

*Transcript of Request for Proposals Webinar
For the Printing and Mailing Services RFP*

The following webinar took place on July 7, 2021 at 3:00PM – 4:00PM

ALLISON HANG: Good afternoon. Thank you all for joining this webinar on CPA's Printing and Mailing services Request for Proposals.

I'm Allison Hang, Customer Care Analyst. Our agenda for today is to start with some housekeeping and introductions, review the RFP submittal process, provide a brief background on CPA and our printing and mailing needs, and finally some time for Q&A.

Moving right into the housekeeping, the audio is Disabled but please keep your phone on mute if joining by phone. The Video is also Disabled. We ask that questions be submitted via the text chat window so that we can address them as efficiently as possible. You can submit questions at any time, but questions will only be addressed in the Q&A time at the end of the presentation. Please note that this presentation is being recorded and a transcript will be available on CPA's website by 3:00 PM this Friday, July 9th.

In addition to myself, we have a couple other folks from CPA on the call today. Dr Monique Edwards Greer, Vice-President of Technology, Data, and People. Sherita Coffelt, Senior Director, External Affairs. And Nancy Whang, our General Counsel.

We are starting with the RFP Submittal Process because proposals must be complete and properly submitted to be considered. If a proposal does not include all required elements, it will be disqualified so let's review these required elements:

Proposals should be submitted by 4PM (pacific time) on July 23, 2021 to ahang@cleanpoweralliance.org with a copy to contracting@cleanpoweralliance.org.

The subject line of your submittal should include "PROPOSAL FOR PRINT AND MAILING SERVICES".

Submissions MUST include the following components as described in the RFP. We will be releasing an Addendum #1 today. This Addendum #1 will be emailed today and posted on CPA's website today. It is very important that you use the versions of the forms from this addendum. Submissions that use the forms from the original RFP and not the addendum #1, will be disqualified. If another addendum is issued, then submissions must use the forms from that addendum. The key concept is that it is important to use the most recent version of these forms.

The first form that must be submitted is a:

1. Completed affirmation of proposer's ability to meet the Qualifications and Experience and the Scope of Services. This form is Attachment I in Addendum #1.

The second form that must be submitted is a:

2. Completed pricing form. This form is Attachment J in Addendum #1.

The third form that must be submitted is a:

3. Proposer's completed Prospective Contractor References Form. This form is Attachment B in Addendum #1.

And finally if

4. There are any required changes to CPA's pro forma Contract, those must be submitted. The pro forma contract is Attachment D in Addendum #1. If no changes are required, then you do not need to submit the sample contract.

We have made these 3 forms (and contract changes, if applicable) constitute a complete submission in order to make the process as simple and streamlined as possible for proposers. Because submitting these documents is necessary for a complete proposal, we will review each of them.

Slide 7. This slide shows the first required form - the affirmation of proposer's ability to meet the Qualifications and Experience and the Scope of Services. This form is Attachment I in the RFP Addendum #1, you can see from the red that this form was updated in the addendum. The updates are so that you only need to submit the three forms and the contract change, if applicable.

The form is two pages. The first page addresses qualifications and experience and the second page addresses the scope of services. To complete the first page (shown here), you check the applicable boxes. So starting at the black arrow, it reads "qualifications and experience (printing)" if you are submitting a proposal for printing, you must check the three boxes below. The last box (shown on the slide within the black box) is optional to check if you have experience working with a Community Choice Aggregator CCA) or a local government agency on customer notifications. If you do check this box, please list the organization or organizations that you have experience working with.

Now going to the second black arrow, it reads "Qualifications and Experience (mailing)" if you are submitting a proposal for mailing, you must check the five boxes below. Again the last box (shown on the slide within the black box) is optional to check if you have experience working with a CCA or a local government agency on customer notifications. If you do check this box, again please list the organization or organizations that you have experience working with.

