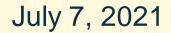


# **Request for Proposals Webinar**

# **Printing and Mailing Services**



## Agenda

- Housekeeping
- Introductions
- RFP Submittal Process
- CPA + Printing and Mailing Background
- 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. Questions will be addressed in the Q&A time at the end of the presentation.
- Additional questions should be emailed by July 9, 2021 4:00pm to ahang@cleanpoweralliance.org with a copy to contracting@cleanpoweralliance.org.
- This presentation is being recorded and a transcript will be available on CPA's website by 3:00 PM Friday, July 9.

# Introductions

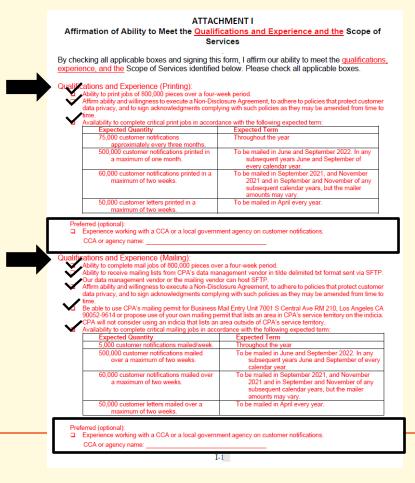
# RFP Submittal Process

CLEAN POWER ALLIANCE

### **Proposal Submittal Process**

- 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 <u>Addendum #1</u>:
  - 1. Completed affirmation of proposer's ability to meet the Qualifications and Experience and the Scope of Services. **See Attachment I.**
  - 2. Completed pricing form. See Attachment J.
  - 3. Proposer's completed Prospective Contractor References Form. See Attachment B.
  - 4. Any changes to CPA's Sample Contract. See Attachment D.

1. Completed affirmation of proposer's ability to meet the Qualifications and Experience and the Scope of Services. **See Attachment I.** 



**1. Completed affirmation of** proposer's ability to meet the Qualifications and **Experience and the Scope** of Services. See Attachment I.

**Printing Example** 

#### Scope of Services:

Printing Services: Printing Services, including but not limited to:

- Print up to 200,000 pieces per weekly batch.
- Print in formats including letters, postcards, bifold, or others, as CPA may determine from time to time
- Sourcing and printing on a percentage recycled paper, as decided by CPA or as revised by CPA from time to time Deliverables:
- Printing must be completed within the time specified in the Order Form (Attachment F).
- Vendor should submit a proof of each notice to CPA within 3 business days, if not sooner, for CPA review and approval.
- Mailing Services: Mailing Services, including but not limited to:
  - Review and provide a report of National Change of Address.
  - Mail notices, either via bulk and standard mailing, as directed by CPA or as revised from time to time.
  - Sign non-disclosure agreements for handling sensitive customer data, sign acknowledgments of CPA's privacy and confidentiality policies, renew such acknowledgments, if amended from time to time (see Attachment G). Deliverables:

- Report of National Change of Address must be provided upon request.
- Confirmation that the notices have been mailed must be sent to CPA within 1 business day of the mailing.
- NDAs and acknowledgments must be executed at the time of contract execution.
- Mail all move-in mailers within one week of receipt of the weekly mailing lists provided by CPA or its designee.

Printing and/or Mailing Services: Tracking and Reporting of Progress and Costs, including but not limited to:

- Track and report on progress of projects from initial proof and/or through delivery to post office.
- Track and report on printing costs and/or postage monthly with itemized breakdown. Deliverables:
- Report of progress of projects must be provided within 1 business day of request.
- Report on printing costs and/or postage must be provided on a monthly basis.

Printing and/or Mailing Services: Other ad hoc printing and/or mailing of program collateral, including but not limited to:

- · Printing and/or mailing of other notices, including but not limited to CPA program collateral. Deliverables:
- Report of progress of projects must be provided within 1 business day of request.
- Vendor will be expected to submit a proof of each notice to CPA within 3 business days, if not sooner.

Name (Print):

Signature:

Date:

**1. Completed affirmation of** proposer's ability to meet the Qualifications and **Experience and the Scope** of Services. See Attachment I.

