



## REQUEST FOR PROPOSALS (RFP)

### FOR

## STREET TEAMS SUPPORT AND ACTIVATION SERVICES

### 1. OBJECTIVE

Clean Power Alliance of Southern California (“CPA”) is seeking proposals (“Proposals”) from qualified and experienced contractors (individually, a “Proposer” and collectively, “Proposers”) to provide street teams support and activation services to enhance Clean Power Alliance’s presence at community events.

### 2. PROJECT BACKGROUND

CPA is a Community Choice Aggregator (“CCA”), established as a Joint Powers Authority, made up of 35 local agencies across Los Angeles and Ventura Counties (CPA’s member agencies are set forth in Attachment C). These agencies have banded together to provide cleaner electricity at competitive rates, offering a choice of electricity service providers to approximately three million residents and businesses through over one million customer accounts in Southern California.

CPA is seeking to partner with an agency specializing in street team execution that can provide multilingual staffing support and innovative strategies. The goal of this RFP is to secure services that will help educate CPA’s customer base about what CPA does, foster trust and excitement in CPA’s mission, and boost customer’s enrollment in various CPA programs.

### 3. QUALIFICATIONS AND EXPERIENCE

A qualified Proposer should have the following minimum qualifications and experience:

- The selected agency must demonstrate experience in successfully educating and engaging diverse communities in Southern California through in-person events.
- The selected agency must demonstrate experience providing highly effective street teams capable of understanding and discussing clean energy topics and programs; engaging with members of the public to build brand trust and increase brand visibility; driving foot traffic at events; and ultimately achieving measurable goals.
- The selected agency must demonstrate an understanding of the specific demographics, socio-economic factors, and cultural dynamics of Southern California communities.

- The selected agency must demonstrate multilingual proficiency, specifically in Spanish and Mandarin. The selected agency must be able to deploy a diverse and multilingual street team to ensure effective communication with residents from various cultural backgrounds.
- The selected agency must demonstrate the ability to adapt strategies based on the unique characteristics of different communities and different outreach events within Southern California, under the direction of CPA staff.

#### **4. SCOPE OF SERVICES**

##### **4.1. Scope of Work**

A detailed description of the Scope of Work for street teams support and activation Services is contained in Attachment A (“Contemplated Scope of Services”).

##### **4.2. Term of Work**

Services under this RFP are expected to commence on June 17, 2024, and continue until June 16, 2025 (“Initial Term”). At the end of the Initial Term, the Parties may renew this Agreement for two (2) successive one (1) year terms for a maximum of two years (each, a “Renewal Term”).

#### **5. PRICING**

**5.1.** Proposer must (a) describe in detail the compensation structure to meet the Scope of Services specified in **Attachment A**; (b) describe in detail any fees or charges for travel, telephone calls, and any other expenses anticipated to be incurred, which shall be separately billed (NOTE: any compensation for such fees or expenses shall be at-cost, i.e., no margin, or additional fees shall be charged); and (c) describe in detail any discounts or downward adjustments that are available and the conditions for such discounts. The compensation structure can include (i) fixed price or (ii) hourly rates, in which case the Proposer must specify the rate increments for each professional who will or is anticipated to perform services outlined herein, and a not-to-exceed amount.

**5.2.** CPA’s budget for street teams support and activation Services during the Initial Term is anticipated to be \$60,000 but is subject to change at CPA’s discretion.

#### **6. RFP PROCESS**

##### **6.1. RFP Schedule**

The timetable for this RFP is as follows:

| Description                        | Date   |
|------------------------------------|--|
| Release of RFP                     | April 17, 2024                                 |
| Deadline for Written Questions     | April 22, 2024                                 |
| Responses to Questions Provided    | April 26, 2024                                 |
| <b>RFP Proposals Due</b>           | <b>May 9, 2024 (by 4:00 p.m. Pacific Time)</b> |
| Evaluation of Proposals            | May 9-22, 2024                                 |
| Interviews (if needed)             | May 23-31, 2024                                |
| Notice of Intent to Award Provided | June 3, 2024                                   |
| Contract Negotiations              | June 3-14, 2024                                |
| Execution of Contract              | June 14, 2024                                  |
| Commencement of Work               | June 17, 2024                                  |

## 6.2. Proposer Questions and CPA Responses

Potential proposers may submit questions regarding this RFP by sending an email to [contracting@cleanpoweralliance.org](mailto:contracting@cleanpoweralliance.org) with a copy to [ggoodhill@cleanpoweralliance.org](mailto:ggoodhill@cleanpoweralliance.org). All questions must be received by 4:00pm (Pacific Time) on April 22, 2024. When submitting questions, please specify which section of the RFP you are referencing and quote the language that prompted the question. CPA will post responses to all of the questions received for this solicitation to CPA's website at: <https://cleanpoweralliance.org/contracting-opportunities/> on April 26, 2024.

CPA reserves the right to group similar questions when providing answers. Questions may address issues or concerns that the evaluation criteria and/or business requirements would unfairly disadvantage providers or, due to unclear instructions, may result in CPA not receiving the best possible responses from provider.

## 6.3. Proposal Submission Deadline

A proposal should be submitted by email to [contracting@cleanpoweralliance.org](mailto:contracting@cleanpoweralliance.org) by 4:00 pm on May 9, 2024. Please include "PROPOSAL FOR STREET TEAMS SUPPORT AND ACTIVATION SERVICES" in the email subject line.

It is the sole responsibility of the submitting Proposer to ensure that its proposal is received before the submission deadline. Submitting Proposer shall bear all risks associated with delays in delivery. Any proposals received after the scheduled closing date and time for receipt of proposals may not be accepted.

