

**SUBJECT: ADDENDUM TO REQUEST FOR ENERGY UPGRADE CALIFORNIA® TIME OF USE
COMMUNITY EDUCATION PROJECT PROPOSALS**

CLARIFICATIONS AND ANSWERS TO PROPOSERS' QUESTIONS

Date: July 2, 2018 (updated on July 13, 2018)

To: All Proposers

Reference: (a) RFP issued on May 25, 2018

(b) Information Conference Call to be held on July 9, 2018

The following questions have been submitted to Energy Upgrade California by potential Proposers. It is the intention of the corresponding answers to clarify submission requirements.

Q1. Are we limited to just one goal?

A1. No. Proposers are welcome to integrate time of use (TOU) education into an existing outreach program or initiative, which may have other goals it is attempting to accomplish. However, if TOU education is going to be integrated into an already established program, we require TOU education be a top priority within the initiative.

Q2. Are we limited to conducting outreach and education to just one population of the four listed?

A2. No. Proposers are not limited to conducting outreach and education to just one of the four hard-to-reach populations, which include low-income, disability, multicultural and low-income senior audiences. However, Proposers should indicate at least one of the four populations they intend to reach. As stated in the RFP, Proposers must demonstrate the ability to reach a minimum of 5,000 hard-to-reach Californians within a six-month time period.

Q3. Will training be provided on messaging, etc.?

A3. Yes, message training will be provided in webinar and conference call formats. Training dates will be provided once Partners are selected. In addition to online trainings, we will be available for ad hoc message training and assistance.

Q4. What is the funding range?

A4. There is no set budget or budget guideline. However, there are a defined set of deliverables and expectations outlined within the RFP. We look forward to your community education projects plans, with a thoughtful presentation of your proposal, the budget necessary to execute those plans, and a description on how that outreach will align with the existing mission and values of Energy Upgrade California.

Q4a. As CBOs we are looking to multiple communities statewide and are discovering a budget could be over a million dollars. Will that exclude us or hamper our effectiveness? Do we need to separate ourselves and not work with another group?

A4a. The statewide TOU initiative aims to reach the broadest group of Californians at the most effective cost possible. When thinking about the budget, we encourage Proposers to not think about the size of the bottom line number but how effectively dollars are being spent. If Proposers have the data and a track record within the advocacy or engagement space that demonstrates how they will accomplish the projects goal and the way to accomplish the goal requires a meaningful amount of funds, please do so.

Q5. Are there any restrictions on how the proposed funds will be spent? For example, what is the allowable overhead/indirect percentage? Is there a restriction on how much can be spent on direct staffing to support the program, etc.?

A5. No. However, Proposers are expected to provide a detailed explanation of how they are going to use the funds they are requesting.

Q6. Will outreach materials be provided to us in the medium required by our populations? For example, in braille, large print, and/or audio?

A6. A standard outreach toolkit will be provided via print and digital copies. We anticipate specialized materials will be needed to reach each of the four hard-to-reach audience categories. Therefore, Partners will have the flexibility to create and distribute unique materials, pending approval by Energy Upgrade California.

Q7. Can you share what time the July 9th conference call will be and the call-in number?

A7. The following details are for the Information Conference Call:

- **Date: July 9, 2018**
- **Time: 12 pm PST/ 3 pm EST**
- **Phone #: 1-866-469-3239 Call-in toll-free number (US/Canada)**

- **1-650-429-3300 Call-in toll number (US/Canada)**
- **Access Code: 794 115 669**

Q8. Section 4.1.1 does not state that eligible applicants must be community-based organizations; however, community-based organizations are mentioned throughout the RFP. Are eligible applicants required to be community-based organizations? If so, how does Energy Upgrade California define a community-based organization? Though not explicitly focused on one community, Global Green conducts community-based work throughout California and is a past recipient of funds from Energy Upgrade California.