Mailing Example

#### Scope of Services:

Printing Services: Printing Services, including but not limited to:

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Name (Print):

Signature:

Date:

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**Printing and Mailing** Example

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Name (Print):

Signature:

Date:

#### 2. Completed pricing form. Attachment J.

9					
Project	Format	Paper	Anticipated Quantities	Estimated Cost for Printing	Estimated Cost for Mailing
	<ul> <li>Full color</li> <li>Double-sided postcard</li> <li>6 x 10.5</li> </ul>	30% recycled 100- 130lb Silk cover			
	Printed address	10% recycled 100- 130lbsilk cover			
1	30,000 printed at once, but three batches addressed and mailed weekly to new move-in customers approximately 5,000/week.	100% recycled 100- 130lb silk cover	30,000		
	Full color     Single page one-sided	30% recycled 24 - 60 lb.			
2	letter • 8.5 x 11 • Regular #10 envelope with	10% recycled 24 – 60 lb.	50,000		
	printed address (please specify recycle content % used for quote)	100% recycled 24 – 60 lb.			
	Full color     Double-sided postcard	30% recycled 100- 130lb.silk cover			
3	6 x 10.5Printed address     500,000 must be printed within	10% recycled 100- 130lb silk cover	500,000		
	one month.	100% recycled 100- 130lb silk cover			
	Full color     double-sided postcard	30% recycled 100- 130lb silk cover			
4	6 x 10.5Printed address	10% recycled 100- 130lb silk cover	60,000		
		100% recycled 100- 130lb silk cover			
5	Pricing to produce one National Change of Address (NCOA) report. CFA expects to request NCOA reports up to 5 times per calendar year. If discounts are available for a larger volumes of reports, please describe the discount.				

#### 3. Proposer's completed Prospective Contractor References Form. See Attachment B.

1. Name of Firm	Address of Firm	Contact Person	Telephone # ( )	Fax # ( )	
Name or Contract No.	# of Years / Term of Contract		Type of Service	Dollar Amt.	
2. Name of Firm	Address of Firm	Contact Person	Telephone # ( )	Fax # ( )	
Name or Contract No.	# of Years / Term of Contract		Type of Service	Dollar Amt.	
3. Name of Firm	Address of Firm	Contact Person	Telephone # ( )	Fax # ( )	
Name or Contract No.	# of Years / Term of Contract		Type of Service	Dollar Amt.	

#### 4. Any changes to CPA's Sample Contract

Please submit any required changes to the Sample Contract. Attachment D.

#### ATTACHMENT D SAMPLE CONTRACT

Attached is a sample CPA Agreement that will be negotiated between the CPA and selected print and mailing services firm(s). Additional terms and conditions will be incorporated dependent on circumstances, including scope of services, the space selected, any tenant improvement or allowance, and other factors.

#### Clean Power Alliance of Southern California

This Professional Services Agreement (this "Agreement"), dated and effective as of [Month/Day, Year] (the "Effective Date"), is made by and between:

CLEAN POWER ALLIANCE OF SOUTHERN CALIFORNIA ("CPA"), and

[Legal Name of Contractor] ("Contractor").

CPA and Contractor are sometimes collectively referred to herein as the "Parties" and each individually as a "Party." In consideration of the terms of this Agreement, and for other good and valuable consideration, the Parties make the following acknowledgments and agreements:

RECITALS

WHEREAS, CPA may contract with a provider for print and mailing services

WHEREAS, CPA conducted a Request for Proposals ("RFP") and CPA selected Contractor because Contractor has the expertise and experience to provide the specified services to CPA and offered CPA the Best Value;

If no changes are required, then you do not need to submit the Sample Contract.

## **Proposal Submittal Process**

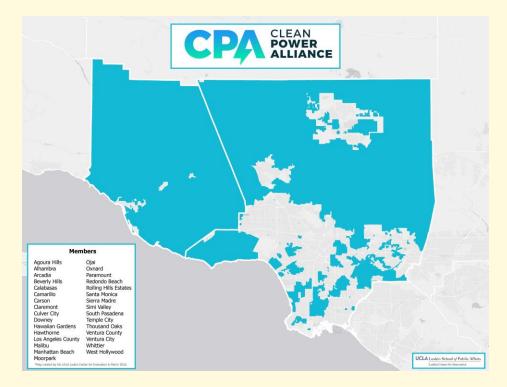
- Submissions MUST include the following components, as described in the RFP <u>Addendum #1</u>:
  - **1. Completed Attachment I** affirmation of proposer's ability to meet the Qualifications and Experience and the Scope of Services.
  - 2. Completed Attachment J pricing form.
  - **3. Completed Attachment B** Prospective Contractor References Form.
  - 4. Any changes to CPA's Sample Contract. See Attachment D.

