Request for Proposals
Webinar

Residential TOU Assistive Technology Providers

February 23, 2021
Agenda

- Housekeeping
- Introductions
- CPA Background
- RFP 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 Providers RFP

Introductions
Residential TOU Assistive Technology Providers RFP

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
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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 Providers RFP

RFP Overview
Scope of Services

- CPA is seeking proposals from providers to design, supply, and deploy an assistive technology solution, in conjunction with marketing and educational support provided by CPA, to TOU eligible CPA residential customers.

- CPA is running a concurrent solicitation for an assistive technology pilot and study task order. Please visit CPA’s website under the Jobs & Contracting Opportunities section for more information.
Scope of Services (Cont.)

- CPA envisions the development of the pilot and study to be a highly collaborative process between CPA staff, pilot and study consultant, and Selected Proposer for this RFP.

- The Selected Proposer will be responsible for deploying devices to customers enrolled by CPA in the pilot.
  - Alternatively, if prospective bidders have other methods of customer recruitment for this TOU pilot program, they may include a detailed description of the recruitment method in their proposals.

- Selected Proposer will not be eligible to submit bids to the Residential TOU Pilot Program Task Order for pilot and study design.
Task 1 and Deliverables

- **High-Level: Kickoff and Program Coordination**
- **Tasks may include:**
  - Meet with CPA team for kickoff
  - Coordinate with CPA staff and TOU Pilot consultant as needed to facilitate program and study
  - Development of written plan for deployment, including how technology will be removed or transitioned
Task 2 and Deliverables

• High-Level: Technology Deployment

• Tasks may include:
  – Selected Proposer to deploy technology to customers that have enrolled in program and provide any technical support
  – This may occur on rolling basis throughout the pilot duration
Task 3 and Deliverables

- High-Level: Data and Reporting

- The Selected Proposers will provide the following data to CPA if applicable or available:
  - Customer data such as name, address, account number, etc
  - Whether customer activated or installed technology
  - When customer activated or installed technology
  - Level of customer engagement with technology, including customer responsiveness to price signals
  - Customer performance data
  - Technological support requested and provided, along with resolution rates
Task 4 and Deliverables

• High-Level: Post TOU Pilot Program Activities

• Tasks may include, if applicable:
  – Uninstall, remove technology, or;
  – Provide pathway for customers to continue using the technology after the conclusion of the pilot

See RFP Attachment A (Scope of Services) for more information.
Term of Work

- The requested RFP services are expected to commence on April 6, 2021.

- All work related to this RFP will be completed by the selected proposer no later than April 6, 2022.
Q&A Process

- All questions regarding this RFP are due by 4PM (pacific time) on February 26, 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 March 2, 2021.

- CPA will not be responding to any questions or communications related to the RFP 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.
# RFP Schedule

<table>
<thead>
<tr>
<th>Description</th>
<th>Date/Time*</th>
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<tbody>
<tr>
<td>Release of RFP</td>
<td>February 16, 2021</td>
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<tr>
<td>Bidders’ webinar</td>
<td>February 23, 2021 at 1:00pm</td>
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<tr>
<td>Deadline for written questions</td>
<td>February 26, 2021 by 4:00pm</td>
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<tr>
<td>CPA response to questions</td>
<td>March 2, 2021</td>
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<tr>
<td><strong>RFP proposals due</strong></td>
<td><strong>March 5, 2021 by 4:00pm</strong></td>
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<tr>
<td>Evaluation of proposals</td>
<td>March 8-12, 2021</td>
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<tr>
<td>Interviews, if any</td>
<td>March 15-17, 2021</td>
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<tr>
<td>Contract negotiations, if any</td>
<td>March 22-April 2, 2021</td>
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<tr>
<td>Execution of contract</td>
<td>No later than April 6, 2021</td>
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*All times are Pacific Time*
Proposal Submittal Process

• Proposals should be submitted by 4PM (pacific time) on March 5, 2021 to contracting@cleanpoweralliance.org with a copy to taguirre@cleanpoweralliance.org.

• The subject line of your submittal should be “Submittal for Residential TOU Assistive Technology Provider RFP”

• Submissions should include the following components, as described in the RFP:
  – Proposer’s Qualifications and Experience
  – Proposer’s Approach to Scope of Services
  – Proposer’s Pricing
  – A completed Prospective Contractor References Form (Attachment B)
  – Any requested changes to CPA’s Pro Forma Contract (Attachment D), if any
  – A completed Vendor Campaign Contribution Disclosure Form (Attachment E)
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Webinar Q&A
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Thank You!