A8. [According to 20 U.S.C.A § 7801\(6\)](#), the term “community-based organization” (CBO) is defined as “a public or private nonprofit organization of demonstrated effectiveness that:

(A) is representative of a community or significant segments of a community;
and

(B) provides educational or related services to individuals in the community.”

Public and private nonprofit organizations are subject to section 501(c)(3) of the Internal Revenue Code. (26 U.S.C.A. § 501(C)(3).)

Therefore, Proposers must be a CBO that qualifies as a public or private non-profit organization.

Q8a. Part of the definition is those who represent a community or significant segments of a community. Do you consider a community a geographic area or if you would also consider a community a group of people with shared interests such as low-income tenants or something similar?

A8a. **We have an elastic view on community. We believe it can be both a geographic area and/or a group of people with a shared experience or a shared passion.**

Q9. Section 4.1.1 does not state eligible or ineligible costs. Can you please clarify if there are any eligible or ineligible costs and if there is a maximum that can be spent on certain costs such as salaries and administrative expenses?

A9. **Please refer to A5.**

Q10. Based on our preliminary analysis of the hot climate regions and the demographic data, our organization would prefer to focus on Riverside and San Bernardino Counties. These two counties both have a large population of the hard-to-reach population

segments. Question – Is it ok that our proposal be targeted at two of the hot climate regions?

A10. Yes.

Q11. Please clarify the statement “Energy Upgrade California believes up to 8 million Californians will be targeted by these communications.” Is this statement pertaining to the Statewide Campaign regarding the total number of potential homeowners who can be educated on TOU Pricing as compared to the scope of homeowners in the hard-to-reach population areas?

A11. According to the [U.S. Census Bureau](#), factoring in the cost of living, nearly 8 million Californians are low-income. The low-income population is a key target for the Energy Upgrade California campaign.

Q12. Can you provide any updated information on when default TOU pricing will be going into effect? Will SCE, SDGE, and PG&E be converting homeowners to default TOU pricing on a phased-in approach, or will they be using a “big bang” migration? We would think one of the key goals in educating the homeowners on time of use is to help them understand which TOU plan would work best for them in efforts to remove the complexity of understanding the new TOU rates.

A12. San Diego Gas and Electric will be rolling out TOU pricing to its customers starting in 2019 and SCE and PG&E will be rolling out TOU pricing in 2020. All utilities will be using a ‘rolling default’ approach. In the meantime, the utilities are also encouraging customers to explore opt-in TOU rates. However, Energy Upgrade California is a statewide campaign. While the core messaging (provided to Partners) will be the same across the state, the messaging and tools used to communicate will vary depending on the area being impacted.

Q13. We are confident that our proposal will not only complement the statewide TOU campaign, it may also help augment it by leveraging our channel, which can also be used to educate all homeowners regardless of the climate or demographic makeup. If our Community Education proposal is accepted, can we also be considered to assist with the Statewide Campaign?

A13. The scope of this Energy Upgrade California Community Education project is specific to the four hard-to-reach audiences outlined in the RFP (reference A2). The top priority of all Proposers should be to reach and educate one of the four hard-to-reach audiences on TOU, regardless of other opportunities to intersect with the statewide Energy Upgrade California initiative.

Q14. Can our proposal target all four of the hard-to-reach categories, or would you prefer to have us just focus on one of the categories?

A14. Please refer to A2.

Q15. Please confirm the project goal timeline of a six-month period; however, the period of performance is through December 31, 2019. In addition to educating 5,000 homeowners, would it be beneficial if we are able to convert a percentage of these homeowners to TOU pricing and report back to Energy Upgrade California how many homeowners have switched to TOU pricing and quantify the total savings that they derived by switching to TOU pricing?

A15. Proposers can choose to reach 5,000 hard-to-reach Californians over a six-month period or 10,000 over a 12-month period.

Proposers should present reporting and metrics that demonstrate how these metrics accomplish the objectives set forth by the RFP.

Q16. Nowhere in the RFP was I able to find a grant amount...or even a budget for this. We'd like to make sure we're all on the same page regarding this.

