

*Transcript of Prospective Bidder Webinar  
For the CPA Demand Response Program  
Implementation Services RFP*

The following webinar took place on April 19, 2021 from 3:00PM – 3:30PM.

**TYLER AGUIRRE:** Hello everyone and welcome to CPA’s webinar for the Demand Response Program Implementation Services RFP. My name is Tyler Aguirre from Clean Power Alliance. We are going to give it just another 30 seconds to let a few other folks join.

Alright everyone, let’s go ahead and get started. Again, my name is Tyler Aguirre from Clean Power Alliance. Thank you so much for joining us today. I am going to hand things over to Jack Clark and he’s going to introduce himself and kick us off.

**JACK CLARK:** Good afternoon everyone and welcome to our Request for Proposals Webinar for our Demand Response Implementation Services. My name is Jack Clark. I’m the Director of Customer Programs here at the Clean Power Alliance. We are thrilled that you are joining us this afternoon to go over this opportunity. Just a quick reminder that we will be recording this webinar for our own internal record keeping. Here is a snapshot of our agenda. We’ll go over some housekeeping, do introductions, cover a little bit about the Clean Power Alliance’s background, give an RFP overview, we’ll have our webinar questions & answer stage and then we’ll wrap up with next steps.

A few notes on housekeeping. Please keep your audio muted. If you are joining by phone, also keep that muted. Keep your videos disabled.

Questions must be submitted via the chat window to Tyler Aguirre. Questions will be addressed in the Q&A time at the end of the presentation. Any additional questions can be emailed to

[taguirre@cleanpoweralliance.org](mailto:taguirre@cleanpoweralliance.org) with a copy to [contracting@cleanpoweralliance.org](mailto:contracting@cleanpoweralliance.org). This presentation and the transcript will be available on CPA's website by this Friday, April 23.

Again, my name is Jack Clark. I'm Director of Customer Programs here at CPA. I have also got with me Tyler Aguirre, our customer Programs Manager at CPA and Erika Aguilar, our Contracts Manager.

The Clean Power Alliance is a Community Choice 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 in California and the largest CCA in the nation serving 11,600 GWh of annual load across 1M customer accounts in Southern California. CPA competes with Southern California Edison and Direct Access providers for retail customers within its service territory.

Here is a snapshot of our service territory. You can see there in the corner is a list of our 32 member agencies that make up the Clean Power Alliance.

Our 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. For the purposes of this RFP, a Trade Ally is defined as a manufacturer, vendor, developer, aggregator, or installer of DER technologies.

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 within CPA territory. And with that, I will hand it over to Tyler to handle our RFP.

**TYLER AGUIRRE:** Thank you Jack. I'll be going into a bit more detail on the RFP. Hopefully most if not all of you have had a chance to review it already. If not, it is available on our website. So, CPA is seeking proposals to market, implement, and scale a comprehensive Distributed Energy Resources ("DER") focused demand response program. The Power Response Program goal, as Jack just mentioned, is to cost effectively enroll a minimum of 6 MW of demand response capacity in our territory during contract term and CPA does anticipate for the program to continue to scale past the initial contract term.

The Scope of Work and the RFP is divided into seven main tasks and they all have detailed subtasks.

Task #1 will be Program Review and Implementation Plan. Subtasks may include, (i) reviewing the current program and providing recommendations for modification, (ii) developing 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, (iii) 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. CPA is open to implementation approaches to meet the level of enrolled DR but there are some requirements. The Implementation Plan must (iv) include offerings for both commercial and residential customers. (v) It needs to include smart thermostat and battery storage options for residential customers and EV charging and commercial battery storage options for commercial customers. (vi) It should provide CPA with the ability to call at least 35 demand response events per year per customer. (vii) It should address the Trade Ally network development plan and direct load control potential in CPA territory and it should also address how to meet enrolled capacity goal of 1 MW for low-income customers and those living or located in disadvantaged communities. (viii) Lastly, it should 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 will be Marketing. Subtasks may include (i) Market Research. This might include a variety of different types of analysis. That can look like customer segmentation analysis, customer interviews or surveys, an examination of DER distribution in CPA territory by technology type or competitive demand response landscape analysis. (ii) Review of current and past marketing

strategies, messages, collateral employed by CPA during the Power Response Pilot, and of course, (iii) the development and execution of a marketing plan. We anticipate that that will be developed and executed in close consultation with CPA staff including our External Affairs staff as well as the Trade Allies.