## 6.4. Proposal Evaluation Criteria

Proposals will be evaluated in accordance with the following evaluation criteria:

| Evaluation Criteria  | Criteria Weight |
|--|-----------------|
| Proposer’s qualifications and experience (see Section 3).  | 33%             |
| Proposer’s ability to provide the Contemplated Scope of Services identified in <b>Attachment A</b> . | 33%             |
| Proposer’s Pricing (see Section 5)   | 34%             |

**6.5. Evaluation Process**

CPA will evaluate the proposals pursuant to the criteria specified in Section 6.4 above. CPA may select one particular Proposer or select a combination of Proposers (with or without interviews); or conduct interviews with a “short list” of Proposers, consisting of those Proposers reasonably likely, in the opinion of CPA, to be awarded the contract. Any interview may include discussions about services offered, conflicts of interests with other clients, or fees/compensation amount or structure. Interviews may take place through written correspondence, telephone or video conference, and/or face-to-face interviews, at CPA’s sole discretion.

CPA reserves the right not to convene interviews or discussions, and to make an award on the basis of initial proposals received. References may be contacted at any point in the evaluation process.

After a Proposer has been selected, CPA will negotiate a contract for execution. If a satisfactory contract cannot be negotiated, CPA may, at its sole discretion, begin contract negotiations with the next qualified Proposer who submitted a proposal, as determined by CPA. Proposers are further notified that CPA may disqualify any Proposer with whom CPA cannot satisfactorily negotiate a contract. A contract may be presented to CPA’s Board of Directors for approval.

**7. PROPOSAL REQUIREMENTS**

**7.1. Proposals shall include the following components:**

7.1.1. Proposer’s qualifications and experience with the elements specified in Section 3 (Qualifications and Experience). Proposer must provide qualifications for all team members, including the principal, company official(s), and other personnel who Proposer anticipates will be assigned to work on behalf of CPA. This requirement includes, but is not limited to, Proposer’s anticipated subcontractors or teaming partners.

7.1.2. Proposer’s explanation for how it plans to meet Task and Deliverables specified in Attachment A (which will be attached as the scope of work to the final agreement as Exhibit A). This section must include:

- 7.1.2.1. A list of the Proposer's planned project team, who will be assigned to work on behalf of CPA, and an explanation for each project team member's role and responsibility.
  - 7.1.2.2. A list of subcontractors, if any, and their respective roles and responsibilities separated by task.
  - 7.1.2.3. Proposer must provide its pricing proposal, including the information required in Section 5, "Pricing," above. Proposer should describe any fixed fees or hourly billing rates, fees, or other compensation that Proposer may seek from CPA for services, inclusive of staff time, equipment, materials, travel, administrative/clerical, overhead and other out-of-pocket expenses, if applicable to this contract.
  - 7.1.2.4. If a teaming arrangement is being proposed, teaming partner or subcontractor costs should be broken out separately.
- 7.1.3. Proposer's completed Prospective Contractor References Form. See **Attachment B**.
- 7.1.4. Any required changes to CPA's Pro Forma Contract. See **Attachment D**.
- 7.1.5. Proposer's completed Campaign Contribution Form. See **Attachment E**.

## **8. RESERVATION OF RIGHTS**

This RFP is a solicitation for proposals only and is not intended as an offer to enter into a contract or as a promise to engage in any formal competitive bidding or negotiations. CPA may, at its sole discretion, accept or reject any or all proposals submitted in response to this RFP. CPA also may, in its sole discretion, make no award for this RFP or cancel this RFP in its entirety. In addition, CPA may, at its sole discretion, only elect to proceed with contract negotiations for some of the services included in the proposal. CPA further reserves its right to waive minor errors and omissions in proposals, request additional information or revisions to offers, and to negotiate with any or all Proposers.

CPA shall not be liable for any costs incurred by the Proposer in connection with the preparation and submission of any proposal. CPA reserves the right to waive inconsequential disparities in a submitted proposal. CPA has the right to amend the RFP, in whole or in part, by written addendum, at any time. CPA is responsible only for that which is expressly stated in the solicitation document and any authorized written addenda. Such addendum shall be made available to each person or organization which CPA records indicate has received this RFP. Should such addendum require additional information not previously requested, failure to address the requirements of such addendum may result in the proposal being found non-responsive and not being

considered, as determined in the sole discretion of CPA. CPA is not responsible for and shall not be bound by any representations otherwise made by any individual acting or purporting to act on its behalf. CPA has the right to reissue the RFP at a future date.

## **9. CONFIDENTIALITY AND PUBLIC RECORDS**

Responses to this RFP shall become the exclusive property of CPA. CPA is subject to the California Public Records Act ("CPRA"). The recommended Proposer's proposal will become a matter of public record when contract negotiations are complete and when an agreement is executed by CPA. Exceptions to disclosure may be available to those parts or portions of proposals that are justifiably and reasonably defined as business or trade secrets, and plainly marked by the Proposer as "Trade Secret", "Confidential", or "Proprietary". CPA shall not, in any way, be liable or responsible for the disclosure of any such record or any parts thereof, if disclosure is required or permitted under the CPRA or otherwise by law.

**In the event CPA receives a CPRA request for any of the aforementioned documents, information, books, records, and/or contents of a proposal marked "Confidential", "Trade Secrets", or "Proprietary", Proposer agrees to defend and indemnify CPA from all costs and expenses, including reasonable attorneys' fees, incurred in connection with any action, proceedings, or liability arising in connection with the CPRA request.**

A blanket statement of confidentiality or the marking of each page of the proposal as confidential shall not be deemed sufficient notice of a CPRA exemption, and a Proposer who indiscriminately and without justification identifies most or all of its proposal as exempt from disclosure or submits a redacted copy may be deemed non-responsive.

## **10. CONFLICTS OF INTEREST**

CPA is governed by the Political Reform Act, Government Code Section 1090, Government Code Section 84308, and other requirements governing conflicts, campaign contributions, and gifts. Proposers are required to review all applicable conflict of interest laws. In addition, CPA has adopted policies governing bidder conduct. Proposers are advised to review all policies, including the Vendor Communication Policy available here: <https://cleanpoweralliance.org/key-documents/>.

You may not contact or receive information outside of this RFP process. If it is discovered that the Proposer contacted and received information from anyone other than the email address specified above and under the process specified herein regarding this solicitation, CPA may, in its sole discretion, disqualify your proposal from further consideration.

