RFP – INSTANT AC PROGRAM

Questions & Responses

#	Question	Response
1	Scope & Eligible Product Inclusions (Gradient / Heat Pump Systems) RFP Section: Attachment A, Section 2.4.2 (Eligible products for coupon) Quoted Language: "Potential product types. Proposer will Recommend additional product types and rebate values to include as eligible equipment. Product types may include, but are not limited to: 2.4.2.1. Window heat pumps. 2.4.2.2. Portable AC units. 2.4.2.3. Portable heat pumps." Question: Does CPA intend to include innovative, plug-in saddle/over-the-sill style window heat pump units (which provide both high-efficiency cooling and efficient decarbonized heating such as Gradient systems) under the primary eligible equipment list at program launch, or are heat pumps strictly treated as an optional expansion measure to be evaluated after award?	See RFP Attachment A, Task #1, Section 2.4. CPA will select eligible equipment for initial launch of the program in its sole discretion in consultation from Proposer. CPA is looking for recommendations from the Proposer on options that will best serve CPA CARE and FERA customers. Eligible equipment must include window AC units, and other equipment such as heat pumps will be considered by CPA based on Proposer guidance and may be included at program launch. Proposers should outline how eligible CPA customers will be able to quickly purchase and receive recommended eligible equipment.
2	Coupon Value Flexibility vs. Equipment Retail Cost RFP Section: RFP Main Document, Section 2.2 (Program Budget and Engagement Targets) & Attachment A, Section 2.5 (Coupon value) Quoted Language: "CPA expects to issue approximately 9,200 coupons for efficient plug-in air conditioners ("ACs") over three (3) years where the coupon value is $300." "Coupon values should be an 'up to' amount, enabling Participants to use coupon for eligible equipment that has a retail price lower than the value of the coupon. Coupon structure should allow for flexibility if CPA elects to provide higher incentives for certain models, sizes, or categories of equipment." Question:	See RFP Attachment A, Task #1, Section 2.5. "CPA will determine the coupon value in its sole discretion, with consultation from Proposer." CPA is interested in Proposers recommendations on products and rebate values.

	Given CPA's stated goal in Section 2.1 to "enable low-income single-family and multifamily customers... to obtain a zero cost, or near zero cost high efficiency unit," will CPA consider higher tier coupon values (e.g., higher than $300) specifically for dual-function (heating and cooling), plug-in window heat pump technologies that carry higher upfront retail costs than traditional standard window AC units?	
3	API Integration and Point-of-Sale Coupon Validation RFP Section: Section 3 (Qualifications and Experience) & Attachment A, Section 2.1.1 (Participant eligibility) Quoted Language: "Proposer must have experience validating and issuing point-of-sale incentives... including the capabilities needed to integrate application programming interfaces ('API') for customer validation." "Screen for active CPA account using CPA approved method such as an application programming interface ('API') to check Participant status..." Question: Will CPA be providing a direct, live API endpoint/database interface for checking CARE/FERA enrollment and active account status in real-time at the time of coupon application, or is the Proposer expected to build and host the integration layer against static data files provided periodically by CPA/SCE?	CPA will provide a direct, live API endpoint/database interface (Postman) for checking CARE/FERA enrollment and active account status in real-time at the time of coupon application. Two separate endpoints will be provided: 1) for single customer verification and 2) for bulk verification.
4	Contractor Role in Equipment Supply Chain vs. Program Administration RFP Section: Attachment A, Task #2, Section 5 (Retailer coordination) Quoted Language: "Develop and leverage relationships with retailers, which may also include distributors or online shopping sites, to utilize, fulfill eligible equipment purchases, and provide guidance and tools for Participants to find and purchase eligible equipment." Question: Can a Proposer participate as both the Program Implementation Contractor (managing the CRM/coupons) and a Direct Fulfillment/Equipment Partner supplying specific qualifying unit types on the Participant online marketplace, provided all cost accounting and coupon redemptions remain transparent and audited?	Yes. Proposers should outline product costs and additional revenue streams generated by direct fulfillment and describe the product selection and validation approach for directly sourced equipment.

