



Request for Proposals Webinar

Demand Response Implementation Services

April 19, 2021

Agenda

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

Housekeeping

- Audio – Disabled but please keep phone on mute if joining by phone
- Video – Disabled
- Questions must be submitted via the text chat window to Tyler Aguirre. Questions will be addressed in the Q&A time at the end of the presentation.
- Additional questions should be emailed to taguirre@cleanpoweralliance.org with a copy to contracting@cleanpoweralliance.org .
- This presentation and a transcript will be available on CPA's website by Friday, April 23.

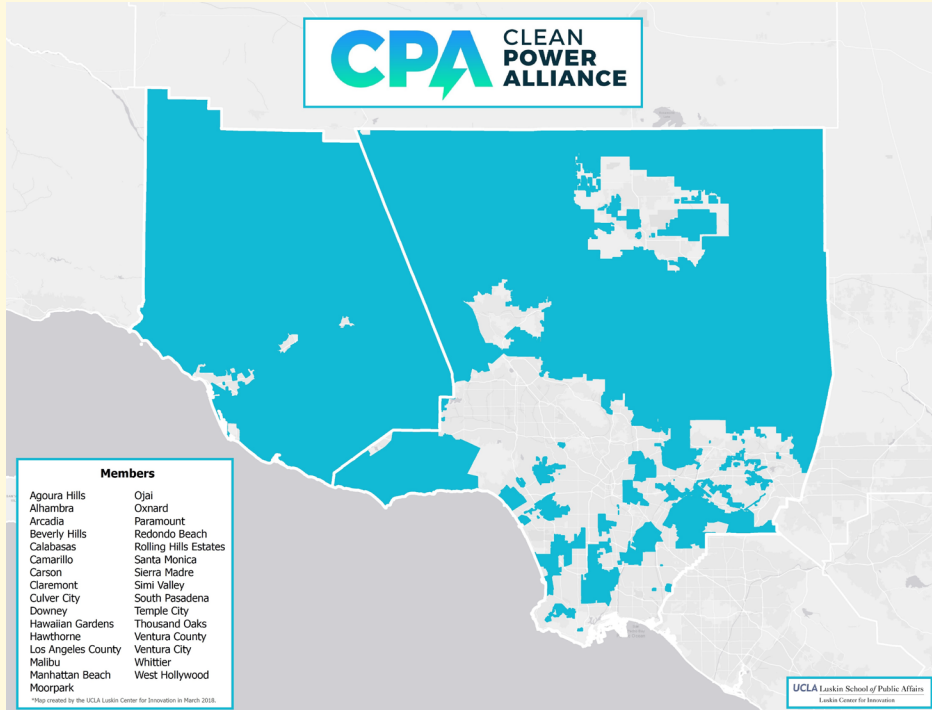
Introductions

CPA Background

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- 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



Program Background

Program Background

- In February of 2020, CPA launched a demand response pilot program (“Power Response”) that, by design, focused on activating residential customers with existing installed smart thermostats or battery storage and commercial customers with existing installed battery storage or EV charging technology.
- Now that the Power Response pilot has almost concluded, CPA is seeking Proposals to scale the implementation utilizing a delivery model that emphasizes market-driven customer acquisition and direct load control through Trade Ally partnerships.
- A Trade Ally (for the purposes of this RFP) is defined as a manufacturer, vendor, developer, aggregator, or installer of DER technologies.

Project Background (Cont.)

- Through full implementation of the Power Response program, CPA is seeking to expand its demand response offerings to a greater number of CPA commercial and residential customers to increase clean, flexible energy capacity
- The program goal is to enroll a minimum of 6 MW of demand response capacity, with 1 MW of that goal attributable to enrollment of customers taking service on CARE/FERA rates or located in disadvantaged communities in CPA territory

RFP Overview

Scope of Services

- CPA is seeking proposals to market, implement, and scale a comprehensive Distributed Energy Resources (“DER”) focused demand response program.
- The CPA Power Response program goal is to cost effectively enroll a minimum of 6 MW of demand response capacity in CPA territory during contract term. CPA does anticipate for the program to continue to scale past the initial contract term.

Task 1 and Deliverables

- **High-Level: Program Review and Implementation Plan**
- **Subtasks include:**
 - Review current program and provide recommendations for modification.
 - Develop an Implementation Plan in consultation with CPA staff to enroll 6 MW of capacity into the Power Response program during the Term of the agreement.
 - The Implementation Plan will be a roadmap to reach the desired enrolled capacity and include elements such as program design, customer segmentation, plan for Trade Ally network development, program goals, metrics, and CAISO market participation strategy

Task 1 (Cont.)