All contact regarding this RFP or any matter relating thereto must be in writing and may be emailed to [contracting@cleanpoweralliance.org](mailto:contracting@cleanpoweralliance.org) with a copy to [ggoodhill@cleanpoweralliance.org](mailto:ggoodhill@cleanpoweralliance.org).

## **11. PROTEST PROCESS**

Any Proposer who wishes to submit a written protest must do so by 12 p.m. (Pacific) on June 6, 2024, unless this date is further amended through an Addendum. Any written protest must contain a full and complete statement specifying in detail the grounds of the protest and the facts in support thereof. The written protest must be e-mailed to [contracting@cleanpoweralliance.org](mailto:contracting@cleanpoweralliance.org).

### **ATTACHMENTS**

**Attachment A** – Scope of Services

**Attachment B** – Prospective Contractor References

**Attachment C** – CPA Member Agencies

**Attachment D** – CPA Sample Contract

**Attachment E** – Campaign Contribution Form (Government Code 84308)

**ATTACHMENT A**  
**SCOPE OF SERVICES**

The principal responsibility of the selected Proposer(s) is to provide a full range of street teams support and activation services that include, but are not limited to, the following:

**Street Team Activation and Booth Setup**

Provide a full range of street teams support and activation services to enhance Clean Power Alliance's presence at community events.

1. Strategically deploy highly trained and enthusiastic brand ambassadors at specifically selected CPA events.
  - 1.1. Brand ambassadors should be bilingual in English and Spanish or English and Mandarin. CPA staff will provide materials in the required languages.
  - 1.2. Brand ambassadors should have experience educating members of the public on programs, public services, clean energy, or similar topics.
2. Provide transportation for materials to and from events, including, but not limited to, a 10x10 tent, tables, chairs, signage, promotional giveaways, and collateral materials.
3. Facilitate the set up at events with supervising CPA staff.
4. Engage with the public and assist CPA staff with interactive experiences to create brand awareness and educate community members about Clean Power Alliance's clean energy initiatives, benefits, and available programs.
5. Distribute promotional materials and provide overview information on programs and giveaways.
6. Collaborate with internal CPA teams and external partners aligning street team efforts with broader organizational goals.
7. Ensure that all street team activities adhere to CPA's ethical standards and comply with relevant California laws and regulations.
8. Report a recap of event day and establish mechanisms for collecting feedback from community members to continuously improve outreach strategies and address concerns.

Anticipated Deliverables:

1. An event schedule approved by CPA staff outlining the programs, tactics, and timeline.
2. Clear objectives and key performance indicators (KPIs) for measuring the success of the outreach efforts.
3. Facilitation of setup and tear down of event booth, and with general coordination at CPA community events as directed by CPA.
4. Deployment of ambassadors with two (2) bilingual Spanish speaking and two (2) bilingual Mandarin speaking brand ambassadors.



5. On-site event support to assist CPA staff in engagement with community members, including providing general programmatic information, assisting with booth giveaways, taking pictures of CPA staff's engagement with community members, and assisting with interactive opportunities.
6. Coordination and collaboration with CPA staff to transport materials, promotional items, tables, chairs, and tents as needed between the CPA office and communities' events in Los Angeles and Ventura counties.
7. Demonstration of command of talking points supplied by CPA; comprehension of CPA's fundamental mission, event goals, and education related to renewable energy and renewable energy program opportunities for community members, and outreach objectives for street teams.
8. One (1) page report with feedback mechanisms in place to recap after each event takes place. The report should capture highlights, issues, and recommendations for improvement if possible, including data driven adjustments.
9. Pictures of the CPA booth, general event photos, and pictures of CPA staff engaging with community members. Photos should be emailed to CPA at the end of the event.

#### Timeline

1. An event schedule will be provided at the initial start of the program and be reviewed with CPA staff for approval.
2. Events will be ongoing over the duration of the program, as directed by CPA.
3. Reports will be issued two (2) to three (3) workdays after an event has taken place.

**ATTACHMENT B**  
**PROSPECTIVE CONTRACTOR REFERENCES**

Contractor's Name: \_\_\_\_\_

List three (3) References where the same or similar scope of services were provided in order to meet the Minimum Requirements stated in this solicitation.

|                        |                               |                |                              |                      |
|------------------------|-------------------------------|----------------|------------------------------|----------------------|
| <b>1. Name of Firm</b> | <b>Address of</b>             | <b>Contact</b> | <b>Telephone #</b><br>(    ) | <b>Fax</b><br>(    ) |
| Name or Contract No.   | # of Years / Term of Contract |                | Type of Service              | Dollar Amt.          |
| <b>2. Name of Firm</b> | <b>Address of</b>             | <b>Contact</b> | <b>Telephone #</b><br>(    ) | <b>Fax</b><br>(    ) |
| Name or Contract No.   | # of Years / Term of Contract |                | Type of Service              | Dollar Amt.          |
| <b>3. Name of Firm</b> | <b>Address of</b>             | <b>Contact</b> | <b>Telephone #</b><br>(    ) | <b>Fax</b><br>(    ) |
| Name or Contract No.   | # of Years / Term of Contract |                | Type of Service              | Dollar Amt.          |

**ATTACHMENT C**  
**LIST OF CPA MEMBER AGENCIES**

| <b>County/City</b>        |
|---------------------------|
| 1. Agoura Hills           |
| 2. Alhambra               |
| 3. Arcadia                |
| 4. Beverly Hills          |
| 5. Calabasas              |
| 6. Camarillo              |
| 7. Carson                 |
| 8. Claremont              |
| 9. Culver City            |
| 10. Downey                |
| 11. Hawaiian Gardens      |
| 12. Hawthorne             |
| 13. Hermosa Beach         |
| 14. LA County             |
| 15. Malibu                |
| 16. Manhattan Beach       |
| 17. Monrovia              |
| 18. Moorpark              |
| 19. Ojai                  |
| 20. Oxnard                |
| 21. Paramount             |
| 22. Redondo Beach         |
| 23. Rolling Hills Estates |
| 24. Santa Monica          |
| 25. Santa Paula           |
| 26. Sierra Madre          |
| 27. Simi Valley           |
| 28. South Pasadena        |
| 29. Temple City           |
| 30. Thousand Oaks         |
| 31. Ventura City          |
| 32. Ventura County        |
| 33. West Hollywood        |
| 34. Westlake Village      |
| 35. Whittier              |