A16. Please refer to A4.

Q17. Is the Community Education project only for customers in PG&E, San Diego Gas & Electricity (SDG&E) and Southern California Edison (SCE) regions? Are other utilities included in the outreach such as LADWP?

A17. Only Proposers conducting outreach to the service areas of Pacific Gas & Electric (PG&E), San Diego Gas & Electricity (SDG&E) and Southern California Edison (SCE) will be considered to receive funding.

Q18. Do you want outreach to renters as well as homeowners? Or are TOU rates only applicable to homeowners?

A18. The only requirement in targeting California hard-to-reach populations is to reach at least one of the four hard-to-reach audience categories (Section 4.1.1), regardless of homeownership status. TOU rates are applicable to all residential electric accounts of the listed IOUs that have not been excluded by Commission decision.

RFP: Energy Upgrade California® TOU Community Education
Addendum A - Clarifications to Questions

Q19. If you do want to reach both renters and homeowners, should the messages be different in some way? If so, how?

A19. Please refer to A18.

Q20. A technical question about the RFQ response: In the appendices section 4.3.3, will each submitted resume be counted to the 10 pages maximum count?

A20. No.

Q21. Are Proposers required to reach a minimum of 5,000 Californians during the grant term November 1, 2018 – December 31, 2019 or 5,000 each six months of the grant term for a total of 10,000?

A21. Proposers can choose to reach 5,000 hard-to-reach Californians over a six-month period or 10,000 over a 12-month period. However, we encourage Proposers to combine efforts with other CBOs if you feel your CBO cannot meet the 5,000-person minimum threshold in six months.

Q21a. Your minimum reach is 5,000- is it better for us to reach 10, 20k +?

A21a. If a project is able to go beyond 5,000 statewide by multiples of 4 or even 10 we would greatly encourage that.

Q22. What time is the information conference call and what is the number to call?

A22. Please refer to A7.

Q23. The RFP does not specify the award floor or ceiling for this proposal. What is the minimum & maximum amount of funds that can be requested for this project?

A23. Please refer to A4.

Q24. We are considering applying for the TOU grant. Could you let me know what the grant amount is and the timeframe (1 year, 2 years???). I was unable to locate this in the materials.

A24. There is no set budget or budget guideline. However, there are a defined set of deliverables and expectations outlined within the RFP. We look forward to your community education projects plans, with a thoughtful presentation of your proposal, the budget necessary to execute those plans, and a description on how that outreach will align with the existing mission and values of Energy Upgrade California.

The timeframe is outlined in 2.1 Project Goals. Work commences on Thursday, November 1, 2018, and ends on Tuesday, December 31, 2019.

Q25. Is the best place to get materials is to download from the website?

A25. Yes.

Q25a. Are there any other materials?

A25a. The best place to learn about TOU is through the CPUC website. The CPUC and IOU's will have the best technical information.

Q26. What does reaching 5,000 people look like to you?

A26. The communities we are trying to reach in this statewide initiative are quite broad. Ways to reach one group of people on TOU may not work for another. Therefore, we defer to Proposers to suggest the best way to reach at least one of the four hard-to-reach audiences and explain why the proposed form of outreach is the most effective form.

Q26a. Do CBO's need to gather information from those individuals reached?

A26a. No. However, Proposers should include a definition and rationale for what a metric for success is. (Ex. If you are at a fair, you can take a picture instead of collecting names and/or contact information.)

Q26b. Concerning outreach, does that mean you would like 5,000 customers to have been touched by media presentations and workshops they attended? Or can we go by social media and use traffic to a site as our deliverables?

A26b. Energy Upgrade California will have an overarching drumbeat of marketing and advertising (tv ads, social media, earned media). Therefore, CBOs will be reinforcing the statewide marketing efforts within specific target markets.

Q27. What is the entire cost amount of the program?

A27. The entire campaign has two million dollars in funds to disperse to CBOs.