# **CPA Background**

### **CPA Background**

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

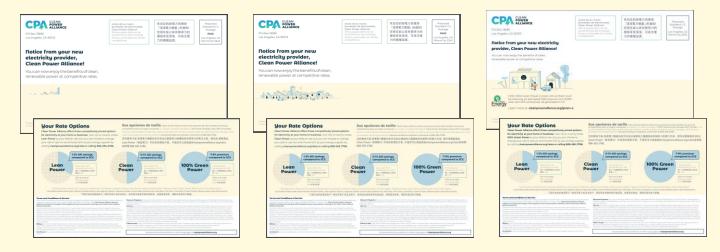
#### **CPA Service Territory**



# **Printing and** Mailing Background

### **Types of Mailers: Move-in Mailers**

- Print 3 versions ~ 3 months of inventory at once
- Mailings go out weekly ~ 5,000 total (three different types)



# **Types of Mailers: Compliance**

- Joint Rate Comparison Mailer
  - Arrive in mailboxes by July 1 (printing and mailing in May and June)
  - Four versions

     100,000; 20,000; 60,000;
     320,000.

DEN STORE							President Standard U.S. Brattage Internation CA Terms for 2144							
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oose the energy source and e plan that's right for you.														
is an annual mailer from Clean Power ance and Southern California Edison E that allows you to compare your rate pices and the sources of your energy and at the option that best suits you or your														
more information: call Clean Power ance at 888-585-3788 or visit anpoweralliance.org, or call SCE at														
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- Power Content Label
  - Arrive in mailboxes by October 1 (printing and mailing in August and September)
  - One version ~ 500,000

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Thanks to our 1 million cut           22 member communities,           to teaps gene ourse ourse valo build           1000         Reparatis warened           1100         Reparatis warened           12000         Reparatis warened           13000         Reparatis warened           130000         Reparatis warened           130000         Reparatis warened           140000         Reparatis warened           1200000         Reparatis same and experiments           12000000         Reparatis an event           Catatrons in rend         Catatrons in rend	end yoù a eaver have e renzy transulte energy 1ga emesues	
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# **Types of Mailers: Other Notices**

- Default Change
  - Between September and November
  - O Four different notices ~ 60,000 total

PO Box 13696 Los Angeles, CA 90013		PAID Los Angeles, CA Permit No 2342
A notice from Clean Power Alliance and the City of Malibu to Malibu customers.		
As of October 2020, you will start to receive 100% Green Power. You can change your rate at any time.		
Your Rate Options	C Table and real	74s parries
Ate comparisons for Lean Power Justiness customer.	Clean Pountr	100% Green Power
lellect commercial rates may be higher.		Make an adult on adu
Clean Power Allance has been the electricity provider for the only of Audita, and all other communities behalf of its customers. The Clean Power Allance provides given power which reduces all politions by funding the development of new clean energy options. What changes are coming? The Mallau Clip Caurcell voted in 2005 to adopt the Clean Power Allances which go the power and the magnet of autoring October 2016 to mode the impacts of	more than SCE's defax Residential customers Medical Baseline with M you're not already en and apply through SCE calling 800-708-5723 Want a different rate? I your rate at no cost by renewable energyl or C energyl. Compare your C	K Green Power costs 7-9% if rate for most customers, enclude in CARE, FRA or OT pay this permism if not olider, check your oligibility by visiting scencers/care or No problem! You can change selecting, Lean Power (gSK Jaan Power Allunce and SCE exelizione and SCE exelizione and SCE
climate change and air poliution. You can change your rate at any time by calling 888-585-3788 or visiting cleanpoweralliance org/rates.	For terms and condition Clean Power Alliance se cleanpoweralliance or	
	To learn more or c	hange your rate,

- Net Energy Metering
  - April ~50,000
  - Four different notices, variable data

#### CLEAN POWER

Locally powered energy innovation

-Dates -Customer Name:

<Mailing City>, <Mailing State>, <Mailing Zip>

Information Regarding Your Upcoming Annual Net Energy Metering True-Up

Dear Valued Customer

Thank you for generating local renewable powerl Clean Power Alliance (CPA) will be conducting the annual settlement, or "true-up," of your Net Energy Metering (NEM) account(s) during your April billing cycle. This letter describes the CPA NEM true-up process for your generation charges and creatists.