**ATTACHMENT D**  
**SAMPLE CONTRACT**

Attached is a sample CPA Agreement that will be negotiated between the CPA and the selected Proposer. 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**

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This Professional Services Agreement (this "Agreement"), dated and effective as of [DATE] (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 street teams support and activation services;

**WHEREAS**, CPA conducted 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;

**WHEREAS**, Contractor desires to provide these specified services to CPA;

**WHEREAS**, the purpose of this Agreement is to set forth the terms and conditions upon which Contractor shall provide services to CPA;

**NOW, THEREFORE**, it is agreed based on the consideration set forth below by the Parties to this Agreement as follows:

**AGREEMENT**

**1. Definitions**

- a. The definition of "Confidential Information" is set forth in paragraph 10.b. of this Agreement.
- b. "CPA Data" shall mean all data gathered or created by Contractor in the performance of the Services pursuant to this Agreement, including any customer or customer-related data.

- c. "CPA Information" shall mean all confidential, proprietary, or sensitive information provided by CPA to Contractor in connection with this Agreement.
- d. "CPA Materials" shall mean all finished or unfinished content, writing and design materials but not limited to messaging, design, personalization, or other materials, reports, plans, studies, documents and other writings prepared by Contractor, its officers, employees and agents for CPA for the performance of, the purpose of, or in the course of implementing this Agreement.
- e. "CPA Product" includes collectively CPA Data, CPA Information, and CPA Materials.
- f. "Services" shall mean the scope of work Contractor provides to CPA as specified in Exhibit A.

## **2. Exhibits and Attachments**

The following exhibits and attachments are attached to this Agreement and incorporated into this Agreement by this reference:

Exhibit A – Scope of Work

Exhibit B – [Contractor's Workplan and Schedule] [Reserved]

Exhibit C – Compensation

Exhibit D – [Reserved]

Should a conflict arise between language in the body of this Agreement and any exhibit or attachment to this Agreement, the language in the body of this Agreement controls, followed by Exhibit A, B, C, and D in that order.

## **3. Services to be Performed by Contractor**

In consideration of the payments set forth in this Agreement and in Exhibit C, Contractor shall perform services for CPA in accordance with the terms, conditions, and specifications set forth in this Agreement and in [Exhibits A and B] ("Services").

## **4. Compensation**

CPA agrees to compensate Contractor as specified in Exhibit C:

- a. In consideration of the Services provided by Contractor in accordance with all terms, conditions and specifications set forth in this Agreement and Exhibit A [and Exhibit B], CPA shall make payment to Contractor on a [time and materials, not-to-exceed, or fixed fee] basis and in the manner specified in Exhibit C.
- b. Unless otherwise indicated in Exhibit C, Contractor shall invoice CPA monthly to [accountspayable@cleanpoweralliance.org](mailto:accountspayable@cleanpoweralliance.org) for all compensation related to Services performed during the previous month. Payments shall be due within

fifteen (15) calendar days after the date the invoice is submitted to CPA at the specified email address. All payments must be made in U.S. dollars.

## **5. Term**

Subject to compliance with all terms and conditions of this Agreement, the term of this Agreement shall be one (1) year from the Effective Date ("Initial Term"). At the end of the Initial Term, the Parties may renew this Agreement for two successive one (1) year terms for a maximum of two additional years (each, a "Renewal Term"), unless either Party provides ninety (90) days prior written notice of its intent not to renew the term of the Agreement ("Renewal Notice").

## **6. Termination**

- a. Termination for Convenience. CPA may terminate the Agreement in accordance with this paragraph in whole, or from time to time in part, whenever CPA determines that termination is in CPA's best interests. A termination for convenience, in part or in whole, shall take effect by CPA delivering to Contractor, at least thirty (30) calendar days prior to the effective date of the termination or prior to a Notice of Termination specifying the extent to which performance of the Services under the Agreement is terminated.

If the termination for convenience is partial, Contractor may submit to CPA a request in writing for equitable adjustment of price or prices specified in the Agreement relating to the portion of this Agreement which is not terminated. CPA may, but shall not be required to, agree on any such equitable adjustment. Nothing contained herein shall limit the right of CPA and Contractor to agree upon amount or amounts to be paid to Contractor for completing the continued portion of the Agreement when the Agreement does not contain an established price for the continued portion. Nothing contained herein shall limit CPA's rights and remedies at law.

- b. Termination for Default. If Contractor fails to provide in any manner the Services required under this Agreement, otherwise fails to comply with the terms of this Agreement, or violates any ordinance, regulation or law which applies to its performance herein and such default continues uncured for thirty (30) calendar days after written notice is given to Contractor, CPA may terminate this Agreement by giving five (5) business days' written notice. If Contractor requires more than thirty (30) calendar days to cure, then CPA may, at its sole discretion, authorize additional time as may reasonably be required to effect such cure provided that Contractor diligently and continuously pursues such cure.
- c. Termination for Lack of Third-Party Funding. CPA may terminate this Agreement if funding for this Agreement is reduced or eliminated by a third-party funding source.
- d. Effect of Termination. Upon the effective date of expiration or termination of this Agreement: (i) Contractor may immediately cease providing Services in its entirety or if a termination to a part of the Agreement, cease providing the Services that have been terminated; (ii) any and all payment obligations of CPA under this Agreement will become due immediately except any equitable adjustment pursuant to Paragraph 5(a); (iii) promptly transfer title and deliver to CPA all CPA Product or any work in progress pursuant to this Agreement; and (iv) each Party

will promptly either return or destroy (as directed by the other Party) all Confidential Information of the other Party in its possession as well as any other materials or information of the other Party in its possession.

Upon such expiration or termination, and upon request of CPA, Contractor shall reasonably cooperate with CPA to ensure a prompt and efficient transfer of all data, documents and other materials to CPA in a manner such as to minimize the impact of expiration or termination on CPA's customers.

