

# **Request for Proposals Webinar**

## **Printing and Mailing Services**

July 7, 2021

# 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](mailto:ahang@cleanpoweralliance.org) with a copy to [contracting@cleanpoweralliance.org](mailto: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**

# Proposal Submittal Process

- Proposals should be submitted by 4PM (pacific time) on July 23, 2021 to [ahang@cleanpoweralliance.org](mailto:ahang@cleanpoweralliance.org) with a copy to [contracting@cleanpoweralliance.org](mailto:contracting@cleanpoweralliance.org).
- The subjectline of your submittal should include “PROPOSAL FOR PRINT AND MAILING SERVICES”.
- Submissions **MUST** include the following components, as described in the RFP **Addendum #1**:
  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.**

# 4 Required Documents for Submission

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



### ATTACHMENT I Affirmation of Ability to Meet the Qualifications and Experience and the Scope of Services

By checking all applicable boxes and signing this form, I affirm our ability to meet the qualifications, experience, and the Scope of Services identified below. Please check all applicable boxes.

#### Qualifications and Experience (Printing):

- ☒ Ability to print jobs of 800,000 pieces over a four-week period.
- ☒ Affirm ability and willingness to execute a Non-Disclosure Agreement, to adhere to policies that protect customer data privacy, and to sign acknowledgments complying with such policies as they may be amended from time to time.
- ☒ Availability to complete critical print jobs in accordance with the following expected term:

Expected Quantity	Expected Term
75,000 customer notifications approximately every three months.	Throughout the year
500,000 customer notifications printed in a maximum of one month.	To be mailed in June and September 2022. In any subsequent years June and September of every calendar year.
60,000 customer notifications printed in a maximum of two weeks.	To be mailed in September 2021, and November 2021 and in September and November of any subsequent calendar years, but the mailer amounts may vary.
50,000 customer letters printed in a maximum of two weeks.	To be mailed in April every year.

Preferred (optional):

- ☐ Experience working with a CCA or a local government agency on customer notifications.
- CCA or agency name: \_\_\_\_\_



#### Qualifications and Experience (Mailing):

- ☒ Ability to complete mail jobs of 800,000 pieces over a four-week period.
- ☒ Ability to receive mailing lists from CPA's data management vendor in tld delimited txt format sent via SFTP.
- ☒ Our data management vendor or the mailing vendor can host SFTP.
- ☒ Affirm ability and willingness to execute a Non-Disclosure Agreement, to adhere to policies that protect customer data privacy, and to sign acknowledgments complying with such policies as they may be amended from time to time.
- ☒ 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.
- ☒ Availability to complete critical mailing jobs in accordance with the following expected term:

Expected Quantity	Expected Term
5,000 customer notifications mailed/week.	Throughout the year
500,000 customer notifications mailed over a maximum of two weeks.	To be mailed in June and September 2022. In any subsequent years June and September of every calendar year.
60,000 customer notifications mailed over a maximum of two weeks.	To be mailed in September 2021, and November 2021 and in September and November of any subsequent calendar years, but the mailer amounts may vary.
50,000 customer letters mailed over a maximum of two weeks.	To be mailed in April every year.

Preferred (optional):

- ☐ Experience working with a CCA or a local government agency on customer notifications.
- CCA or agency name: \_\_\_\_\_

# 4 Required Documents for Submission

## 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: \_\_\_\_\_



# 4 Required Documents for Submission

## 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:

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Name (Print): \_\_\_\_\_ Signature: \_\_\_\_\_

Date: \_\_\_\_\_

# 4 Required Documents for Submission

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

### Printing and Mailing Example

#### Scope of Services:



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##### Deliverables:



- Report of progress of projects must be provided within 1 business day of request.
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Name (Print): \_\_\_\_\_ Signature: \_\_\_\_\_

Date: \_\_\_\_\_

# 4 Required Documents for Submission

## 2. Completed pricing form. Attachment J.

Project	Format	Paper	Anticipated Quantities	Estimated Cost for Printing	Estimated Cost for Mailing
1	<ul style="list-style-type: none"> <li>Full color</li> <li>Double-sided postcard</li> <li>6 x 10.5</li> <li>Printed address</li> </ul> <i>30,000 printed at once, but three batches addressed and mailed weekly to new move-in customers approximately 5,000/week.</i>	30% recycled 100-130lb Silk cover	30,000		
		10% recycled 100-130lbsilk cover			
		100% recycled 100-130lb silk cover			
2	<ul style="list-style-type: none"> <li>Full color</li> <li>Single page one-sided letter</li> <li>8.5 x 11</li> <li>Regular #10 envelope with printed address (please specify recycle content % used for quote)</li> </ul>	30% recycled 24 - 60 lb.	50,000		
		10% recycled 24 – 60 lb.			
		100% recycled 24 – 60 lb.			
3	<ul style="list-style-type: none"> <li>Full color</li> <li>Double-sided postcard</li> <li>6 x 10.5Printed address</li> </ul> <i>500,000 must be printed within one month.</i>	30% recycled 100-130lb.silk cover	500,000		
		10% recycled 100-130lb silk cover			
		100% recycled 100-130lb silk cover			
4	<ul style="list-style-type: none"> <li>Full color</li> <li>double-sided postcard</li> <li>6 x 10.5Printed address</li> </ul>	30% recycled 100-130lb silk cover	60,000		
		10% recycled 100-130lb silk cover			
		100% recycled 100-130lb silk cover			
5	Pricing to produce one National Change of Address (NCOA) report. CPA 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.				