5	In-Person Distribution & Specialized White-Glove Installation RFP Section: Attachment A, Task #6, Items 1 & 2 (Program Additions and Enhancements) Quoted Language: "1. Innovative solutions for installation and delivery of eligible equipment to Participants who request such support... 2. Suggestions for in-person events where Participants can verify eligibility and receive eligible equipment or coupons directly." Question: Will CPA provide dedicated pass-through funding/budget outside of the $300 equipment coupon pool for direct white-glove installation services, logistics delivery, and local community event staging proposed under Task #6, or should all installation/event labor costs be modeled strictly within the administrative task budget lines of the Task 5.3 Pricing Matrix?	Task #6 should be modeled under the Pricing Matrix of RFP Section 5.3. An alternative cost structure may be provided in addition to the Pricing Matrix. See RFP Section 4: Scope of Service, Subsection 5.2. All costs related directly to Task #6 should be included in costs for Task #6.
6	Historical Volume Expectations & Seasonality RFP Section: RFP Main Document, Section 2.2 (Program Budget and Engagement Targets) Quoted Language: "There are approximately 220,000 CPA customers on CARE or FERA rates in CPA’s service territory. CPA expects to issue approximately 9,200 coupons for efficient plug-in air conditioners (“ACs”) over three (3) years where the coupon value is $300." Question: Based on CPA’s existing customer CARE/FERA demographic data and any prior pilot/program participation rates, does CPA have specific monthly or quarterly coupon redemption targets (e.g., heavily front-loaded during Q2/Q3 summer heat events), or should Proposers model an even, linear run-rate of approximately 255 redemptions per month (~766 per quarter) over the 36-month term?	CPA has not set specific targets beyond the 3-year target. Proposers should use their knowledge of the market and their proposed approach to develop and appropriate estimate for redemptions per month.
7	Incentive Scaling, High-Value Measure Caps, and Escrow Liquidity Support RFP Section: RFP Main Document, Section 2.2 (Program Budget and Engagement Targets) & Attachment A, Task #4, Section 4.4 (Prepaid Balance & Escrow)	The process to fund the prepaid balance in RFP Attachment A, Task #4, Section 4.4 will be determined by CPA and the selected Proposer.

CPA CLEAN POWER ALLIANCE

	Quoted Language: "Enrollment targets may be adjusted over time as coupon level may change, at CPA's discretion, and with input from the selected Proposer(s)." "Proposer shall disburse participant payments to eligible and approved Participants by drawing down on a prepaid balance of coupon funding provided to Proposer by CPA ("Prepaid Balance") as applications are approved for payment. CPA will determine the amount of the Prepaid Balance in its sole discretion." Question: If a Proposer recommends (and CPA approves) stacking multiple point-of-sale incentives based on active utility or regional incentives for proposed measures: How will CPA adjust the baseline "Prepaid Balance" held in the escrow account to ensure the Proposer maintains sufficient liquidity to float point-of-sale discounts without risk of depletion if adoption volume spikes rapidly during summer heat events?	
8	Proposal format — §6.3, §7.1 "Proposals shall include the following components…" Is there a page limit, word count, or formatting requirement for the proposal narrative? Is there a proposal template or required order of contents beyond §7.1? Does CPA have a preferred file format (e.g., PDF or Word)?	The answer to all three questions is no.
9	Alternative pricing — §5.2 "Proposer may, at its option, submit one (1) alternative pricing proposal…" Is an alternative pricing proposal additive to the base pricing proposal, or a substitute for it?	In addition.
10	Pricing matrix — §5.3 "…a pricing matrix that follows the format set forth in the table below" Is any format that reproduces the matrix sufficient? Does CPA prefer it as a separate Excel file?	Proposers should choose the format that most clearly illustrates their pricing according to the provided pricing matrix.
11	Budget and cost targets — §2.2, §5.3 "…approximately 9,200 coupons… over three (3) years where the coupon value is $300."	Proposers should suggest the budget they anticipate will be required to provide the services requested in Attachment A (Scope of Services). Incentive funding is