## **7. Contract Materials**

CPA owns all right, title and interest in and to all CPA Materials and CPA Data. Upon the expiration of this Agreement, or in the event of termination, CPA Materials and all CPA Information, in whatever form and in any state of completion, shall remain the property of CPA and shall be promptly returned to CPA. Upon termination, Contractor may make and retain a copy of such CPA Materials if required by law or pursuant to the Contractor's reasonable document retention or destruction policies.

## **8. Payments of Permits/Licenses**

Contractor bears responsibility to obtain any license, permit, or approval required for it to provide the Services to be performed under this Agreement at Contractor's own expense prior to commencement of the Services.

## **9. No Recourse against Constituent Members**

CPA is organized as a Joint Powers Authority in accordance with the Joint Exercise of Powers Act of the State of California (Government Code Section 6500, et seq.) pursuant to the Joint Powers Agreement and is a public entity separate from its constituent members. CPA shall solely be responsible for all debts, obligations and liabilities accruing and arising out of this Agreement. Contractor shall have no rights and shall not make any claims, take any actions or assert any remedies against any of CPA's constituent members in connection with this Agreement.

## **10. Confidential Information**

- a. Duty to Maintain Confidentiality. Contractor agrees that Contractor will hold all Confidential Information in confidence, and will not divulge, disclose, or directly or indirectly use, copy, digest, or summarize, any Confidential Information unless necessary to comply with any applicable law, regulation, or in connection with any court or regulatory proceeding applicable in which case, any disclosure shall be subject to this paragraph, 10.c., and 10.d., below.
- b. Definition of "Confidential Information". The following constitutes "Confidential Information," whether oral or written: (a) the terms and conditions of, and proposals and negotiations related to, this Agreement, (b) information, in whatever form, that CPA shares with Contractor in the course and scope of this Agreement, or (c)

information that either Contractor stamps or otherwise identifies as “confidential” or “proprietary” before disclosing it to the other.

Confidential Information shall not include: (1) information that is generally available to the public or in the public domain at the time of disclosure; (2) information that becomes publicly known other than through any breach of this Agreement by Contractor or its Representatives; (3) information which is subsequently lawfully and in good faith obtained by Contractor or its Representatives from a third party, as shown by documentation sufficient to establish the third party as the source of the Confidential Information; provided that the disclosure of such information by such third party is not known by Contractor or its Representatives to be in breach of a confidentiality agreement or other similar obligation of confidentiality; (4) information that Contractor or its Representatives develop independently without use of or reference to Confidential Information provided by Contractor; or (5) information that is approved for release in writing by Contractor.

- c. California Public Records Act. The Parties acknowledge and agree that the Agreement including but not limited to any communication or information exchanged between the Parties, any deliverable, or work product are subject to the requirements of the California Public Records Act (Government Code Section 6250 et seq.). In order to designate information as confidential, the Disclosing Party must clearly stamp and identify the specific portion of the material designated with the word “Confidential.” The Parties agree not to over-designate material as Confidential Information. Over-designation includes stamping whole agreements, entire pages or series of pages as “Confidential” that clearly contain information that is not Confidential Information.
- d. Third Party Request for Confidential Information. Upon request or demand of any third person or entity not a Party hereto pursuant to the California Public Records Act for production, inspection and/or copying of Confidential Information (“Requested Confidential Information”), CPA will as soon as practical notify Contractor in writing via email that such request has been made. CPA will be solely responsible for taking at its sole expense whatever legal steps are necessary to prevent release to the third party of the Confidential Information designated by Contractor. If Contractor takes no such action after receiving the foregoing notice from CPA, CPA shall, at its discretion, be permitted to comply with the third party’s request or demand and is not required to defend against it. If Contractor does take or attempt to take such action, Contractor agrees to indemnify and hold harmless CPA, its officers, directors, employees and agents (“CPA Indemnified Parties”), from any claims, liability, award of attorneys’ fees, or damages, and to defend any action, claim or lawsuit brought against any of CPA Indemnified Parties for Contractor’s attempt to prevent disclosure or CPA’s refusal to disclose any Confidential Information.

## **11. Insurance**

All required insurance coverages shall be substantiated with a certificate of insurance and must be signed by the insurer or its representative evidencing such insurance to CPA within 10 business days after the Agreement is fully executed. The general liability policy shall be endorsed naming Clean Power Alliance of Southern California and its employees, officers and agents as additional insureds. The certificate(s) of insurance and required



endorsement shall be furnished to CPA prior to commencement of work and maintained throughout the Term and any Renewal Term. Each certificate shall provide for thirty (30) days advance written notice to CPA of any cancellation or reduction in coverage. Said policies shall remain in force through the life of this Agreement and shall be payable on a per occurrence basis only, except those required by paragraph (d) below which may be provided on a claims-made basis consistent with the criteria noted therein.

Nothing herein shall be construed as a limitation on Contractor's obligation under paragraph 12 of this Agreement to indemnify, defend, and hold CPA harmless from any and all liabilities arising from the Contractor's negligence, recklessness or willful misconduct in the performance of this Agreement. CPA agrees to timely notify the Contractor of any negligence claim.

Failure to provide and maintain the insurance required by this Agreement will constitute a material breach of the Agreement. In addition to any other available remedies, CPA may suspend payment to the Contractor for any services provided during any time that insurance was not in effect and until such time as the Contractor provides adequate evidence that Contractor has obtained the required coverage.

a. General Liability

The Contractor shall maintain a commercial general liability insurance policy in an amount of no less than one million (\$1,000,000.00) with a two million dollar (\$2,000,000.00) aggregate limit. CPA shall be named as an additional insured on the commercial general liability policy and the Certificate of Insurance shall include an additional endorsement page.

b. Auto Liability

Where the services to be provided under this Agreement involve or require the use of any type of vehicle by Contractor in order to perform said services, Contractor shall also provide comprehensive business or commercial automobile liability coverage including non-owned and hired automobile liability in the amount of one million dollars combined single limit (\$1,000,000.00).