When your NEM account(s) was enrolled in CPA, it was also automatically enrolled in CPA's NEM program for your generation charges and credits. CPA is responsible for your monthly NEM electricity generation service (charges and credits, while Southern California Edison (SCE) is responsible income Wet monthly NEM electricity <u>delivers aervice</u> charges and credits. 'You are also aligible to recove Net Surplus Compensation for your average claim energy production from CPA metaded of SCE.

Annual true-up is a feature of the NEM program. CPA's true-up process for your NEM generation charges is similar to the true-up process SCE conducts for your NEM delivery service charges. The CPA NEM true-up process determines if you are eligible for a cash-out payment or credit, and is conducted as

- CPA will perform a NEM true-up of the most recent annual billing cycle (your "Relevant Period") each April. Note that your true-up may be for a relevant period of greater than 12 months, if this is your first true up.
- During the true-up process, CPA will determine if your account generated excess electricity and comprise you for that excess electricity at the current CPA Net Surplus concentration rate?, which is always 10% higher than SCE's most recently published rate.
   CPA will also conduct a settlement of any unused retail generation credits accumulated during
- CP-Y will also Contact a selectiment or any structure teal generation returns account of teals account of

Based on this true-up process, you will experience one of the following four scenarios

Scenario 1: You are eligible for net surplus compensation <u>only</u>. In this scenario you were a net producer during your relevant pariod, meaning that you produced more electricity than you used, and CPA will compensate you for that production at the current CPA Net Surplus Compensation rate.

Scenario 2. You are eligible for a generation credit refund only. In this scenario, though you were not an exproducer during your relevant period, you had unused NEM generation credits remaining at the end of the relevant period. CPA will refund to you those unused NEM generation credits, up to the total value of any generation changes you paid over the course of the relevant period.

<sup>1</sup> Note that your SCE NEM delivery charges and credits may be trued up on a different billing cycle <sup>2</sup> Up to a maximum of \$10,000\*

customerservice@tcleanpoweralliance.org + 888-585-3788 + cleanpoweralliance.org

<sup>1</sup> Continuent upon CPA receiving all necessary data to conduct true-up

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credit refund is \$100 or

of your net surplus carry those funds forward on monthly generation charges. month Relevant Period, which the amount of your cash out

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w.cleanpoweralliance.org/nem

id to bring clean, renewable

s at stable, competitive rates. sends your bill, and is out CPA and our NEM program

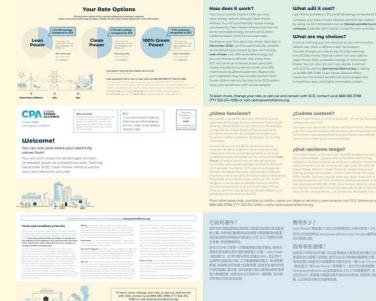
compleanpoweralliance or se contact SCE's Customer

eration credits at the end of

redits available to offset will receive a combined

### **Types of Mailers: Enrollment Notices**

- Enrollment notices: 4 mailed to each customer, 12 versions
- Ineligible letters: mailed to subsets of customers, 5 different versions, variable data



by valvo our full comparison tool at cleanpoweraliance.org

with SCE by visiting cleanpoweralliance.org or calling

## 10.果住不保险任何行動,会社运用派的方案就是你的電力方案。

#### 

er Name> Address Line 1> City>, <Mailing State>, <Mailing Zip>

#### Important Notification: Change to Your SCE Critical Peak Pricing (CPP) Participation

#### Dear Valued Customer

Starting with your first meter read date on or after **-Start**, your electricity account(s) will automatically enrolled in Clean Power Alliance service. Clean Power Alliance is a locally controlled energy provider that currently serve electricity to approximately I million customers in 32 communities across Los Angeles and Ventura Counties. Your communit gined Clean Power Alliance to give reidents and businesses nev clean entergy options.

