

REQUEST FOR
ENERGY UPGRADE CALIFORNIA® TIME OF USE
COMMUNITY EDUCATION PROJECT PROPOSALS
DUE: WEDNESDAY, AUGUST 8, 2018
EMAIL SUBMISSIONS ONLY

SECTION 1: BACKGROUND

1.1 About Energy Upgrade California®

[Energy Upgrade California](#) is a state initiative to help Californians take action to save energy and conserve natural resources, help reduce demand on the electricity grid, and make informed energy-management choices at home and at work. It is supported by an alliance of the California Public Utilities Commission (CPUC), the California Energy Commission, utilities, regional energy networks, local governments, businesses, and nonprofits to help communities meet state and local energy and climate action goals. Funding comes from investor-owned utility customers under the auspices of the CPUC.

On September 18, 2008, the CPUC adopted the state's first Long-Term Energy Efficiency Strategic Plan, presenting a single roadmap to achieve maximum energy savings across all major groups and sectors in California. This comprehensive plan for 2009 to 2020 is the state's first integrated framework of goals and strategies for saving energy in the government, utility, and private sectors, and holds energy efficiency to its role as the highest-priority resource in meeting California's energy needs.

1.1.1 Goals of Energy Upgrade California

Energy Upgrade California works to motivate consumers to take action to better manage their energy use. The program strives to both increase awareness and education on energy management and facilitate the ability to act and incorporate technological advances or behavior change using all available resources to reduce energy and choose clean-energy options.

[For an overview of the Energy Upgrade California statewide effort, please review the Five Year Roadmap and annual Joint Consumer Action Plans.](#)

1.2 Time of Use (TOU) Initiative

California has led the way in adopting renewable energy technologies and supporting energy-efficiency strategies. However, renewable energy production doesn't yet align with times of peak energy usage, causing *much* of our available clean energy supply to be underutilized.

[TOU aims to align Californians' energy usage and the state's green energy production by introducing new TOU rate plans.](#) These TOU plans aim to dissuade customers from using energy at peak usage times while encouraging them to take advantage of California's renewable resources when they are most available.

1.2.1 Goals of TOU Initiative

The aim of Energy Upgrade California's TOU campaign is to move unengaged Californians from apathy to action.

[For an overview of the statewide TOU Energy Upgrade California effort, please see the Residential Rate Reform Blueprint.](#)

1.2.2 Community-Based Organizations (CBO) in the Energy Upgrade California TOU Initiative

CBOs (from local churches to youth organizations to environmental groups) serve as the connectors, among geographies, to provide the public with valuable information and services. Not only do they act as a conduit to the public writ large, but specialized CBOs are able to reach niche audiences who are otherwise hard to reach.

Energy Upgrade California TOU efforts are focusing on the following hard-to-reach populations:

- Low-Income
- Disability
- Multicultural
- Low-Income Seniors

As TOU has a greater effect on hot climate regions, CBOs servicing populations away from the coastal areas of the state will likely be a priority. Energy Upgrade California believes up to 8 million Californians can be targeted by these communications.

SECTION 2: PROJECT OVERVIEW

TOU Community Education Project Partners (Partners) will play an important role in creating an ongoing dialogue with the community and serves to provide informal, real-time information regarding default TOU.

Proposers should take into consideration how the requested project will complement the [statewide TOU campaign](#), which is primarily executed through mass media channels.

Through education-based outreach, Partners will help fill the gap in understanding and misconceptions among hard-to-reach populations surrounding TOU and provide alternative energy usage methods.

2.1 Project Goal

The top goal of the Energy Upgrade California TOU Community Education Project is to:

Effectively communicate with at least one of the four hard-to-reach categories identified in a meaningful way about TOU and encourage them to take advantage of off-peak TOU rates.

Energy Upgrade California will select partners that optimally balance available state resources with the priorities and abilities of each CBO in order to operationalize how to work together and effectively educate hard-to-reach audiences.