c. Workers' Compensation

The Contractor acknowledges the State of California requires every employer to be insured against liability for workers' compensation or to undertake self-insurance in accordance with the provisions of the Labor Code. If Contractor has employees, a copy of the certificate evidencing such insurance or a copy of the Certificate of Consent to Self-Insure shall be provided to CPA prior to commencement of work.

d. Professional Liability Insurance

Coverages required by this paragraph may be provided on a claims-made basis with a "Retroactive Date" either prior to the date of the Agreement or the beginning of the contract work. If the policy is on a claims-made basis, coverage must extend to a minimum of twelve (12) months beyond completion of contract work. If coverage is cancelled or non-renewed, and not replaced with another claims made policy form with a "retroactive date" prior to the Agreement effective date, the Contractor must purchase "extended reporting"

coverage for a minimum of twelve (12) months after completion of contract work. Contractor shall maintain a policy limit of not less than \$1,000,000.00 per incident. If the deductible or self-insured retention amount exceeds \$100,000.00, CPA may ask for evidence that Contractor has segregated amounts in a special insurance reserve fund or Contractor's general insurance reserves are adequate to provide the necessary coverage and CPA may conclusively rely thereon.

Contractor shall be responsible for initiating, maintaining and supervising all safety precautions and programs in connection with the performance of the Agreement. Contractor shall monitor the safety of the job site(s) during the project to comply with all applicable federal, state, and local laws, and to follow safe work practices.

## **12. Indemnification**

Contractor agrees to indemnify, defend, and hold harmless CPA, its employees, officers, and agents, from and against, and shall assume full responsibility for payment of all wages, state or federal payroll, social security, income or self-employment taxes, with respect to Contractor's performance of this Agreement. Contractor further agrees to indemnify, and hold harmless CPA from and against any and all third-party claims, liabilities, penalties, forfeitures, suits, costs and expenses incident thereto (including costs of defense, settlement, and reasonable attorney's fees), which CPA may hereafter incur, become responsible for, or pay out, as a result of death or bodily injuries to any person, destruction or physical damage to tangible property, or any violation of governmental laws, regulations or orders, to the extent caused by Contractor's negligent acts, errors or omissions, or the negligent acts, errors or omissions of Contractor's employees, agents, or subcontractors while in the performance of the terms and conditions of the Agreement, except for such loss or damage arising from the sole negligence or willful misconduct of CPA, elected and appointed officers, employees, agents and volunteers.

## **13. Independent Contractor**

- a. Contractor acknowledges that Contractor, its officers, employees, or agents will not be deemed to be an employee of CPA for any purpose whatsoever, including, but not limited to: (i) eligibility for inclusion in any retirement or pension plan that may be provided to employees of Contractor; (ii) sick pay; (iii) paid non-working holidays; (iv) paid vacations or personal leave days; (v) participation in any plan or program offering life, accident, or health insurance for employees of Contractor; (vi) participation in any medical reimbursement plan; or (vii) any other fringe benefit plan that may be provided for employees of Contractor.
- b. Contractor declares that Contractor will comply with all federal, state, and local laws regarding registrations, authorizations, reports, business permits, and licenses that may be required to carry out the work to be performed under this Agreement. Contractor agrees to provide CPA with copies of any registrations or filings made in connection with the work to be performed under this Agreement.

## **14. Compliance with Applicable Laws**

Contractor shall comply with any and all applicable federal, state and local laws and

resolutions affecting Services covered by this Agreement.

**15. Nondiscriminatory Employment**

Contractor and/or any permitted subcontractor, shall not unlawfully discriminate against any individual based on race, color, religion, nationality, sex, sexual orientation, age, protected veteran status, or condition of disability. Contractor and/or any permitted subcontractor understands and agrees that Contractor and/or any permitted subcontractor is bound by and will comply with the nondiscrimination mandates of all federal, state and local statutes, regulations and ordinances.

**16. Work Product.**

All finished and unfinished reports, plans, studies, documents and other writings prepared by and for Contractor, its officers, employees and agents in the course of implementing this Agreement shall become the sole property of CPA upon payment to Contractor for such work. CPA shall have the exclusive right to use such materials in its sole discretion without further compensation to Contractor or to any other party. Contractor shall, at CPA's expense, provide such reports, plans, studies, documents and writings to CPA or any party CPA may designate, upon written request. Contractor may keep file reference copies of all documents prepared for CPA.

**17. Notices**

Any notice, request, demand, or other communication required or permitted under this Agreement shall be deemed to be properly given when **both**: (1) transmitted via email to the email address listed below; and (2) sent to the physical address listed below by either being deposited in the United States mail, postage prepaid, or deposited for overnight delivery, charges prepaid, with an established overnight courier that provides a tracking number showing confirmation of receipt.

In the case of CPA, to:

Name/Title: Theodore Bardacke, Chief Executive Officer  
Address: 801 S. Grand Ave., Suite 400, Los Angeles, CA 90017  
Telephone: (213) 376-4850  
Email: [tbardacke@cleanpoweralliance.org](mailto:tbardacke@cleanpoweralliance.org)

In the case of Contractor, to:

Name/Title: [Name, Title]  
Address: [Address]  
Telephone: [Phone]  
Email: [Email]

**18. Assignment**

Neither this Agreement nor any of the Parties' rights or obligations hereunder may be transferred or assigned without the prior written consent of the other Party. Subject to the preceding sentence, this Agreement shall be binding upon and inure to the benefit of the

Parties and their respective successors and permitted assigns.

### **19. Subcontracting**

Contractor may not subcontract Services to be performed under this Agreement without the prior written consent of CPA. If the CPA's written consent to a subcontract is not obtained, Contractor acknowledges and agrees that CPA will not be responsible for any fees or expenses claimed by such subcontractor.

### **20. Retention of Records and Audit Provision**

Contractor and any subcontractors authorized by the terms of this Agreement shall keep and maintain on a current basis full and complete documentation and accounting records, employees' time sheets, and correspondence pertaining to this Agreement. Such records shall include, but not be limited to, documents supporting all income and all expenditures. CPA shall have the right, during regular business hours, to review and audit all records relating to this Agreement during the Agreement period and for at least five (5) years from the date of the completion or termination of this Agreement. Any review or audit may be conducted on Contractor's premises, or, at CPA's option, Contractor shall provide all records within a maximum of fifteen (15) days upon receipt of written notice from CPA. Contractor shall refund any monies erroneously charged. Contractor shall have an opportunity to review and respond to or refute any report or summary of audit findings and shall promptly refund any overpayments made by CPA based on undisputed audit findings.

