Transcript of Prospective Bidder Webinar
for the CPA Residential Time Of Use ("TOU")
Assistive Technology Provider RFP

The following webinar took place on February 23, 2021 from 1:00 PM – 2:00 PM.

CHRIS STEPHENS: Welcome everyone to the Clean Power Alliance of Southern California ("CPA") webinar for the Residential Time Of Use ("TOU") Assistive Technology Provider RFP. We are glad to have folks on the line and we appreciate your interest and participation in this webinar today. We want to make sure that this is a helpful experience for each of you as you prepare your proposals for the RFP.

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

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

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

To access the chat window, locate the Zoom Dashboard on your desktop. There are a few dropdowns in the Zoom list. Click "More." All the way at the top of this list is "Chat." If the chat window is minimized, please click the little arrow to the left of the word "Chat" so that the chat box is available for typing in your questions.

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

If you don't feel comfortable asking questions here at the webinar, you can always send us an email with your questions to contracting@cleanpoweralliance.org with a copy to taguirre@cleanpoweralliance.org.

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

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

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

JOSEPH CABRAL: I'm Joe Cabral and I'm CPA's External Affairs Manager for Ventura County.

CHRIS STEPHENS: Great. Now I am going to turn it over to Tyler to talk about CPA's background and more about this RFP.

TYLER AGUIRRE: CPA is a Community Choice Aggregation ("CCA") program. CPA is the largest CCA in the country and the fifth largest Load Serving Entity ("LSE") in California. CPA began offering retail electric service in 2018. CPA competes with Southern California Edison and Direct Access providers for retail customers within its territory.

This next slide represents a visual representation of CPA's territory. As you can see, CPA's territory encompasses large portion of Los Angeles and Ventura county.

The California Public Utilities Commission ("CPUC") has directed California Investor-Owned Utilities ("IOUs") to default all eligible residential customers to TOU rates by 2022. CCAs were exempt from this requirement and could choose whether to follow the IOUs in this transition. CPA elected to default its customers for a number of reasons that will be discussed on the next slide. As such, CPA eligible 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.

So, this slide is a list of reasons why CPA is interested in helping customers transition to TOU rates. TOU rates can help customers save money. There are also customer engagement benefits around TOU rates that can reduce the amount of high-priced energy CPA has to purchase in the wholesale market. TOU rates can potentially reduce GHG emissions associated with "peaker" generation resources. CPA is also particularly interested in ways to support customers that may be more vulnerable to TOU-related bill increases.

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 in CPA's territory. CPA is considering an array of potential technologies, including emerging technologies. Essentially, the technologies must provide a visual, auditory, or another type of signal to customers letting them know when to reduce their usage during peak pricing.

CPA is running a concurrent solicitation for an assistive technology pilot and study task order. The pilot and study consultant will be helping us to design the pilot and an accompanying study so we can evaluate the effectiveness of TOU support.

CPA is envisioning the development of the pilot and study to be a highly collaborative process between CPA staff, the 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. However, there must be some attention paid to how CPA customers will be identified. CPA's territory is quite a patchwork, so it is important that the customers enrolled be CPA customers. Please note that Selected Proposer for this RFP will not be eligible to submit bids to the Residential TOU Pilot Program Task Order for pilot and study design.

The next few slides are an overview of the RFP Tasks and Deliverables. Task #1 will be the Kickoff and Program Coordination. Subtasks may include (i) meeting with CPA team for the kickoff, (ii) coordinating with CPA staff and TOU Pilot consultant as needed to facilitate program and study, and (iii) development of written plan for deployment, including how technology will be removed or transitioned.

Task #2 will be the Technology Deployment. Subtasks may include (i) deploying the assistive 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 will be Data and Reporting. Subtasks may include providing regular reporting data to CPA. The data may include (i) Customer data such as name, address, account number, etc, (ii) whether the customer activated or installed technology, (iii) when the customer activated or installed technology, (iv) the level of customer engagement with technology, including customer

responsiveness to price signals, (v) the customer's assistive technology performance data, (vi) the technological support requested and provided, along with resolution rates.

Task #4 will be Post TOU Pilot Program Activities. Subtasks may include (i) uninstalling, or removing the technology, or (ii) providing a pathway for customers to continue using the technology after the conclusion of the pilot.

Please refer to the RFP Attachment A (Scope of Services) for more information about the tasks and deliverables that CPA is looking to have the Selected Proposer provide for this RFP.

The work associated with this RFP will commence on April 6, 2021 and will conclude on April 6, 2022.

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

I do want to touch upon some of the more important details for potential proposers to consider when preparing their proposals. The RFP has a set-schedule. 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.

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

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 the submittal should be "Submittal for Residential TOU Assistive Technology Provider RFP"

Please be sure to include in your submissions the following components: (i) Proposer's Qualifications and Experience, (ii) Proposer's Approach to Scope of Services, (iii) Proposer's Pricing, (iv) A completed Prospective Contractor References Form (Attachment B), (v) Any requested changes to CPA's Pro Forma Contract (Attachment D), if any, & (vi) A completed Vendor Campaign Contribution Disclosure Form (Attachment E).

Now is the time where we will move onto the Q&A portion of the webinar. If any interested bidders have questions for us, then please feel free to send us those questions now.

(brief pause)

TYLER AGUIRRE: CPA has received a question. Is there a link between this RFP and CPA's DR program?

Our response to that is there is no link between this RFP and a CPA DR program. In the RFP, we have asked for potential proposers to describe any DR functionality in their proposed technologies, but this is a separate pilot.

QUESTION: Is CPA putting any preference on enabling devices versus behavioral based solutions?

TYLER AGUIRRE: CPA is not putting any preference a particular solution. CPA is considering an array of potential solutions for this pilot.

QUESTION: How does CPA envision working with the selected RFP Proposer(s) and the selected Task Order Proposer(s)?

TYLER AGUIRRE: CPA is anticipating this to be a collaborative effort between the CPA, the selected RFP Proposer(s), and the selected Task Order Consultant(s). CPA envisions that it will be the main point of contact to bridge the conversation between the selected RFP Proposer(s) and the selected Task Order Consultant(s). However, CPA does anticipate that there may need to be some additional coordination between the selected RFP Proposer(s) and the selected Task Order Consultant(s) for data transmission and clarifying questions about the selected technology. That will be discussed in more detail at a kick-off meeting and regular check in meetings between all those involved.

QUESTION: Does CPA prefer bids that include customer acquisition or do you have a proven channel for marketing and acquisition that you can share?

JACK CLARK: CPA has an existing External Affairs and Marketing team. Currently, CPA is preparing our approach for customer acquisition for this pilot. This is in part to maintain CPA's relationship with its customer base, but also to expedite the process sue to the relatively short timeline of the study. If any potential proposer has additional thoughts on the customer acquisition effort of this pilot, then CPA is open to reviewing that in their proposal.

QUESTION: Has CPA tested other products in the past?

TYLER AGUIRRE: No.

CHRIS STEPHENS: Okay, there are no new questions coming into the chat, We will conclude the webinar. I just want to remind all attendees that you can always submit a question to

contracting@cleanpoweralliance.org with a copy to taguirre@cleanpoweralliance.org. We appreciate your time and attendance today. Thank you so much and have a great day.

(webinar concluded)