  
21 particularly interested in supporting customers that are more vulnerable to TOU-related bill  
22 increases. The transition to TOU represents a pretty significant shift in the way customers think  
23 about their energy consumption and they way they pay for it. SO, there are certain sub-populations  
24 (CARE customers, Customers living in hot climate zones, extreme non-benefiters) that might be  
25 particularly vulnerable to TOU billing increases that we are interest in providing support for.  
26

27 For this particular task order, CPA is seeking proposals from our Prequalified Providers (“PQP”)  
28 to design and study a pilot program that would commence in June 2021. This pilot is intended to

1 evaluate the ability of these assistive learning technologies to help residential customers migrating  
2 to TOU rates successfully respond to Summer on-peak pricing. CPA is running a concurrent  
3 solicitation for Assistive Technology providers that will be implemented in the pilot. Please  
4 review that RFP for more information of the types of enabling or emerging technologies that CPA  
5 is looking to include in the pilot.

6

7 The development of the pilot and an accompanying study will be a collaborative process between  
8 CPA Staff, the selected PQP provider for this task order, and the selected Assistive Technology  
9 provider(s). The selected PQP provider for this task order will not be eligible to bid in the  
10 Technology provider solicitation.

11

12 The high-level overview of task #1 is the TOU Pilot Implementation Plan & the Pilot Metrics. So  
13 tasks include, review of customer recruitment strategy, outreach plan, and customer messaging,  
14 development of the implementation plan, & development of pilot metrics. The high-level  
15 overview of task #2 deliverable is related to the implementation of the pilot. Tasks here may  
16 include assigning program participants to study groups (high touch/low touch), establishment of  
17 control group, load data analysis of program participants, & monthly monitoring of program  
18 participant usage data. The high-level overview of task #3 would be data gathering and reporting  
19 of the study and the survey results. Tasks include the administration of customer surveys &  
20 customer consumption analysis. The high-level overview of task #4 is a final report and  
21 recommendation. Tasks include the preparation of summary report, the preparation of  
22 recommendations regarding implementation of pilot at scale, & potential attendance at CPA Jan  
23 2022 Board meeting where we anticipate presenting the results.

24

25 Please see Task Order, Section IV (“Task List”) for more information.

26

27 We anticipate the task order work to begin March 12, 2021. All task order work will be completed  
28 by March 12, 2022.

1 Now I am going to hand it back to Chris Stephens who will talk through the more procedural  
2 components of the task order.

3

4 **CHRIS STEPHENS:** Thank you, Tyler. The information contained on the next few slides is taken  
5 directly from the task order. So, I'm not going to go over everything on these slides.

6

7 I do want to touch upon some of the more important details for potential proposers to consider  
8 when preparing their submittals. The Task Order has a set-schedule. All questions regarding this  
9 task order are due by 4PM (pacific time) on February 19, 2021, in writing, to  
10 [contracting@cleanpoweralliance.org](mailto:contracting@cleanpoweralliance.org) with a copy to [taguirre@cleanpoweralliance.org](mailto:taguirre@cleanpoweralliance.org).

11

12 Please note that if it is discovered that a Bidder contacts or receives information from any CPA  
13 personnel, board director or alternate outside of the Q&A process defined in the task order, then  
14 CPA may, in its sole determination, disqualify such bidder's submittal from further consideration.

15

16 Proposals should be submitted by 4PM on February 26, 2021, to  
17 [contracting@cleanpoweralliance.org](mailto:contracting@cleanpoweralliance.org) with a copy to [taguirre@cleanpoweralliance.org](mailto:taguirre@cleanpoweralliance.org). The  
18 subject line of the submittal should be "Task Order Submittal for Residential TOU Assistive  
19 Technology Pilot and Study."

20

21 Please be sure to include in your submissions the following components:

22 (i) An overall approach to addressing all of the deliverables in Section IV (Task List).

23 (ii) A detailed project schedule and the relevant project milestones.

24 (iii) A detailed workplan for completing the deliverables

25 (iv) A list of subconsultants, if applicable, by roles and tasks.

26 (v) Examples of similar project work and processes.

27 (vi) Project costs, including a list of personnel and their individual rates.

28 (vii) A completed & signed Vendor Campaign Contribution Form (See Exhibit D5).

1 (viii) A completed & signed CPA Public Records Act Letter Agreement (See Exhibit D6).

2

3 Now is the time where we will move onto Questions. If any interested bidders have questions for  
4 us, then please feel free to send us those questions now.

5

6 (brief pause)

7

8 **CHRIS STEPHENS:** So, we have received a few questions. Here is the first question set from  
9 one of our potential proposers.

10

11 **QUESTION:** Is this task order open to only CPA’s Pre-qualified Providers? Can you explain the  
12 CPA Prequalification Process?

13

14 **CHRIS STEPHENS:** Yes, this is a task order that has been issued as part of CPA’s PQP Request  
15 for Qualifications (“RFQ”) process. If you would like your submittal to be considered for this task  
16 order, please review the instructions to complete a PQP RFQ submittal here:  
17 <https://cleanpoweralliance.org/get-involved/job-contracting-opportunities/>

18

19 (brief pause)

20

21 **QUESTION:** What are the examples of Assistive Technologies that CPA intends to use for this  
22 pilot?

23

24 **TYLER AGUIRRE:** Some potential examples of technologies could include smart thermostats,  
25 smart plugs, mobile applications. CPA is also open to using emerging technologies in the pilot.

26

27 **QUESTION:** Is there a defined budget for this Scope of Work.

28

1 **TYLER AGUIRRE:** CPA expects that the cost of the work will be on or around \$75,000.

2

3 **QUESTION:** Are there customers on TOU rates? If so, what portion?

4

5 **TYLER AGUIRRE:** CPA has about 200,000 residential customers that are currently on TOU  
6 rates. CPA also has 500,000 residential customers defaulting to TOU rates in Q1 2022. The  
7 anticipated size of the pilot is 1,000 – 3,000 residential customers. CPA anticipates that those pilot  
8 participants will be a mix of customers that have voluntarily moved to TOU rates in order to  
9 participate in the pilot and customers that are already on TOU rates.

10

11 **QUESTION:** Can you share the evaluation criteria for this task order?

12

13 **CHRIS STEPHENS:** Yes. CPA will select the proposal that offers the best value to CPA. A  
14 definition of “best value” can be found in CPA’s Non-Energy Public Contracting policy located  
15 on CPA’s website under the key documents section.

16

17 (brief pause)

18

19 **CHRIS STEPHENS:** Okay, seeing no new questions come into the chat, I’m going to conclude  
20 the webinar. I just want to remind all attendees that you can always submit a question to  
21 [contracting@cleanpoweralliance.org](mailto:contracting@cleanpoweralliance.org) with a copy to [taguirre@cleanpoweralliance.org](mailto:taguirre@cleanpoweralliance.org). We  
22 appreciate your time and attendance today. Thank you so much and have a great day.

23

24 (webinar concluded)