### **21. Conflict of Interest**

- a. No CPA employee whose position with the CPA enables such employee to influence the award of this Agreement or any competing Agreement, and no spouse or economic dependent of such employee, shall be employed in any capacity by the contractor or have any other direct or indirect financial interest in this Agreement. No officer or employee of the Contractor who may financially benefit from the performance of work hereunder shall in any way participate in the CPA's approval, or ongoing evaluation, of such work, or in any way attempt to unlawfully influence the CPA's approval or ongoing evaluation of such work.
- b. Contractor shall comply with all conflict of interest laws, ordinances, and regulations now in effect or hereafter to be enacted during the term of this Agreement. The Contractor warrants that it is not now aware of any facts that create a conflict of interest. If the Contractor hereafter becomes aware of any facts that might reasonably be expected to create a conflict of interest, it shall immediately make full written disclosure of such facts to CPA. Full written disclosure shall include, but is not limited to, identification of all persons implicated and a complete description of all relevant circumstances. Failure to comply with the provisions of this paragraph shall be a material breach of this Agreement.

### **22. Publicity**

Contractor shall not issue a press release or any public statement regarding the Agreement,

Services contemplated by this Agreement, or any other related transaction unless CPA has agreed in writing the contents of any such public statement.

**23. Governing Law, Jurisdiction, and Venue**

This Agreement shall be governed by, and construed in accordance with, the laws of the State of California. The Contractor agrees and consents to the exclusive jurisdiction of the courts of the State of California for all purposes regarding this Agreement and further agrees and consents that venue of any action brought hereunder shall be exclusively in the County of Los Angeles.

**24. Amendments**

None of the terms and conditions of this Agreement may be changed, waived, modified or varied in any manner whatsoever unless in writing duly signed by the Parties.

**25. Severability**

Should any provision of this Agreement be held invalid or unenforceable by a court of competent jurisdiction, such invalidity will not invalidate the whole of this Agreement, but rather, the remainder of the Agreement which can be given effect without the invalid provisions, will continue in full force and effect and will in no way be impaired or invalidated.

**26. Complete Agreement**

This Agreement constitutes the entire Agreement between the parties. No modification or amendment shall be valid unless made in writing and signed by each party. Failure of either party to enforce any provision or provisions of this Agreement will not waive any enforcement of any continuing breach of the same provision or provisions or any breach of any provision or provisions of this Agreement.

**27. Counterparts**

This Agreement may be executed in one or more counterparts, including facsimile(s), emails, or electronic signatures, each of which shall be deemed an original and all of which together will constitute one and the same instrument.

**IN WITNESS WHEREOF**, the parties have executed this Agreement on the date first above written.

[Signature Page Follows]

[Name of contractor].

Clean Power Alliance of Southern California

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By: [Name]

By: Theodore Bardacke

Title: [Fill in]

Title: Chief Executive Officer

**ATTACHMENT E**

**CAMPAIGN CONTRIBUTION DISCLOSURE FORM**

**Government Code Section 84308**

In accordance with California law, bidders and contracting parties are required to disclose, at the time a proposal is submitted or pre-qualified provider receives a Task Order solicitation, information relating to any campaign contributions made to Clean Power Alliance of Southern California's (CPA) Regular or Alternate Directors, including: the name of the party making the contribution (which includes any parent, subsidiary or otherwise related business entity, as defined below), the amount of the contribution, and the date the contribution was made. 2 Cal. Code of Regs. (C.C.R.) §18438.8(b).

California law prohibits a party, participant, or an agent, from making campaign contributions to a CPA Director of more than \$250 while their contract is pending before the CPA Board; and **further prohibits a campaign contribution from being made for three (3) months following the date of the final decision by the CPA Board.** Gov't Code §84308(d).

For purposes of reaching the \$250 limit, the campaign contributions of the bidder or contractor plus contributions by its parents, affiliates, and related companies of the contractor or bidder are added together. 2 C.C.R. §18438.5.

In addition, a CPA Director must abstain from voting on a contract or permit if they have received a campaign contribution from a party or participant to the proceeding, or agent, totaling more than \$250 in the 12-month period prior to the consideration of the item by the CPA Board. Gov't Code §84308(c).

The names of the Regular and Alternate Directors and their member agency is attached hereto as Attachment 1.

\* \* \* \* \*

Every bidder or contractor must disclose as follows:

**Section 1**

Bidder/Contractor (Legal Name)\_\_\_\_\_.

List any parent, subsidiaries, or otherwise affiliated business entities of Contractor (See definitions in 2 C.C.R.. §18703.1(d)):

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\*Attach additional pages, if necessary

**Section 2**

Has Contractor or Bidder (identified in Section 1) and/or any parent, subsidiary, or affiliated company, or agent thereof, made a campaign contribution(s) totaling \$250 or more in the aggregate to a Director of CPA's Board in the 12 months preceding the date of execution of this disclosure?

Yes

No

If YES, proceed to Section 3 and complete. Then, sign and date under Section 4. If NO, proceed to Section 4.

**Section 3**

| <b>Regular/Alternate Director</b> | <b>Amount of Contribution</b> | <b>Date of Contribution</b> |
|-----------------------------------|-------------------------------|-----------------------------|
|                                   |                               |                             |
|                                   |                               |                             |
|                                   |                               |                             |
|                                   |                               |                             |

\*Attach additional pages, if necessary

**Section 4**

I, \_\_\_\_\_, [print name] am authorized to sign this disclosure on behalf of the Contractor/Bidder identified in Section 1. I acknowledge and understand Government Code Section 84308 requirements. I declare the foregoing disclosures to be true and correct.