# 4 Required Documents for Submission

## 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 Required Documents for Submission

### 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 **Addendum #1**:
  - 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.**

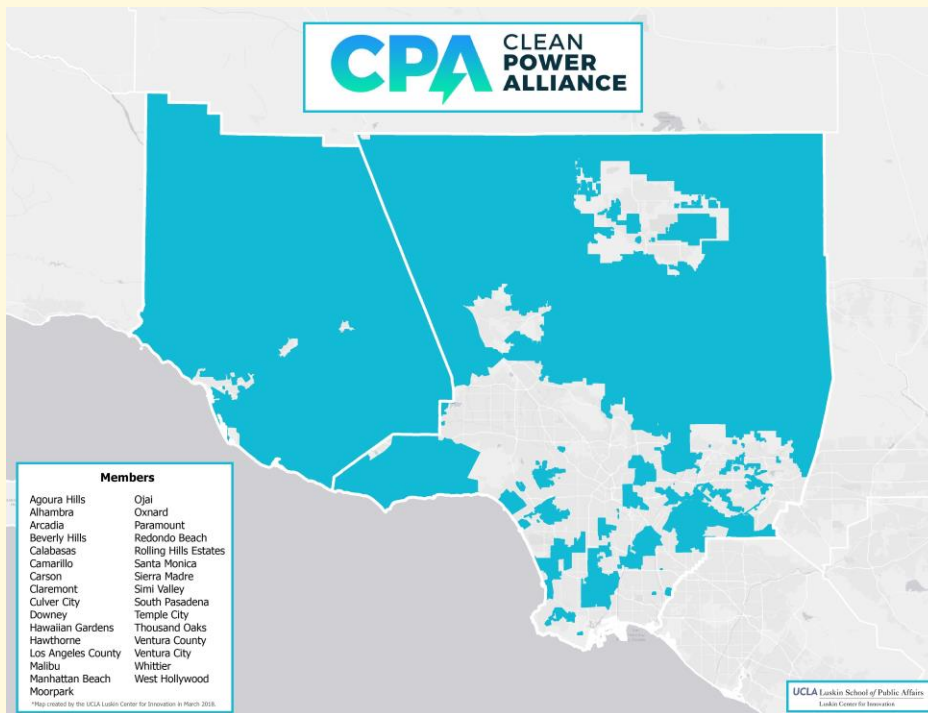
# **CPA Background**

# 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**

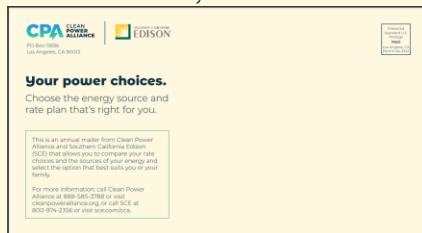
- Print 3 versions ~ 3 months of inventory at once
- Mailings go out weekly ~ 5,000 total (three different types)



## Types of Mailers: Compliance

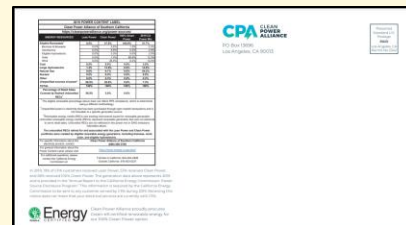
- Joint Rate Comparison Mailer

- *Arrive in mailboxes by July 1 (printing and mailing in May and June)*
- *Four versions  
~100,000; 20,000; 60,000; 320,000.*



- Power Content Label

- *Arrive in mailboxes by October 1 (printing and mailing in August and September)*
- *One version ~ 500,000*

[illegible]

Thanks to our 1 million customers,  
32 member communities, and YOU  
for helping grow our economy and build a cleaner future.

