Task Order Webinar

Residential TOU Assistive Technology Pilot and Study

February 16, 2021
Agenda

- Housekeeping
- Introductions
- CPA Background
- Task Order Overview
- Webinar Q&A
- Wrap-Up
Housekeeping

- Audio – Disabled but please keep phone on mute
- Video – Disabled
- Questions must be submitted via the text chat window to Chris Stephens. Questions will be addressed in the Q&A time at the end of the presentation.
- Additional questions should be emailed to contracting@cleanpoweralliance.org with a copy to taguirre@cleanpoweralliance.org.
- This presentation and a transcript will be available on CPA's website shortly after the call.
Residential TOU Assistive Technology Pilot and Study

Introductions
Residential TOU Assistive Technology Pilot and Study

CPA Background
CPA Background

- CPA is a Community Choice Aggregation ("CCA") program, established as a Joint Powers Authority made up of 32 local agencies across Los Angeles and Ventura Counties.
- CPA began offering retail electric services in February 2018.
- Today, CPA is the fifth largest Load Serving Entity (LSE) in California and the largest CCA in the nation serving 11,600 GWh of annual load across ~1M customer accounts in SoCal.
- CPA competes with Southern California Edison and Direct Access providers for retail customers within its territory.
CPA Service Territory
Residential TOU Assistive Technology Pilot and Study

Project Background
Project Background

• The CPUC has directed California IOUs to default all residential customers to Time of Use ("TOU") rates by 2022. CCAs have the discretion to determine whether to default their customers to TOU rates.

• CPA residential customers will default to TOU rates in February 2022, though they have the ability to "opt out" and return to flat, tiered rates.

• CPA is conducting this pilot ahead of the mass default to study the potential for assistive technology to improve customer awareness of TOU as well as improve customer ability to adapt and respond to TOU pricing.
Project Background (Cont.)

- CPA is interested in helping customers learn to respond to and remain opted-in to TOU rates for several reasons

- TOU can help customers save money

- Customer engagement with TOU rates can reduce the amount of high priced energy CPA has to purchase in the wholesale market and smooth out the renewable "duck curve"

- Reduce GHG emissions associated with "peaker" generation resources

- CPA is particularly interested in ways to support customers that may be more vulnerable to TOU-related bill increases
Residential TOU Assistive Technology Pilot and Study

Task Order Overview
Scope of Services

- CPA is seeking proposals from Prequalified providers to design and study a pilot program commencing in June 2021 that will evaluate the ability of assistive technology to help residential customers migrating to TOU rates successfully reduce their consumption in response to summer on-peak pricing (“TOU Pilot Program”).

- CPA is running a concurrent solicitation for the assistive technology(s). This solicitation will be posted by 5pm today on CPA's website.
Scope of Services (Cont.)

- CPA envisions the development of the pilot and study to be a highly collaborative process between CPA staff, selected assistive technology provider, and Selected Proposer.

- The Selected Proposer will not be responsible for customer recruitment or deploying devices to customers participating in the pilot.

- Selected Proposer will not be eligible to submit bids to be a technology provider in the pilot.
Task 1 and Deliverables

- High-Level: TOU Pilot Implementation Plan, Pilot Metrics
- Tasks may include:
  - Review of customer recruitment strategy, outreach plan, and customer messaging
  - Development of Implementation Plan
  - Development of Pilot Metrics
Task 2 and Deliverables

- High-Level: Monthly Updates on participant data and recommended modifications

- Tasks may include:
  - Assignment of program participants to study groups (high touch/low touch)
  - Establishment of control group
  - Load data analysis of program participants
  - Monthly monitoring of program participant usage data
Task 3 and Deliverables

- High-Level: Reporting of Study and Survey Results
- Tasks may include:
  - Customer survey administration on TOU awareness
  - Customer Consumption analysis
Task 4 and Deliverables

• High-Level: Final Report and Recommendation

• Tasks may include:
  – Preparation of summary report
  – Preparation of recommendations regarding implementation of pilot at scale
  – Attendance at CPA Jan 2022 Board meeting

(See Task Order, Section IV (Task List) for more information.)
Term of Work

- The requested task order services are expected to commence on March 12, 2021.
- All task order work will be completed no later than March 12, 2022.
Q&A Process

- All questions regarding this task order are due by 4PM (pacific time) on February 19, 2021, in writing, to contracting@cleanpoweralliance.org with a copy to taguirre@cleanpoweralliance.org

- All questions will be responded to in writing and will be posted to CPA's website on February 23, 2021 by 5PM.

- CPA will not be responding to any questions or communications related to the task order outside of the formal Q&A process and this webinar.

NOTE: If it is discovered that a Bidder contacts and receives information from any CPA personnel, board director or alternate outside of this Q&A process, CPA may, in its sole determination, disqualify such Bidder’s proposal from further consideration.
## Task Order Schedule

<table>
<thead>
<tr>
<th>Description</th>
<th>Date/Time*</th>
</tr>
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<tbody>
<tr>
<td>Release of Task Order</td>
<td>February 10, 2021</td>
</tr>
<tr>
<td>Bidders’ webinar</td>
<td>February 16, 2021 at 2:00pm</td>
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<tr>
<td>Deadline for written questions</td>
<td>February 19, 2021 by 4:00pm</td>
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<tr>
<td>CPA response to questions</td>
<td>February 23, 2021 by 5:00pm</td>
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<tr>
<td><strong>Task Order proposals due</strong></td>
<td><strong>February 26, 2021 by 4:00pm</strong></td>
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<tr>
<td>Evaluation of proposals</td>
<td>March 1-2, 2021</td>
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<tr>
<td>Interviews, if any</td>
<td>March 3-4, 2021</td>
</tr>
<tr>
<td>Contract negotiations, if any</td>
<td>March 8-11, 2021</td>
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<tr>
<td>Execution of contract</td>
<td>No later than March 12, 2021</td>
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*All times are Pacific Time*
Proposal Submittal Process

• Proposals should be submitted by 4PM (pacific time) on February 26, 2021 to contracting@cleanpoweralliance.org with a copy to taguirre@cleanpoweralliance.org.

• The subject line of your submittal should be "Task Order Submittal for Residential TOU Assistive Technology Pilot & Study”

• Submissions should include the following components, as described in the task order:
  – Overall approach to the work
  – Detailed project schedule and milestones
  – Detailed workplan for completion of deliverables
  – List of subconsultants, if applicable, and roles by task
  – Examples of similar projects and processes
  – Cost, including list of personnel with titles and rates
  – Completed Vendor Campaign Contribution Disclosure Form (Exhibit D5)
  – Signed Public Records Act Letter Agreement (Exhibit D6)
Residential TOU Assistive Technology Pilot and Study

Webinar Q&A
Residential TOU Assistive Technology Pilot and Study

Thank You!