If you are submitting a proposal for printing and mailing, you must check all 8 boxes shown here. And, if applicable, fill out the optional boxes.

Slide 8. This slide shows the second page of the affirmation of proposer's ability to meet the Qualifications and Experience and the Scope of Services. If you are submitting a proposal for printing services you must check the three boxes that pertain to printing services (shown by the black arrows here).

If you are submitting a proposal for mailing services you must check the three boxes that pertain to mailing services (shown by the black arrows here).

And if you are submitting a proposal for printing and mailing services you must check the four boxes that pertain to printing and mailing services (shown by the black arrows here).

And at the bottom of the form, it must have your name, signature, and the date.

Slide 11. This slide shows the second required form - the pricing form. This form is Attachment J in the RFP Addendum #1. The orange arrow shows the column to fill in for printing estimates. We are requesting estimates for printing four different jobs. And three different amounts of recycled content for each job. If you don't have all three types of recycled paper that is fine. But you must complete at least one estimate for each project and specify the paper weight used.

The green arrow shows the column to fill in for mailing estimates. We are requesting estimates for four different jobs and pricing to produce a National Change of Address report. Please note that postage should not be included in the Estimated cost for mailing.

If you are submitting a proposal for both printing and mailing, both columns should be completed.

Slide 12. This slide shows the third required form - the Proposer's completed Prospective Contractor References Form. This form is Attachment B in the RFP. Please note that if we have worked with you in the past, CPA cannot be a reference listed on this form.

Finally, if there are any required changes to CPA's pro forma Contract, those must be submitted. The pro forma contract is Attachment D in the RFP. If no changes are required, then you do **not** need to submit the sample contract.

Finally, a recap of these required components since they are necessary for a complete proposal:

Submissions **MUST** include:

1. Completed Attachment I - affirmation of proposer's ability to meet the Qualifications and Experience and the Scope of Services.
2. Completed Attachment J - pricing form.
3. Completed Attachment B - Prospective Contractor References Form.
4. And Any changes to CPA's Sample Contract.

Now a brief background on CPA to give you a better idea of who we are and what we are all about.

Clean Power Alliance is a not-for-profit community electricity provider that began offering retail electric services in February 2018.

CPA provides approximately 3 million customers in 32 communities across Los Angeles and Ventura Counties with reliable electricity from clean power sources.

CPA was formed when communities coordinated their electricity buying power to provide more clean power choices, including 100% Green Power, at competitive rates.

Slide 17. This map shows CPA's service territory in blue. And you can see that it covers most of Los Angeles and Ventura counties.

CPA has a variety of printing and mailing needs that we intend to meet with this RFP. These are addressed in more detail in the RFP Section II "Project Background", but I will briefly review the main types of printing and mailing projects.

Move-in Mailers:

CPA is required to send two mailed notices to every new customer in our service area. CPA has three different levels of service and has a different move-in notice for each service level (these correspond to the three versions). CPA currently prints enough mailers for about three months of each service level at once. The three months of inventory is then delivered by the printer to the mailing vendor. The mailing vendor then mails out three batches every week (one batch for every service level). The weekly amount is approximately 5,000 notices. Here are examples of the three different versions.

Compliance Mailers:

CPA sends two compliance notices to all customers every year: these are the Joint Rate Comparison Mailer and the Power Content Label mailer. The Joint Rate Comparison Mailer should arrive in mailboxes by July 1, 2022. There are four different versions of this mailer sent to customer groups in the following approximate sizes: 100,000, 20,000, 60,000, and 320,000. The Power Content Label should arrive in mailboxes by October 1, 2022. Only one version of this mailer is sent to approximately 500,000 customers.

Other Notices:

Additionally, two to three times a year CPA sends notices to customers for various programs or account changes. CPA expects to send approximately 60,000 notices between September 2021 and November 2021 to inform customers of a default change (this will likely be four different notices). And CPA expects to send approximately 50,000 notices in April 2022 to Net Energy Metering (or solar) customers. This will most likely be four different letters.