Vour enrollment in Clean Power Allance will impact your participation in the SCE Critical Pask Princing (CPP) program. The CPP program is not currently available under Clean Power Allance's service. Onlies your choose to opt out of Clean Power Allance envice (see belook), your participation in the SCE CPP program is scheduled to end, and your accountly will be automatically transferred to our applicable net exchedule upon enrollment in Clean Power Allance and the Clean Power and the clean Power allance and the Clean Power and the clean Power program is scheduled to end, and your accountly will be accounted and the program is scheduled upon enrollment in Clean Power and the program of the program is scheduled upon enrollment in Clean Power and the participation of the program is a scheduled to end the program of the program of the program of the program is a scheduled on a schedule of the program is the program of the program of the program of the program is a scheduled on an enrollment in Clean Power and the program of the program Miance with your first meter read date on or after **<Start>**.

Note: If you have already opted out of Clean Power Alliance, please disregard this letter

Next Management Pricing with Case Never Allaces Clean Rowa Allaces in Sefforgi select commercial calotiments the option to enroll in our Peak Management Pricing (IMP) program, which is similar to SCTS CPP program. Our calotimes with choose Dip Common Sefforgi and Commercial Calotimes and the Sefforgi and receive Dip Dip Commercial Calotimes and the Sefforgi and the Sefforgi and the receive Dip Direction on the Dip Common Sefforgi and the Sefforgi and the Paragement excitculo y usep Center from the Sefforgi and the interested on the Sefforgi and Dip Dip Dip Sefforgi and S electricity usage between 4pm and 9pm a please visit cleanpoweralliance.org/pmp.

#### How does Clean Power Alliance service work?

How does clean Power Aslance service work r You will automatically begin receiving energy purchased by Clean Power Alliance that is competitively priced with SCE, your current energy suppler. SCE will continue to be What are my choices?

customerservice@cleanpoweralliance.org + 888-585-3788 + cleanpoweralliance.org

Sincerely, Account Services Clean Power Alliance Defaults, the Clean Por

ut and remain with SCE, please 985-3788 (TTY 323-214-1296) or

able energy at a 0-1% overall bill discount a

lance's benefits of local management and

## **Other Printing Needs**

- Annual Impact Report
- Program Marketing
  - •Both mailed notices and printed collateral for events



#### Saving 20% on your electric bill every month is easy.

Just visit CleanPowerAlliance.org/PowerShare to see if you qualify!

Clean Power Alliance is providing renewable energy to power your home at a discount! Enter your customer # from your bill, your name and zip code. If you qualify, you'll automatically save 20% off your SCE bill each month! You can register from your computer, tablet, smartphone or call 1-888-58-5788.







Es fácil ahorrar un 20% en su factura de electricidad cada mes.

(Clean Power Alliance está proporcionando energía renovable para su hogár con un descuento: legnaso su hiomero de Cleant de su factura, su nombre y obligo postal **y inscribirse hoyf** 

Visite CleanPowerAlliance.org/es/PowerShare o liame 1-888-585-3708.

每個月節省20%的 電費相單全額很容易。

 $1\times 2\times 2$  https://www.separateredlines.org/dr/processes/trace-3/ 7 M  $\oplus \oplus B$  II  $\oplus 3\times 2$  II

通常有力部型工具的包括体、量化可用生成进行的化力将每1 单人位 需要上的等户储器(Contramer #)、包括此本以及制路器能、加限包档 合理体、参考能力的公式特殊多数部件自动的信式加小目的有以处理器、 生物常数、整新生物因用、直接等-1496-06-3788。

# Webinar Q&A

Questions must be submitted via the text chat window.

#### **Q&A Process**

- All questions regarding this RFP are due by 4PM (pacific time) on July 9, 2021, in writing, to <u>ahang@cleanpoweralliance.org</u> with a copy to <u>contracting@cleanpoweralliance.org</u>.
- 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.

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

# **Thank You!**