**The Power of Together.**

- 1,300 Megawatts new renewable energy
- 714 Megawatts new battery storage
- 2,500 Good paying jobs
- 293,000 Customers receiving 100% renewable energy
- 890,000 Metric tons of greenhouse gas emissions avoided in 2019
- \$2 million in COVID-19 relief bill credits for 60,000+ customers in need

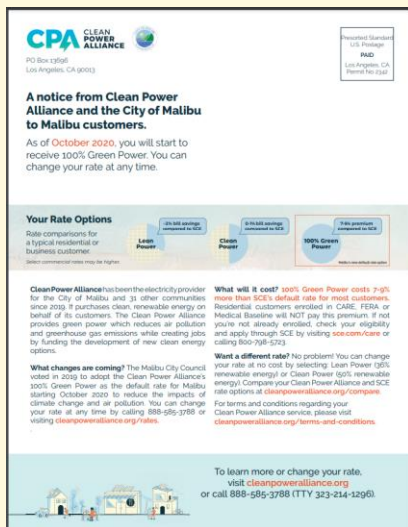
Learn more at [cleanelectricalliance.org](http://cleanelectricalliance.org) or 888-585-3788.

**CPCA** CLEAN  
POWER  
ALLIANCE

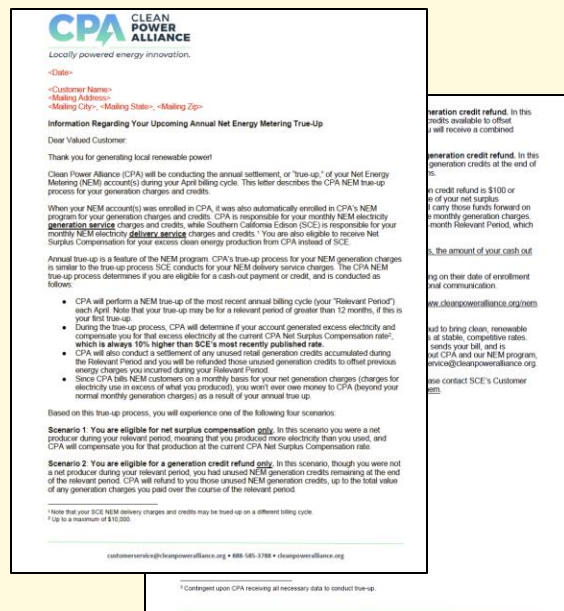
Watch Us [YouTube](https://www.youtube.com/channel/UC8v33333333333333333333) [Facebook](https://www.facebook.com/cleanpoweralliance) [Instagram](https://www.instagram.com/cleanpoweralliance)

# Types of Mailers: Other Notices

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



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



**CLEAN POWER ALLIANCE**

- 如需瞭解詳情、更改方案、或退出服務並回到SCE, 請致電888-585-3768(TTY 323-214-1296) 或瀏覽 [clearpoweraffinity.org](http://clearpoweraffinity.org)與我們聯繫

## Terms and Conditions of Service

These Terms and Conditions apply to all services provided by us to you. By using our services, you agree to these Terms and Conditions. If you do not agree to these Terms and Conditions, you should not use our services. We reserve the right to modify these Terms and Conditions at any time without notice. We encourage you to review these Terms and Conditions regularly.

**1. Definitions**

**1.1 "We", "Us", "Our":** refers to the company.

**1.2 "You", "Your":** refers to the user.

**1.3 "Service":** refers to the services provided by us to you.

**1.4 "Account":** refers to an account created by you with us.

**1.5 "Data":** refers to any information collected by us from you.

**1.6 "Third Party":** refers to any person or entity other than us or you.

**1.7 "Intellectual Property":** refers to any rights in inventions, designs, or other creations of the mind.

**1.8 "Force Majeure":** refers to any event or circumstance beyond our control.

**1.9 "Entire Agreement":** refers to these Terms and Conditions.

**1.10 "Governing Law":** refers to the law of the state of California.

**1.11 "Dispute Resolution":** refers to the arbitration process.

**1.12 "Assignment":** refers to the transfer of rights or obligations.

**1.13 "Severability":** refers to the principle that if one part of a contract is invalid, the rest remains valid.

**1.14 "Waiver":** refers to the voluntary relinquishment of a right.

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**1.120 "Assignment":** refers to the transfer of rights or obligations.

**1.121 "Severability":** refers to the principle that if one part of a contract is invalid, the rest remains valid.

**1.122 "Waiver":** refers to the voluntary relinquishment of a right.

**1.123 "Notices":** refers to any communication sent by us to you.

**1.124 "Construction":** refers to the interpretation of the contract.

**1.125 "Assignment of Rights":** refers to the transfer of rights to a third party.

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**1.13**

[illegible]

Sincerely,  
Account Services  
Clean Power Alliance

# Other Printing Needs

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



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\*Power Share savings offer for the energy customer is approximately 20% off your electric bill. To qualify, you must be a residential customer in the Los Angeles area. The program is subject to change without notice. The Clean Power Alliance is not responsible for any errors or omissions. The Clean Power Alliance is not responsible for any errors or omissions. The Clean Power Alliance is not responsible for any errors or omissions.



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只需輸入您的客戶編號（Customer #）、姓名和郵政編碼，即可查看您是否符合資格。請立即註冊！

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# **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 [ahang@cleanpoweralliance.org](mailto:ahang@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 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

## **Printing and Mailing Services RFP**

# **Thank You!**