CPA is open to implementation approaches to meet this level of enrolled DR capacity, but the Implementation Plan must, at a minimum:

- Include offerings for both commercial and residential customers
- Include smart thermostat and battery storage demand response options for residential customers
- Include EV charging and commercial battery storage demand response options for commercial customers
- Provide CPA with the ability to call at least 35 demand response events per year per enrolled customer
- Address Trade Ally network development plan and direct load control potential in CPA territory
- Address how to meet enrolled capacity goal of 1 MW for low-income customers and those living or located in disadvantaged communities (“DACs”)
- Describe how Power Response enrolled demand response capacity will generate wholesale market or Resource Adequacy (“RA”) value to CPA beyond avoided wholesale energy purchases

Task 2 and Deliverables

- **High-Level: Marketing**
- **Subtasks include:**
 - Market Research
 - Review of current and past marketing strategies, messages, and collateral employed during the pilot
 - Development and execution of marketing plan

Task 3 and Deliverables

- **High-Level: Trade Ally Network Development**
- **Subtasks include:**
 - Develop a qualified network of Trade Allies on CPA's behalf to acquire potential customers into the Power Response program
 - Work with CPA to develop Trade Ally selection criteria with CPA providing oversight, input, and final approval on Trade Ally selection.
 - Facilitate Distributed Energy Resource Management systems (DERMS) integration of Trade Ally technologies to enable direct load control options.

Task 4 and Deliverables

- **High-Level: Program Implementation and Operations**
- **Subtasks include:**
 - Integration of existing pilot customers (up to 1,000)
 - Program Operations, including customer verification and enrollment, demand response event scheduling and notification, incentive processing
 - Customer relationship management and customer service

Task 5 and Deliverables

- **High-Level: Demand Response Provider (DRP) and Distributed Energy Resources Provider (DERP) Services**
- **Subtasks include:**
 - Performance of all necessary functions enabling CAISO market integration of CPA's Demand Response resource
 - Meter data management
 - CAISO registration of enrolled DER/DR resources via DRRS
 - Event baseline and performance calculations
 - Monthly CAISO transaction reporting

Task 6 and Deliverables

- **High-Level: Scheduling Services**
- **Subtasks include:**

Performance of all applicable required functions of a Scheduling Coordinator, utilizing the CPA SCID, including

- All scheduling and bidding functions in the applicable markets
- Resource Management
- Market monitoring
- Settlements

Task 7 and Deliverables

- **High-Level: Overall Program Performance Tracking**
- **Subtasks include:**
 - Meet regularly with CPA program staff to review progress toward program goals
 - Development of dashboard that provides CPA staff with mutually agreed upon monthly reporting
 - Comprehensive quarterly and annual report describing overall program performance

Scope of Services

This is not an exhaustive review. See RFP Attachment A (Scope of Services) for more detailed information for each Task.

Qualifications and Experience

The Proposer must:

- Have demonstrated experience implementing and scaling similar types of mass market demand response programs.
- Have applicable qualifications and experience in distributed energy resource management systems (“DERMS”) and CAISO’s Demand Response Registration System (“DRRS”).
- Be a certified CAISO scheduling coordinator (“SC”) and a registered Demand Response Provider (“DRP”)/Distributed Energy Resources Provider (“DERP”) or retain these services.

Qualifications and Experience (Cont.)

The Proposer must:

- Utilize universal DERMS platform to manage enrolled resources, dispatch events, and support multiple technologies and Trade Allies.
- Have experience in managing Trade Ally Networks and developing and implementing market driven customer acquisition strategies.

Term of Work

- The requested RFP services are expected to commence on July 1, 2021.
- All work related to this RFP will be completed by the selected proposer no later than December 31, 2023.
- Potential for up to three one year extensions.

Budget

- The anticipated budget for the program is \$1.2 million per year. This is inclusive of customer and/or vendor incentives.

Q&A Process

- All questions regarding this RFP are due by 4PM (pacific time) on April 23, 2021, in writing, to taguirre@cleanpoweralliance.org with a copy to contracting@cleanpoweralliance.org.
- All questions will be responded to in writing and will be posted to CPA's website on April 27, 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 (Subject to Change)

Description	Date/Time*
Release of RFP	April 12, 2021
Bidders' webinar	April 19, 2021 at 3:00pm
Deadline for written questions	April 23, 2021 by 4:00pm
CPA response to questions	April 27, 2021
RFP proposals due	May 7, 2021 by 4:00pm
Evaluation of proposals	May 10-21, 2021
Interviews, if any	May 24-28, 2021
Contract negotiations, if any	June 7-25, 2021
Execution of contract	No later than July 1, 2021

*All times are Pacific Time

Proposal Submittal Process

- Proposals should be submitted by 4PM (pacific time) on May 7, 2021 to taguirre@cleanpoweralliance.org with a copy to contracting@cleanpoweralliance.org.
- The subject line of your submittal should be “Submittal for Demand Response Implementation Services RFP”.
- Submissions should include the following components, as described in the RFP:
 - Proposer’s Qualifications and Experience
 - Proposer’s Approach to Scope of Services (Exhibit A)
 - Proposer’s Pricing, broken down by the categories specified in the RFP
 - Proposed timeline and workplan for completion
 - A completed Prospective Contractor References Form (Attachment B)
 - Any requested changes to CPA’s Pro Forma Contract (Attachment D)
 - A completed Vendor Campaign Contribution Disclosure Form (Attachment E)

Webinar Q&A

Demand Response Implementation Services RFP

Thank You!

