

Clean Energy Alliance

JOINT POWERS AUTHORITY

REQUEST FOR INFORMATION

RFI # 2023-001

Electric Vehicle Load Shift Incentive Program

Date of Issuance: June 2, 2023

SUBMITTALS DUE:

5 P.M. (PST)

June 30, 2023

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CHIEF EXECUTIVE OFFICER**

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I. BACKGROUND

The Clean Energy Alliance (CEA) is seeking responses to this Request for Information (RFI) from qualified businesses or firms to develop and provide an Electric Vehicle Load Shift Incentive Program. CEA will determine if a viable program will be pursued upon review of responses to this RFI.

About CEA

In October 2019, the cities of Carlsbad, Del Mar and Solana Beach formed CEA, a non-profit public entity that operates a Community Choice Energy (CCE) program within their city limits, in the San Diego Gas & Electric (SDG&E) service territory. Since then, CEA has added the cities of Escondido, Oceanside, San Marcos, and Vista to their membership and has the potential to expand further in the future. CEA's purpose is to meet the Climate Action Plan goals of its member agencies as an energy services provider, which benefits the community through the delivery of cleaner and more locally produced electricity, demand reduction, economic investment, and competitive rates for residents, businesses, and municipal facilities in the service territory. For more information on Clean Energy Alliance visit www.TheCleanEnergyAlliance.org.

CEA's program allows participating local governments to pool the electricity demands of their communities in order to increase their purchasing power for higher renewable power content and invest in local energy infrastructure and energy efficiency programs. CEA is locally controlled and ratepayer supported, with no taxpayer subsidies. CEA serves approximately 150,000 customer accounts, expanding to over 220,000 in 2024.

By law, as a Joint Powers Authority (JPA), CEA is a separate legal entity from its member agencies and its budget is completely separate from the general funds of these local governments. Board meetings are open to the public. In addition, CEA will be funded through program reserves. The service territory of CEA may expand in the future to include additional counties and cities.

II. INTRODUCTION

CEA seeks to develop a consumer-facing program to incentivize electric vehicle (EV) load shifting for its customers. With an increasing number of EV owners in its service territory and an expressed interest in new EV programs by the CEA Community Advisory Committee and Board of Directors, EV load shifting could benefit residential customers while also reducing demand for electricity procurement when use and costs are highest ("on-peak" usage). CEA seeks to explore programs that would incentivize participants to shift EV charging to times when electricity is both lowest cost ("off-peak") and when electricity sources are the cleanest on the grid.

III. PROGRAM REQUIREMENTS

Specific program requirements include, but are not limited to:

- A. Program goals
 - 1. Assess CEA’s customer base and make informed or educated estimates about potential customers that can participate in the program.
 - 2. Identify program participation and outcome goals, including % of customer participation from a disadvantaged community.
 - 3. Determine metrics to evaluate and track program success including cost savings, greenhouse gas emissions avoided, number of participants, etc.
- B. Program design
 - 1. Describe all components of program design including technology needs (e.g., app development or use), customer engagement and feedback, how incentives will be used, ease of use for customers.
 - 2. Program should include creative, modern, customer-centric design components that allow customers to:
 - i. Save money by adjusting the time they charge their EVs.
 - ii. Support the goals of CEA to reduce demand during on-peak hours.
 - iii. Use the cleanest energy available, based on timing of clean energy availability on the grid.
 - iv. Streamline and incentivize their participation.
 - v. Integrate with their existing systems such as home EV charging apps.
 - 3. Identify and describe target customers, eligibility requirements, and consideration of various demographics and income levels.
 - 4. Identify a marketing and outreach component to drive customer education, participation, and interest.
 - 5. Describe customer support to be provided.
 - 6. Consider stakeholders and partners that could be involved:
 - i. Data sources such as the DMV, SDG&E, etc.
 - ii. Outreach partners such as dealerships, EV events, charging station owner/operators, etc.
- C. Program costs
 - 1. Determine costs, potential savings to participating customers, and other revenue, costs, or cost-savings to any parties including respondents, CEA, and participating customers.
- D. Additional desirable considerations for program development
 - 1. Low or no-cost for operations and maintenance of program for CEA.
 - 2. Incentives for customer participation will be considered.
 - 3. Use of technology (e.g., smart phone app) for customer participation and feedback.
 - 4. Integration of other clean energy, customer-owned technology such as home solar systems.

IV. QUESTIONS

Questions are to be submitted to Barbara Boswell, CEO, via email to: bboswell@TheCleanEnergyAlliance.org, by 5:00pm, June 14, 2023. Responses will be posted to the “Solicitations” page on the CEA website by June 21, 2023.