Task #3 will be Trade Ally Network Development. Subtasks may include (i) the development of a qualified network of Trade Allies on CPA's behalf to acquire potential customers into the Power Response program. (ii) The selected Proposer will work with CPA to develop Trade Ally selection criteria with CPA providing oversight, input, and approval on Trade Ally selection. (iii) The selected Proposer will also facilitate (DERMS) integration of Trade Ally technologies to enable direct load control options.

Task # 4 will be Program Implementation and Operations. Subtasks may include (i) integration of existing pilot customers, (ii) program operations including customer verification and enrollment, demand response event scheduling and notification, incentive processing and of course (iii) customer relationship management and customer service.

Task # 5 will be DRP and DERP Services. Subtasks may include (i) the performance of all necessary functions enabling CAISO market integration of CPA's Demand Response resource. That includes (ii) meter data management, (iii) CAISO registration of enrolled DER/DR resources via DRRS, (iv) event baseline and performance calculations and (v) monthly CAISO transaction reporting.

Task # 6 will be Scheduling Services. Subtasks may include (i) performance of all applicable required functions of a Scheduling Coordinator under the CPA SCID, including (ii) scheduling and bidding functions, (iii) resource management, (iv) market monitoring and (v) settlements.

Task # 7 will be Overall Program Performance Tracking. Subtasks may include (i) regular meetings with CPA program staff to review progress toward program goals, (ii) development of dashboard that provides CPA staff with mutually agreed upon monthly reporting and (iii) comprehensive quarterly and annual report describing overall program performance.

This is not an exhaustive review. I urge you to review Attachment A (Scope of Work) in the RFP for more detailed information for each task.

The next section will be Qualification and Experience. The Proposer must (i) have demonstrated experience implementing these types of programs in the past, (ii) have applicable qualifications and experience in distributed energy resource management systems and CAISO's Demand Response Registration System. (iii) The Proposer must be a certified CAISO scheduling coordinator ("SC") and a registered Demand Response Provider ("DRP")/Distributed Energy Resources Provider ("DERP") or retain these services. (iv) The Proposer must utilize universal DERMS platform to manage enrolled resources, dispatch events, and support multiple technologies and (v) must have experience managing Trade Ally Networks.

The requested RFP services are expected to commence on July 1, 2021 and all work related to this RFP will be completed by the selected Proposer no later than December 31, 2023. The RFP does allow for the potential for up to three one year extensions of the contract.

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

A quick explanation about the Q&A Process. We will pause briefly for Q&A momentarily but before we do I just want to note that all questions regarding this RFP are due by 4PM (pacific time) this Friday, April 23 in writing, to myself [taguirre@cleanpoweralliance.org](mailto:taguirre@cleanpoweralliance.org) with a copy to [contracting@cleanpoweralliance.org](mailto:contracting@cleanpoweralliance.org). All questions will be responded to in writing and will be posted to CPA's website no later than April 27. CPA will not be responding to any questions or communications related to the RFP outside of the formal Q&A process and this webinar. 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.

The next section will be the RFP schedule. I have already mentioned some of these dates, but I would like to draw your attention to a few dates bolded here. The RFP proposals are due May 7, 2021 by 4:00PM and we anticipate that we will be conducting interviews the week of May 24, so I urge you to maintain availability that week as we will have a short timeline to get these interviews scheduled. Please keep a note here for those dates. We expect to execute the contract no later than July 1, 2021. This is the date of our Board of Directors meeting. These dates are all subject to change.