SECTION 3: SCHEDULE

RFP Issue Date:	Friday, May 25, 2018
Deadline to submit written requests for clarification:	Friday, June 15, 2018
Information Conference Call:	Monday, July 9, 2018
Proposal Due Date:	Applications must be received via email on Wednesday, August 8, 2018 by 5 PM PT Limit of 10 pages (20 pages, including appendices) Email to info@energyupgradecacommunity.org
Partners Selected:	Monday, October 1, 2018
Work Commences:	Thursday, November 1, 2018
Work Ends:	Tuesday, December 31, 2019

SECTION 4: ORGANIZATION OF RESPONSE

All proposals must include the following elements, must be organized in the following manner, and must conform to the specified maximum page limitations.

4.1 Project summary (Two pages max)

4.1.1 Eligible Applicants

Proposers should demonstrate the ability to reach a broad geographic footprint and the ability to reach a minimum of 5,000 Californians over a six-month period. The Proposer shall provide information on the organization's ability to engage at least one of the following hard-to-reach populations:

- Low-Income
- Multicultural
- Disability
- Low-Income Seniors

4.1.2 Funding Request

Proposers should indicate the monetary amount requested to successfully fulfill proposed TOU Community Education Project objectives.

4.1.3 Experience and Capabilities

The Proposer shall provide basic information relating to the team's experience, capabilities, and resources in relation to the project and should describe such things as experience with similar projects and qualifications of key personnel. Proposers should demonstrate the team's combined experience implementing grassroots or community-based outreach campaigns. All proposed projects must have an offline component.

Proposers should devote a portion of their response in this section to discussing how the team's experience and capabilities contribute to the advancement of Energy Upgrade California and the state's TOU goals. The Proposer shall identify clearly the roles of each individual that is part of the proposal, including, but not limited to:

- Project manager for project team
- Main point of contact for day-to-day operations of organization
- Outreach staff

4.2 Project Plan (Eight pages max)

4.2.1 Project Approach and Outcomes

Proposers must submit a written narrative that:

- Specifies how outreach strategies will educate at least one of the four aforementioned hard-to-reach populations on TOU
- In detail, demonstrates the ability to tactically execute against the proposed strategies. Tactical outreach examples include, but are not limited to:
 - In-person (such as door-to-door canvassing, workshops, neighborhood events, meetings, etc.)
 - Phone
 - Digital (such as social media, website, email, etc.)
 - Earned media
 - Creative offline approach
- Indicates the types of educational and outreach materials the Proposer will develop and what material resources are needed from Energy Upgrade California to successfully execute the proposed strategies and tactics
- Describes the projected reach and outcomes the proposed Community Education Project will yield
- If applicable, indicates the ability to reach non-English-speaking audiences and translate program materials

4.2.2 Project Team

Proposers should include brief bios, contact information, and role descriptions for each project team member.

4.2.3 Project Milestones

Proposers should include a timeline of project milestones, detailing a schedule of objectives and anticipated funds needed to successfully execute against the proposed community education project. Project milestones will be used to help evaluate the Partner's progress during the statewide TOU initiative (end of 2019).

4.2.4 Project Reporting

Proposers should indicate how progress will be monitored and tracked, including, but not limited to:

- A dedicated day-to-day point of contact that is not an organizational leader

- Quarterly reporting cadence and funding schedule
- Defined, metrics-based contractual scope of work
- Quarterly in-person assessments that include both a scaled grading and narrative evaluation based on Partners' quarterly report and contracted scope of work

4.3 Appendices (10 pages max)

4.3.1 Project Budget

Please provide a budget for the proposed TOU Community Education Project, including a breakdown of how funds will be used. Proposers should assign specific values to the deliverables being proposed.

4.3.2 Organizational Write-Up

Please provide a dossier on the proposing organization's mission and type of hard-to-reach audience it serves.