	Does CPA have a budget, not-to-exceed, or other guidance for implementation services, separate from coupon funding? Is this Program funded within a budget for which additional public information is available? Does CPA have cost or cost-effectiveness targets — e.g., cost per acquisition, or administrative cost as a share of total program cost? Please confirm coupon/incentive funding is not to be included in the §5.3 matrix totals.	not a component of the Pricing Matrix set forth in RFP Section 5.3.
12	Pricing evaluation — §6.4 "Proposer's Pricing (see Section 5) — 20%" Will pricing be evaluated by task, or for the proposal as a whole?	CPA will evaluate the total cost provided in the Pricing Matrix set forth in RFP Section 5.3.
13	Contract review — §7.1.5 "Any required changes to CPA's Pro Forma Contract or Data Protection Requirements." Does CPA prefer exceptions to Attachment C as redlines, or as a matrix of requested changes?	Proposers should choose the method that most clearly outlines their requested edits.
14	CRM system — Attachment A, Task #1, §3 "The CRM system must be cloud-based and not hosted on CPA infrastructure." Does CPA require a specific commercial CRM platform, or is a purpose-built cloud-hosted solution sufficient if it delivers the data fields, dashboards, user access, and record retention described in this Section?	CPA does not require a specific commercial CRM platform. Proposers should describe their approach and how it meets the needs of the Scope of Work.
15	Marketing — Attachment A, Task #1 §2.6 and Task #3 "CPA's Marketing & Communications staff… will take the lead on marketing for this Program." "CPA will assist in distributing materials through its available outreach channels…" Does CPA plan to prioritize any particular outreach channels? What channels has CPA used for this or a similar program, and what transaction volumes were achieved? Does CPA intend to use email marketing and, if so, what list size(s) are available?	See RFP Attachment A, Task #1 Section 2.6 and Task #3 for more detail on the Proposer role in marketing this program. CPA Marketing will develop outreach plans and drive awareness and program lead generation, bringing customers to the point of engagement at which point the selected Proposer will be responsible for enrolling and communicating with a participant. The integrated marketing strategy and

	Does CPA intend to use paid media and, if so, should Proposers propose a media budget, or only media management services? Can Proposers offer multiple marketing scopes as options, and how should those be shown in pricing?	media plan will be shared with the selected Proposer for visibility.
16	Coupon delivery — Attachment A, Task #4 §5 "Coupon will be redeemed through a point-of-sale discount at participating retailers for online and in-store purchases." What does CPA consider to satisfy a "point-of-sale discount" for in-store purchases, and is CPA open to a range of approaches for delivering the in-store discount?	As described in RFP Attachment A, Task #4, Section 5, CPA considers a point-of-sale discount one that enables a customer to purchase an AC unit at a discounted price without having to pay the total product cost and receive reimbursement at a later time.
17	RFP - Section 5. Pricing: What is the overall program budget anticipated for this contract?	Please see CPA's response to Question #11.
18	RFP - Section 2.2 Program Budget and Engagement Targets: How was the target of 9,200 coupons derived? And is there a minimum number of participating households targeted?	The target of 9,200 coupons is based on the approved program incentive budget and the anticipated incentive level of $300. Incentive funding is not a component of the Pricing Matrix set forth in RFP Section 5.3 and should not be included in estimated costs.
19	Scope of Services - Section 2.5.2: A coupon value of $300 is specified for a window or room AC. Further, it states that "Coupon values should be an "up to" amount, enabling Participants to use coupon for eligible equipment that has a retail price lower than the value of the coupon" which anticipates offering units that cost less than $300 each. How much flexibility does CPA have to balance unit cost with efficiency? Does CPA want to incentivize the purchase of heat pump units?	Please see CPA's response to Question #1.