Proposals should be submitted by 4PM (pacific time) on May 7, 2021 to [taguirre@cleanpoweralliance.org](mailto:taguirre@cleanpoweralliance.org) with a copy to [contracting@cleanpoweralliance.org](mailto: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: (i) Proposer's Qualifications and Experience, (ii) Proposer's Approach to Scope of Services (Exhibit A), (iii) Proposer's Pricing broken down by the categories specified in the RFP, (iv) Proposed timeline and workplan for completion, (v) a completed Prospective Contractor References Form (Attachment B), (vi) any requested changes to CPA's Pro Forma Contract (Attachment D), (vii) and a completed Vendor Campaign Contribution Disclosure Form (Attachment E). Those forms can all be found in the RFP packet.

We are now going to pause for Q&A. Please submit your questions via the chat box to myself. We'll be responding to those in just a moment as we receive them and determine the best staff person to respond. If there are any questions that we are unable to respond to at this time, we will include those questions in the written posting that will be found on the CPA website on April 27, 2021.

(brief pause)

**TYLER AGUIRRE:** CPA will now address the first question.

**QUESTION:** The question is regarding Task # 4. Specifically, SCE rule 24 data transfers. Can you please expand on the details of this scope, specifically I am curious if some form of customer consent for meter data sharing, ie green button, is required or is CPA able to avoid this step in the rule 24 process by sharing customer data directly with the vendor.

**TYLER AGUIRRE :** CPA is unable to avoid this step in the rule 24 process. CPA does not receive real time meter data from Edison (SCE), therefore it is required that the Proposer will need to have a process in place to initiate the Rule 24 meter data transfer process. Additionally, yes, I believe there is a form of customer consent for meter data sharing. I think this process varies for resident and commercial customers but there is a process for customer consent.

**QUESTION:** Is this inclusive to multi-family properties?

**TYLER AGUIRRE:** I assume this mean the whole program. So, yes, we fine with the inclusion of multi-family properties however there does need to be a direct relationship between CPA and the account holder that's enrolled in the program.

**QUESTION:** Are you expecting a price per MW or per task?

**TYLER AGUIRRE:** We are not expecting a price per MW, but we have included in the RFP a section on how we would like to see the Proposer's proposed budget broken down by different category. This is in the section of the RFP on page 7, and it is labeled, "Proposer Pricing".

**QUESTION:** Will the winning proposer be given some flexibility to design their own incentive structure? Please explain the process for designing incentives.

**TYLER AGUIRRE:** Yes, the winning proposer will be given flexibility to propose changes to the existing incentive structure for customers that has been established in our Power Response Pilot Program.

**QUESTION:** Can you please share some statistics on a pilot MW, asset distribution etc.

**TYLER AGUIRRE:** I do not have those statistics handy. We will take that question back internally and look at what we will be able to provide in writing after the webinar.

**QUESTION:** How much does this CPA territory overlap with SCE and LADWP service territories, in particular zip codes.

**TYLER AGUIRRE:** The CPA territory does not overlap at all with LADWP service territory. LADWP is completely limited to the city of Los Angeles which is not part of CPA's territory. Regarding overlap with SCE, there is 100% overlap with SCE. SCE provides transmission and distribution service to all CPA customers however CPA provides generation service to our customers in our member jurisdictions. We do have a detailed list of our member jurisdictions in the RFP.

**QUESTION:** Is CPA available to go above the 6-MW request?

**TYLER AGUIRRE:** Six MW is the minimum that we are requesting in the program, however, the budget is firm.

**QUESTION:** Does CPA have assumptions on how much power per battery?



**TYLER AGUIRRE:** No, we do not have any assumptions on how much power per battery currently. In our current Power Response Pilot Program, we do have a 10-KW minimum participation requirement, but that is just the program minimum. We do not have any average assumptions currently.

It is now 3:30PM and I do not see any more questions in the chat box. We will now conclude the webinar. A transcript of this webinar will be available on our website this Friday along with these slides. Written questions are due by this Friday as well. If you can please submit those written questions to me [taguirre@cleanpoweralliance.org](mailto:taguirre@cleanpoweralliance.org) with a copy to [contracting@cleanpoweralliance.org](mailto:contracting@cleanpoweralliance.org). We will be posting responses to those questions by next week April 27. Thank you all very much. Have a wonderful day.

(webinar concluded)