

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

CLARIFICATIONS AND ANSWERS TO PROPOSERS' QUESTIONS

Date: October 17, 2019

To: All Proposers

Reference: (a) RFP issued on September 10, 2019

 (b) Information Conference Call held on October 1, 2019

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. What is the minimum and maximum budget amounts that can be proposed for this project?

A1. 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 project 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. Additionally, when thinking through your budget, please note that EUC will provide standard collateral (Palm Card, One Pager, FAQ) to the selected organizations.

Q2. Would you happen to know how much is available total to give in grant money?

A2. The entire campaign has 1.5 million dollars in funds to disperse to CBOs.

Q3. May we see a list of the projects that were funded last year, ideally with description and amount awarded for each project.

A3. We encourage each group to critically think about how they can complete meaningful outreach to their communities. We look forward to the new creative approaches that

CBOs will propose, with evidence of them being effective within their communities. As to not influence how CBOs structure their proposed program, we will not be sharing out a list of organizations and a description of their activities for last year's Community Education Projects. With that said, we grade based on the four categories below, which are listed by importance:

- **Reach** - Where organizations will be graded on the type of reach they propose executing, with face to face being the most preferred, and the proposed number of reach
- **Process/Project Plan** - Where organizations will be graded on their creativity, reporting plan, proposed schedule, capabilities/resources, clearly defined proposal/objectives, and planned execution of strategies
- **Record of Performance** – Where organizations will be graded on their track record of successfully executing against grants similar to this
- **Appendices** – Where organizations will be graded on their proposed budget, organizational write-up, resumes from CBO teams, and supporting material

Q4. What are the common misconceptions among hard-to-reach populations surrounding TOU from Energy Upgrade California's perspective, and do they differ by hard-to-reach group? If so, how?

A4. We recognize TOU is a hard concept to understand for many people, including harder-to-reach Californians. However, as each of the four identified audiences, as well as subgroups within those audiences, are so diverse, there are no blanket misconceptions, but rather they differ from community to community. As CBOs are experts in interacting with and reaching their constituents, we look to our Partners to identify opportunities to educate their audiences in ways that resonate.

Q5. The RFP asks that the Proposer reach at least 10,000 Californians. Is there an upside target? (And is there a max budget—at least ballpark—for a given Proposer?)

A5. There is no set upside number, however, we want to educate as many hard to reach Californians as possible. With that said, we want to make sure that CBO educators are doing so in a meaningful and effective way.

For budget, please refer to A1.

Q6. What percentage of the 10,000 Californians we are trying to reach does EUC expect to be "in-person" versus through other outreach strategies?

A6. There is no specific percentage of in-person engagements required for this RFP. We encourage you to place an emphasis on in-person or one-on-one interactions that can be reinforced by digital engagements.

Q7. Can you clarify what is meant by coastal vs. non-coastal? Is it about temperatures? Is it delineated by county? I'd like to know where you draw the line.

A7. Our remit is to engage the Critical Customer Groups, (for the purposes of this program, these include: low-income, disability, multicultural and low-income seniors) in the areas in which they reside.

These [heat maps](#) are guidelines for where there are high concentration of CARE and FERA outreach. Please keep in mind that some of the customers that are excluded from transitioning to TOU rates, they might actually benefit on a TOU plan. Therefore, TOU education should happen in all areas of all three IOU territories, regardless if these communities fall within these zones.

For more on Critical Customer Groups, please [click this link](#).

In addition, as SDG&E will be completing their transition to TOU rates in 2020, we will not as heavily prioritize outreach in SDGE's territory.

Q8. How much funding was awarded to Partners last year, and how many organizations did you provide funding to?

A8. For 2018-2019 Community Education Partner projects, Energy Upgrade California awarded \$2 million in funds across 16 CBOs.

Q9. Which areas or counties would you want us to prioritize across the state?

A9. Please refer to Q8. Also, we are focusing on areas that have greater concentrations of low-income, low-income senior, multi-cultural and disabled Californians.

In addition, as SDG&E will be completing their transition to TOU rates in 2020, we will not as heavily prioritize outreach in SDGE's territory.

Q10. If we have ideas on materials (such as crossword puzzles, etc.), are those funded separately or is that part of the RFP?

A10. Items beyond the core collateral (Palm Card, Fact Sheet and FAQ), should be included in your RFP. Please make sure you have appropriately allocated in your budget.

Q11. Regarded funding, is this carried out like a fee for service?

A11. Ultimately this funding is carried out as a contract between the individual CBO, Energy Upgrade California and the professional staff that support it which will have a not to exceed budget. Within the RFP there is a quarterly funding schedule. In order to implement funding and timely payment for CBOs, there is a quarterly funding schedule. Please see Section 7 to review the funding schedule.

Q12. Is LA County covered by RFP?

- A12.** As LAWP is not a participant in Energy Upgrade California, the citizens and ratepayers served by LAWP is not a focus of the program. Please [view this map](#) to understand what areas are service by the various energy providers.
- Q13. When we're working with media, is there a separate budget for television and op eds, or will that have to come out of the budget for this RFP?
- A13.** Energy Upgrade California has a set of professional team members that conduct public relations and advertising tactics for the statewide initiative. If you have a specific idea around engaging in media, we encourage you to write it out comprehensively. If your organization envisions handling the media engagement from soup to nuts, please include those requirements in your budget. If your organization requests support from Energy Upgrade California to garner earned or paid media coverage (media placements, booking television or radio interviews, writing op eds, etc.), please include your vision in the proposal.
- Q14. Are you putting an emphasis on reaching rural communities?
- A14.** Rural communities are important to Energy Upgrade California's outreach. Particularly due to high concentration of multicultural and low-income Californians in these parts of the state – specifically in the far north part of the state.

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For more on Critical Customer Groups, please [click this link](#).

Below are FAQs that may be helpful when creating your proposal:

- Q. Are we limited to just one goal?
- A.** 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.
- Q. Are we limited to conducting outreach and education to just one population of the four listed?
- A.** 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 10,000 hard-to-reach Californians within a twelve-month time period.

- Q. Will training be provided on messaging, etc.?
- A. **Yes, message training will be provided in webinar or in-person formats. Training dates will be provided once Partners are selected. In addition to online trainings and in-person meetings, we will be available for ad hoc message training and assistance.**
- Q. Will outreach materials be provided to us in the medium required by our populations? For example, in braille, large print, and/or audio?
- A. **A standard outreach toolkit will be provided via print and digital copies (Palm Card, One Pager, FAQ). 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.**
- Q. 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.
- A. **San Diego Gas and Electric has begun transitioning to TOU rates and SCE and PG&E will be transitioning to TOU rates 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.**
- Q. 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?
- A. **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.**