V. SUBMITTAL REQUIREMENTS

Submittals should be concise, well-organized and demonstrate the qualifications, experience and approach necessary to provide the required scope of services. Submittals shall include the following items in the order listed:

General qualifications, key personnel & sub-consultants – Submit a general description of your firm’s qualifications to complete the Program Requirements, along with the qualifications and specific roles of any sub-consultants to be employed on this project. Summary of qualifications should speak to relevant experience with the program design components. Include the names and qualifications of the key individuals who will be responsible for delivering these services, their respective roles, and the organizational structure of the team. Include resumes for key individuals who will provide service. Technical support staff should be included if they will perform a significant role in the preparation of the work products. If the firm has multiple offices, the office of record for each team member shall be listed, as well as the primary office location where the work is to be performed.

Experience – Provide summaries of up to two completed service contracts that are similar in scope or concept to the desired program. The summaries should include client name, contact information, scope of service, team members, date completed and total (or annual) cost of services.

References – Provide at least one additional reference for a program (whether similar or not) that your firm has implemented.

Approach – Describe your firm’s proposed approach to the Program Requirements. Identify the methods to be used in the completion of and/or carrying out the Scope of Required Services.

Schedule – Include an anticipated schedule for providing the services. Provide a statement of time commitment by the firm to this scope, justifying the firm’s ability to complete the Scope of Required Services.

Fee schedule – Include the proposed costs or fee schedule, as described in the Program Requirements.

VI. SELECTION

Submittals will be reviewed and based on the criteria listed below (listed in no particular order of importance or value of rating):

- Proposed program and methodology
- Best value
- Relevant experience and qualifications of the firm

Ultimate selection will be made by CEA’s Board of Directors.

VII. CONDITIONS GOVERNING THIS PROCUREMENT

Schedule

This section of the RFI provides the anticipated schedule for the solicitation and describes the events and the conditions governing the procurement.

Issue RFI	June 5, 2023
Deadline for written questions to be submitted (email)...	June 14, 2023 5:00 pm PST
Responses to written questions (posted to website).....	June 21, 2023
Submittal due date	June 30, 2023 5:00 pm PST
Evaluate Proposals (oral interviews if needed)	July 3 - 21, 2023

General Covenants

Claims against CEA

Neither your organization nor any of your representatives shall have any claims whatsoever against CEA, or any of their respective officials, agents, or employees arising out of or relating to this RFI or these RFI procedures, except as set forth in the terms of a definitive agreement between CEA and your organization.

Form of Proposals

Only electronic proposals will be accepted.

Public Records Act (PRA)

Please note that any information provided as part of a submittal in response to the RFI may be subject to the California Public Records Act (PRA). If the Proposer feels that any part of its submission is proprietary information, please identify by section, paragraph, and page the information the Proposer believes is proprietary. In the event of a PRA, this information may be reviewed by CEA’s attorneys for applicability. No guarantee can be provided that any part of the Proposer’s information will be kept confidential.

Confidentiality

All data and information obtained from or on behalf of CEA by the Proposer and its agents in this RFI process, including reports, recommendations, specifications, and data, shall be treated by the Proposer and its agents as confidential. The Proposer and its agents shall not disclose or communicate this information to a third party or use it in advertising, publicity, propaganda, or in another job or jobs, unless written consent is obtained from CEA. Generally, each proposal and all documentation, including financial information, submitted by a Proposer to CEA is confidential until a contract is awarded, when such documents become public record under State and local law, unless exempted under PRA.

VIII. SUBMITTAL & REVIEW

Firms must submit required materials no later than 5:00 PM on June 30, 2023, via email to bboswell@TheCleanEnergyAlliance.org Please title the email in the subject field as “EV Load Shift Incentive Program Proposal”. Submittals received after the specified time will not be considered.

IX. SUPPLIER DIVERSITY

General Order 156 (GO 156) is a California Public Utilities Commission ruling that requires utility entities to procure at least 21.5% of their contracts with majority women-owned, minority-owned, disabled veteran-owned and LGBT-owned business enterprises' ("WMDVLGBTBEs") in all categories. Qualified businesses become GO 156 certified through the CPUC and are then added to the GO 156 Clearinghouse database.

Information on the CPUC Clearinghouse can be found here: www.thesupplierclearinghouse.com. While CEA is not legally required to comply with GO 156, CEA's policies and commitment to diversity are consistent with the principles of GO 156, and, therefore, respondents to this RFI are asked to voluntarily disclose their GO 156 certification status as well as their efforts to work with diverse business enterprises, including those owned or operated by women ("WBE"), minorities ("MBE"), disabled veterans ("DVBE"), and lesbian, gay, bisexual, or transgender people ("LGBTBE").

CEA, as public agencies and consistent with state law, will not use any such provided information in any part of their decision-making or selection process. Rather, CEA will use that information solely to help evaluate how well it is conforming to its own policies and goals. Pursuant to California Proposition 209, CEA does not give preferential treatment based on race, sex, color, ethnicity, or national origin.

X. EQUAL OPPORTUNITY

CEA require all proposers to comply with equal opportunity policies. Contracts are open to all persons without regard to race, religion, color, national origin, sex, age, marital status, handicap, or political affiliation.

Thank you for your interest, and we look forward to reviewing your submittal.