Enrollment Notices:

In the future, CPA may enroll new cities or counties. During periods of enrollment, all eligible electricity customers receive four notices. An example enrollment notices is shown on the bottom left here. There are 12 different versions of enrollment notices. The number of eligible customers depends on the city or county but could be up to 60,000 or more.

Ineligible program letters may also need to be sent. There is an example of one of these letters on the bottom right. There are 5 different versions. These are sent to subsets of customers and the quantities vary. They are sent in an envelope and contain variable data, as shown by the red text in the example below.

Other Printing Needs:

CPA may also conduct other forms of customer outreach and marketing that require printing and/or mailing services. For example, CPA want to print copies of our Annual Impact Report. Bottom left shows the cover page of that report. CPA may also need mailed notices and printed collateral for marketing various programs. Bottom right shows an example of a recent notice used for program marketing.

Now we are happy to answer any questions that you all have. Please submit your questions via the text chat window.

QUESTION: Will all changes to the original RFP be reflected in contrasting color text in the addenda?

ALLISON HANG: Yes, in the subsequent version. For example, in Addenda #1, it will show all changes between that Addenda #1 and the original RFP. If we did have to issue a second Addenda, then you would only see the differences in contrasting color between the second Addenda and the first Addenda.

QUESTION: Who is currently doing this project for you?

ALLISON HANG: Since that doesn't pertain to the RFP, that question will not be addressed.

QUESTION: Will CPA accept the use of a vendor's indicia that does not list an area?

ALLISON HANG: If there is an indicia that doesn't have any county listed at all, just a permit number, if that is the question? So in the RFP it states that you will use either our indicia or an indicia that lists an area in CPA's service territory. But if you could restate the question to clarify that would be helpful.

QUESTION: The paper specs are noted as 100-130lb paper. How do we bid this job so you can compare apples to apples?

ALLISON HANG: We provided a range for a count for what different vendors have available. Please specify the paper weight that you use and we will take that into consideration when we compare the bids. So it is required that you specify the paper weight that you use when you provide your bid.

QUESTION: Can a web press be used or is this offset only?

ALLISON HANG: Can you provide some more clarity on that question?

QUESTION: Typically a web press has different quality than an offset or digital press. Are you open to use any press we have available?

ALLISON HANG: We will respond to that in the Q&A when we post our responses online. Thank you very much for that.

QUESTION: The RFP states no indicia reflecting an out of service zip code may be used. If NO indication of the vendor's location is included in the indicia, will that be acceptable?

ALLISON HANG: So in the RFP, it says to use our permit or propose use of your mailing permit that lists an area in CPA's service territory on the indicia. CPA will not consider using an indicia that lists an area outside of CPA's service territory.

QUESTION: Does the CPA generate it's emailed notices internally or contract for that service?

ALLISON HANG: CPA currently generates our email notices internally.

QUESTION: Will CPA consider mailing from a nearby county?

ALLISON HANG: The RFP addresses the requirements and if it's not excluded in the RFP, then it is not excluded. I think these questions are mostly relating to the requirement in Section 3 of the RFP that says "For mailing services only, be able to use CPA's mailing permit for Business Mail Entry Unit 7001 S Central Ave RM 210, Los Angeles CA 90052-9614 or propose use of your own mailing permit that lists an area in CPA's service territory on the indicia. CPA will not consider using an indicia that lists an area outside of CPA's service territory."

If you think of questions over the next couple of days, we are happy to answer them.

All questions regarding this RFP, however, are due by 4PM (pacific time) this Friday July 9th, in writing, to ahang@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 July 16, 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.

Please NOTE that 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.

So it is very important to follow this process.

Thank you all very much for participating. I'd like to remind you that this presentation and a transcript will be available on CPA's website by 3:00 PM this Friday, July 9. Thank you again and have a lovely evening.

(webinar concluded)