4.3.3 Resumes of Team Members*

Please provide one-page resumes for each team member who will be involved in the implementation of the proposed TOU Community Education Project.

4.3.4 Other Relevant Supporting Materials

To substantiate the Proposer's experience, please provide examples of marketing materials or grassroots outreach case studies that your organization has used.

*Does not count toward final page limit.

SECTION 5: EVALUATION PROCESS

Proposals will be evaluated on the following criteria:

5.1 Reach

Proposals will be evaluated first and foremost on the ability to reach and connect with at least one of our four target audiences:

- Low-Income
- Multicultural
- Disability
- Low-Income seniors

5.2 Record of Performance

The Proposer's track record of engaging in the type of outreach proposed will be an important factor in Energy Upgrade California's final decision.

5.3 Clearly-Defined Metrics and Deliverables

The level of which the Proposer is able to define projected milestones, metrics, and deliverables will be a factor in Energy Upgrade California's consideration of the proposal. While Energy Upgrade California will help define accountability tools and a reporting structure, the ability of the Proposer to self-define a successful program based on metrics is indicative of the Proposer's ability to deliver on the elements of the proposal.

SECTION 6: PERIOD OF PERFORMANCE

Energy Upgrade California anticipates having the successful Proposer begin work immediately upon contract execution on November 1, 2018, through the end of December 31, 2019.

SECTION 7: ADDITIONAL INSTRUCTIONS

Submit all materials in one packet to info@energyupgradecacommunity.org. Acceptable file formats include PDF, Microsoft Word, and Microsoft PowerPoint. File size is limited to 5 MB. No additional materials will be accepted after the RFP deadline of August 8, 2018 at 5 PM PT.

The application must be signed by a member of the applicant's board or its executive director or business owner.

Note: All background materials are available on our website:

<https://energyupgradecacommunity.org/public-documents>.

APPENDIX A: DEFINITIONS

Time of Use (TOU)

Residential electricity customers are charged different rates based on how much electricity they consume each billing period. A 2001 CPUC decision created five rate tiers, which were consolidated into four tiers beginning in 2009. Over time, the difference between the lower and upper tiers increased dramatically. A 2015 rate reform decision (D.15-07-001) determined that the number of tiers should be reduced to two and that the differentials between the tiers should be lowered. The result is that by 2019, electricity rates will only have two tiers of usage, with the second costing 25 percent more than the first.

The same decision ordered PG&E, San Diego Gas & Electric, and Southern California Edison to default residential customers to time-of-use (TOU) rates in 2019, which means the price of electricity will depend on the time of day when energy is consumed. TOU rates charge customers more when the cost to generate electricity is high (late afternoon and early evening) and less when the cost is low (all other times). This is a system that benefits the electricity grid and allows customers to reduce their bills both by reducing total consumption and shifting consumption to off-peak hours.

Low-income

As defined by U.S. Department of Housing and Urban Development (HUD), low-income refers to a household whose income does not exceed 80 percent of the median income for the area, with adjustments for smaller or larger families. HUD may establish income ceilings higher or lower than 80 percent of the median for the area on the basis of HUD's findings that such variations are necessary because of prevailing levels of construction costs or fair market rents, or unusually high or low family incomes.

Disability

The American Disability Association defines a person with a disability as a person who has a physical or mental impairment that substantially limits one or more major life activity. This includes people who have a record of such an impairment, even if they do not currently have a disability.

Appendix B: Requests for Clarifications Form

Submit this form, or a form in similar format, with your request for clarifications. Incomplete requests will be rejected. Email your request for clarification no later than 5PM PT on June 15, 2018 to info@energyupgradecacommunity.org.

Request #: _____

Section #: _____

Page #: _____

Subsection #: _____

Paragraph #: _____

Clarifications, Recommendations, Questions:

Proposer's Organization Name _____

Requestor's Name _____

Phone Number _____

Email _____

Date Submitted _____