TITLE: \_\_\_\_\_

SIGNATURE: \_\_\_\_\_

DISCLOSURE DATE: \_\_\_\_\_



The following individuals listed are elected officials who serve on Clean Power Alliance's Board of Directors as either Regular or Alternate Directors. Non-elected alternate directors are not included, unless they are campaigning for elected office.

### REGULAR DIRECTORS

| <b>Member Agency</b>             | <b>Regular Directors</b> | <b>Title</b>                         |
|----------------------------------|--------------------------|--------------------------------------|
| <b>1. Agoura Hills</b>           | Deborah Klein Lopez      | Councilmember                        |
| <b>2. Alhambra</b>               | Jeff Maloney             | Councilmember                        |
| <b>3. Arcadia</b>                | Michael Cao              | Councilmember                        |
| <b>4. Beverly Hills</b>          | Julian Gold              | Councilmember                        |
| <b>5. Calabasas</b>              | David Shapiro            | Councilmember                        |
| <b>6. Camarillo</b>              | Susan Santangelo         | Councilmember                        |
| <b>7. Carson</b>                 | Cedric Hicks             | Councilmember                        |
| <b>8. Claremont</b>              | Corey Calaycay           | Councilmember                        |
| <b>9. Culver City</b>            | Albert Vera              | Mayor                                |
| <b>10. Downey</b>                | Mario Trujillo           | Councilmember                        |
| <b>11. Hawaiian Gardens</b>      | Maria Teresa Del Rio     | Councilmember                        |
| <b>12. Hawthorne</b>             | Alex Monteiro            | Councilmember                        |
| <b>13. Hermosa Beach</b>         | Justin Massey            | Councilmember                        |
| <b>14. Los Angeles County</b>    | Lindsey Horvath          | Supervisor, 3 <sup>rd</sup> District |
| <b>15. Malibu</b>                | Marianne Riggins         | Councilmember                        |
| <b>16. Manhattan Beach</b>       | Amy Howorth              | Councilmember                        |
| <b>17. Monrovia</b>              | VACANT                   |                                      |
| <b>18. Moorpark</b>              | Renee Delgado            | Councilmember                        |
| <b>19. Ojai</b>                  | Betsy Six                | Mayor                                |
| <b>20. Oxnard</b>                | Bert Perello             | Councilmember                        |
| <b>21. Paramount</b>             | Vilma Cuellar Stallings  | Councilmember                        |
| <b>22. Redondo Beach</b>         | Paige Kaluderovic        |                                      |
| <b>23. Rolling Hills Estates</b> | Debby Stegura            | Councilmember                        |
| <b>24. Santa Monica</b>          | Gleam Davis              | Councilmember                        |
| <b>25. Santa Paula</b>           | Jenny Crosswhite         | Councilmember                        |
| <b>26. Sierra Madre</b>          | Robert Parkhurst         | Councilmember                        |
| <b>27. Simi Valley</b>           | Rocky Rhodes             | Councilmember                        |
| <b>28. South Pasadena</b>        | Jon Primuth              | Councilmember                        |
| <b>29. Temple City</b>           | Fernando Vizcarra        | Councilmember                        |
| <b>30. Thousand Oaks</b>         | David Newman             | Councilmember                        |
| <b>31. City of Ventura</b>       | Liz Campos               | Councilmember                        |
| <b>32. Ventura County</b>        | Vianey Lopez             | Supervisor, 5 <sup>th</sup> District |
| <b>33. West Hollywood</b>        | John Erickson            | Councilmember                        |
| <b>34. Westlake Village</b>      | Ned Davis                | Councilmember                        |
| <b>35. Whittier</b>              | Fernando Dutra           | Councilmember                        |

**ALTERNATE DIRECTOR(S)**

| <b>County/City</b>        | <b>Alternate Director(s)</b>            | <b>Title</b>                         |
|---------------------------|---|--------------------------------------|
| 1. Agoura Hills           | Illece Buckley Weber                    | Councilmember                        |
| 2. Alhambra               | Sasha Renee Perez                       | Councilmember                        |
| 3. Arcadia                |   |                                      |
| 4. Beverly Hills          | VACANT                                  |                                      |
| 5. Calabasas              | Ed Albrecht                             | Councilmember                        |
| 6. Camarillo              | Martita Martinez-Bravo<br>Tony Trembley | Councilmember<br>Councilmember       |
| 7. Carson                 | Jim Dear                                | Councilmember                        |
| 8. Claremont              | Jennifer Stark                          | Councilmember                        |
| 9. Culver City            | Yasmine-Imani McMorrin                  | Councilmember                        |
| 10. Downey                | Tim Horn                                | Councilmember                        |
| 11. Hawaiian Gardens      |   |                                      |
| 12. Hawthorne             |   |                                      |
| 13. Hermosa Beach         |   |                                      |
| 14. Los Angeles County    |   |                                      |
| 15. Malibu                | Steve Uhring                            | Councilmember                        |
| 16. Manhattan Beach       | David Lesser                            | Councilmember                        |
| 17. Monrovia              |   |                                      |
| 18. Moorpark              |   |                                      |
| 19. Ojai                  |   |                                      |
| 20. Oxnard                |   |                                      |
| 21. Paramount             | Isabel Aguayo                           | Councilmember                        |
| 22. Redondo Beach         | Todd Lowenstein                         | Councilmember                        |
| 23. Rolling Hills Estates | Frank Zerunyan                          | Councilmember                        |
| 24. Santa Monica          |   |                                      |
| 25. Santa Paula           |   |                                      |
| 26. Sierra Madre          |   |                                      |
| 27. Simi Valley           | Fred Thomas                             | Councilmember                        |
| 28. South Pasadena        |   |                                      |
| 29. Temple City           | William Man<br>Tom Chavez               | Councilmember                        |
| 30. Thousand Oaks         |   |                                      |
| 31. City of Ventura       | Mike Johnson                            | Councilmember                        |
| 32. Ventura County        | Janice Parvin                           | Supervisor, 4 <sup>th</sup> District |
| 33. West Hollywood        | Chelsea Byers                           | Councilmember                        |
| 34. Westlake Village      | Susan McSweeney                         | Councilmember                        |
| 35. Whittier              | Octavio Martinez                        | Councilmember                        |